

SYSTEMATIC OR INTEGRATIVE REVIEW

RETIREMENT IN NURSING: A REVIEW OF THE LITERATURE

APOSENTADORIA NA ENFERMAGEM: UMA REVISÃO DE LITERATURA

JUBILACIÓN EN ENFERMERÍA: UNA REVISIÓN DE LA LITERATURA

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ABSTRACT

This study aimed to identify the scientific literature that deals with retirement in nursing available in the national and international literature, identifying characteristics discussed in published studies about this subject. This is an integrative literature review based on the data survey from the literature present in the Pubmed, CINAHL, and LILACS electronic databases, published between January of 2008 and December of 2012, in English, Spanish, and Portuguese. The results found over 36 selected articles demonstrate that the lack of nursing professionals is a global concern. The reduction in the number of these professionals can be explained, in particular, by the number of retirements with repercussions in the nursing education and practice. Mentoring programs and volunteering were pointed as strategies to retain nursing professionals in organizations. The determining factors that complicate the permanence in the workforce in nursing are related to social and personal issues, workload, and illnesses among workers besides inadequate working conditions. A reduced number of studies in this area was identified on a national level; leaving the study over the matter to researchers to investigate the characteristics of nursing retirement in the Brazilian context.

Keywords: Retirement; Nursing; Nursing Staff.

RESUMO

Este estudo objetivou identificar a produção científica que trata da aposentadoria na enfermagem, disponível na literatura nacional e internacional, identificando as características e o que abordam os trabalhos publicados sobre essa temática. Trata-se de uma revisão integrativa de literatura realizada a partir do levantamento de dados por meio da busca de artigos nas bases eletrônicas Pubmed, CINAHL e LILACS, publicados entre janeiro de 2008 e dezembro de 2012, nos idiomas inglês, português e espanhol. Os resultados encontrados nos 36 artigos selecionados demonstraram que a escassez de profissionais de enfermagem configura-se como uma preocupação mundial. A redução desses profissionais se dá, particularmente, pela aposentadoria de grande número de profissionais, com repercussões no ensino e na prática assistencial da enfermagem. Programas de tutoria e o voluntariado foram citados como estratégias para permanência da enfermagem nas organizações. Os fatores determinantes que dificultam a permanência da força de trabalho na enfermagem dizem respeito às questões sociais e pessoais, carga de trabalho e adoecimento dos trabalhadores, além de ambientes de trabalho sem condições adequadas. Identificou-se restrita produção de trabalhos referentes à temática em nível nacional, cabendo aos pesquisadores a realização de estudos que busquem características da aposentadoria da enfermagem no contexto brasileiro.

Palavras-chave: Aposentadoria; Enfermagem; Recursos Humanos de Enfermagem.

RESUMEN

Este estudio tiene como objetivo identificar la producción literaria científica nacional e internacional que trata de la jubilación en Enfermería, identificar sus características y discutir los trabajos publicados sobre este tema. Se trata de una revisión integradora de la literatura realizada mediante la búsqueda de artículos en las bases electrónicas de datos PubMed, CINAHL y LILACS, publicados entre enero de 2008 y diciembre de 2012, en inglés, portugués y español. Los resultados de los 36 artículos seleccionados señalan que la escasez de profesionales de enfermería es una preocupación mundial y que la disminución de estos profesionales se debe, sobre todo, a la jubilación, con impactos sobre la enseñanza y la práctica asistencial. Los programas de tutoría y el voluntariado son consideradas estrategias para retener a los enfermeros en las organizaciones. Los factores que dificultan la permanencia de la fuerza de trabajo se refieren a cuestiones sociales y personales, carga de trabajo, enfermedad entre los trabajadores y ambientes de trabajo sin las condiciones adecuadas. Se identificó poca producción sobre el tema a nivel nacional. Los investigadores deberán llevar a cabo estudios con miras a definir las características de la jubilación de los enfermeros dentro del contexto brasileño.

Palabras clave: Jubilación; Enfermería; Personal de Enfermería.

INTRODUCTION

The work follows the story of humanity and consists of a transforming action mobilized in order to meet human needs. Having strong influence on people's lives, work occupies a fundamental space in the organization of modern societies, and it is not seen only from the perspective of production of goods and services but also as an element of the constitution of identities, subjectivities, and social ties.¹

In reaching a specific period in the life cycle, the individual moves from worker to retiree. Retirement is a process that can bring changes in multiple dimensions of the human existence that are relevant to its own history.

Retirement can produce gains and losses, sometimes causing changes in people's lives, or it may be a stage of continuity, depending on the individual and social perspective of retirees in the periods immediately before and after the event.²

According to the psychosocial point of view, the literature shows that it is necessary to analyze the workers' attitudes before gains and losses coming with the transition to retirement, so that gains are strengthened and, through planning, the impact of losses is overcome.³

Retirement should not be seen only as a career ending because ceasing activities carried out for many years in a given context and breaking links and changing daily habits represent changes in both personal and social aspects.⁴

Nursing, as an essential profession to human existence exercised by nurses, technicians, and nursing assistants that are responsible for the direct care of people throughout the process of life.⁵ The nursing work is centered on the direct care to human beings, which is guided by other dimensions of its work, such as educating and managing.⁶

Considering that retirement is an important stage in human life that brings repercussions both for workers who retire and institutions in which they work, this study seeks to answer the following research question: what is considered in studies about nursing staff retirement published in the national and international literature?

This study aimed to assess the scientific production about nursing retirement available in the national and international literature, identifying the characteristics and what was addressed in these studies about this topic in the period between January of 2008 and December of 2012.

METHODOLOGY

In order to achieve the objective of this study, a literature integrative review was carried out following a defined protocol, guided by the principles of Ganong,⁷ and adapted from the model developed by Forte.⁸ The following stages were adopted for the survey: choosing the research question; defining

descriptors and inclusion and exclusion criteria in the studies; selecting the sample; building a chart for organizing and recording data; and analyzing and discussing results. The data obtained by the researchers went through the stages of selection and conference in a double-blind mode. Data collection took place in April of 2013.

The selection of articles followed the screening of titles and abstracts that met the inclusion criteria: journal articles published as full text between January of 2008 and December of 2012. This period was defined based on the availability of more updated data on the subject. The databases used were: PubMed, bibliographic research system developed by the *National Center for Biotechnology Information* (NCBI), *Cumulative Index to Nursing and Allied Health Literature* (CINAHL), and *Latin American and Caribbean Health Sciences Literature* (LILACS). The articles published in Portuguese, English, and Spanish contained the following descriptors or words: *aposentadoria*, *retirement*, *jubilación*, *enfermagem*, *nursing*, *enfermería*, *enfermeira*, *enfermeiro*, *enfermeiras*, *enfermeiros*, *nurse*, *nurses*, *enfermera*, *enfermero*, *enfermeras*, *enfermeros*, *equipe de enfermagem*, *nursing staff*, *grupo de enfermería*. Descriptors or words were grouped by crossing "retirement" with "nursing" and variations, to identify the largest quantity of productions related to the subject.

The exclusion criteria were defined as: duplicated publications in databases, theses, dissertations, literature reviews, publications in the form of letters, reviews, comments, opinion articles, case reports, abstracts in annals, dossiers, management and editorial reports, books, book chapters, government documents, and newsletters.

A total of 2,412 articles were found and 2,376 were excluded according to the established criteria. Thus, 36 studies were selected for the topic under study, 27 from CINAHL, 8 from PubMed, and 1 from LILACS, which were arranged in a chart containing: year of publication, title, author(s), journal, country of the study, descriptors or words, database, study objective, method, thematic, and results or main contributions of the study.

A careful reading of the articles selected was conducted, when the presentation of results and data discussion began, emerging the current knowledge about retirement in nursing in the national and international contexts.

RESULTS

The findings in this study show that 2008 and 2009 had the highest number of publications, with 10 in each year (55.6% in total), followed by 2010 with seven (19.4%), five (13.9%) in 2012, and four (11.1%) in 2011. With regard to the language, 35 articles (97.2%) were published in English and one (2.8%) in Portuguese.

Most publications were from the United States (19), followed by Canada (4), Australia (3), England (2), Denmark (2),

and United Kingdom, Finland, Brazil, South Africa, Lithuania and Belgium (one from each country).

The studies enabled the construction of three categories that contextualize retirement in nursing, characterizing the production of knowledge about the subject, as shown in Table 1.

DISCUSSION

SHORTAGE OF TEACHERS AND NURSING PROFESSIONALS

A concern with the shortage of nursing teachers and professionals is observed in the selected publications and the implications that this phenomenon can bring to the teaching and professional practice of care since many of these workers are in the retirement phase for being part of the *baby boomers* generation,⁹⁻¹¹ a population explosion phenomenon with people born soon after the World War II, between 1946 and 1964.

The increasing aging and retirement of the population is a phenomenon affecting almost every country in the world, leading to a structural shortage of labor in the near future. This fact has been happening in nursing,¹² bringing a shortage of skilled labor as a consequence. This demonstrates the need to keep older nurses in the institutions as a way to deal with this lack of workforce.¹⁰

The retirement of experienced teachers, associated with decreased search for teaching positions by nurses, hinders the education nursing process.¹³ Among the reasons for the shortage of teachers are aging of teaching staffs, with expected increase in the quantity of retired teachers, and lack of training of nurses with master's and doctoral degrees, which does not fulfill the requirements needed for the position of educators.¹⁴ These data are important since the shortage of nursing teachers hinders the formation of new nurses.

Scholars are concerned with the retirement of nurses and nursing teachers, especially in some areas such as in child and women healthcare.^{9,15,16} The expert nurse is that professional

who pursues his labor activity in three health care levels demonstrating in-depth knowledge and extensive experience in a specific field.¹⁷ The lack of these professionals directly affects the quality of nursing care provided to people.^{14,18}

One of the causes that lead nursing workers in many countries to leave prematurely from the labor market every year is disability retirement. The granting of this type of retirement is determined by many factors, including those related to labor activities such as the demands for physical work.^{19,20}

Among nurses working in rural areas, there is a substantial predicted increase in retirement and propensity of young nurses to seek opportunities for specialized practices available in urban centers. These demographic trends represent a threat to the sustainability of the nursing workforce in the rural scenery.²¹

RETENTION STRATEGIES FOR THE NURSING WORKFORCE

Efforts to keep nurses in the profession are essential to solving the shortage of nurses.²² Some strategies have been established to keep teachers and nurses in the workforce and deal with the shortage in organizations such as the return of retired nurses through mentoring programs or volunteering.

Several studies deal with the mentoring theme. Mentoring programs can be established in various areas where the care practice or nursing education is conducted. Studies that identify mentoring programs are highlighted as an important factor in the selection and permanence of new teachers in addition to the advantages and benefits of implementing these programs in health organizations.^{9,16,23,24}

Benefits are also observed for mentors. The experience of participating in mentoring programs enables a new connection to nursing activities and brings new challenges during retirement, with personal and professional gains.²⁴

Volunteering is another important aspect when retirees can remain active. Volunteer work is a nonprofit activity. Retirees share their experiences, contribute to organizations or health services, and help others.

Table 1 - Categories identified in the scientific production dealing with retirement in Nursing in the national and international literature - Florianópolis, 2008-2012

Shortage of teachers and professionals	Retention strategies for the nursing workforce	Determinant factors hindering retention in the labor market
<ul style="list-style-type: none"> - Aging and retirement of the nurses' workforce and teachers X qualification for nursing work. - Early retirement of nurses. - Disability retirement. 	<ul style="list-style-type: none"> - Development of mentoring programs. - Retention of older nurses in the labor market. - Encouraging volunteer work. 	<ul style="list-style-type: none"> - Need to provide family assistance. - Changes related to new technologies. - Workplace is distant from the urban area. - Stress related to work and influence of work on the health of nursing professionals.

Source: elaborated by the authors based on the research data.

Retired nurses have accumulated years of experience in nursing. These professionals report that they feel renewed when volunteering in nursing activities. Volunteering is a way for the nursing profession to use knowledge of more experienced professionals already retired to contribute to the community and provide satisfaction to volunteers, who are using their knowledge to help others. Feeling useful can be beneficial from the perspective of life and of collaborating to promote health and well-being.^{25,26}

The retired person may decide to pursue a second career in which he can develop a self-employment activity or continue his activities in the same or others organization.⁴

There is also the expectation of nurses to work until an older age and this may be influenced by economic situation and life conditions.²⁷ Thus, due to financial limitations, people who could retire, stay in the labor market.²⁵

Not all who are close to retirement have saved enough money to live without working and, even with their retirement, it is not enough for their needs. To ensure survival during retirement or even the feeling of well-being and self-esteem improvement, many retired workers return to the labor market.³

Benefits can be found in hiring workers over 50 years old. At this age, people feel more creative, motivated, with more autonomy, are more committed, demonstrate greater capacity to solve problems, are more reliable, have more consistency and ethics in their behavior at work and, in general, have more experience.³

DETERMINANT FACTORS HINDERING THE RETENTION IN THE LABOR MARKET

Personal and social factors influence the decision of nurses to anticipate retirement.²⁸ Factors as responsibilities with family, being married and take care of dependents at home such as children and elderly parents, predispose to early retirement from the nursing workforce.²²

The incorporation of technologies in the health work process demands new actions, sometimes requiring multiple skills from nursing workers. One of the factors that led nurses, aged 50-65 years old who worked in an intensive care unit, to think about early retirement were changes related to new technologies.²⁹

Some approaches to engaging older nurses in health institutions are becoming common in nursing. However, it is necessary to make adjustments to contexts when the work is performed in remote locations.³⁰ One of the challenges of managing the nursing workforce refers to the need for attention to selection and retention policies of older nurses, especially in rural areas.³¹

Factors contributing to the intention of nurses to retire early are: health perception, opportunities to change profession, excessive workload, absence of good working conditions, and negative stereotypes of older workers.¹²

The stress related to work is one of the decisive factors for nurses to leave their jobs.³² Stress among workers, especially those in nursing, has important consequences for the health of professionals and compromise the quality of care provided to patients.³³

The results from a research performed in a European country revealed significant associations between self-assessment of health, psychosocial factors, and job dissatisfaction among nurses. Low level of capacity for work, health conditions, and lifestyle are situations that can lead to anticipation of retirement.³⁴

A significant contingent aging has occurred in the Brazilian nursing. Similarly to other professions, from the perspective of Social Security, nursing professionals began to postpone the date of retirement, although these workers suffer from relevant psychological and physical stress inherent to the activities they carry out.³⁵

Research results found that the relationship between lifestyle, work environment, socio-demographic factors, and leaving from the labor market due to disability retirement among nurses reported that these professionals, when working in disadvantaged environments and/or not having healthy lifestyles presented high risks for retirement due to disability. Singles had low incomes and those working in night shifts had more risks than those who work only during the day. Moreover, the great physical demand at work increased the probability of leaving work because of disability.¹⁸

The health risk factors related to disability retirement among nursing assistants are low back pain of long duration, upper extremity disorders, and inflammatory rheumatic diseases.¹⁹

The lack of flexible programs and lack of nursing activities that provide the practice without heavy physical workload may prevent the continuous care practice and maintenance of nurses, aged 55 to 62 years old, in the workforce. Due to the activity performed, some professionals present musculoskeletal problems such as arthritis in the hands, knees, or hips.¹⁰

These review's findings relating working conditions with illnesses are similar to those reported by Dejours.³⁶ According to this author, poor working conditions expose the body to risks of occupational diseases, accidents, and decreased life expectancy.

Nursing teachers identified the influence of the workload, responsibilities of teaching, resources available for work, personal and professional characteristics, and work environment as areas that could be improved to encourage the retention of the workforce in teaching.³⁷

Candidates that probably would return to the profession are inactive nurses. However, efforts should be made to improve the work environment and reduce work stress providing adequate resources so these workers can provide quality care. In addition, significant improvements in working conditions can delay the retirement of older nurses.^{32,38}

Measures to encourage nurses to remain working include workload reduction for those who are nearing retirement, op-

portunities for career advancement, reduction in prejudice about age, and increased autonomy in performing their functions.³⁹

Factors that influence nurses to remain in their jobs are related to financial, safety at work, materials, and adequate equipment among others.¹¹

Working conditions influence the work process and greatly contribute to determining the health/disease process in nursing workers. The material, psychological, and social resources of working conditions determined by factors of the economic, technical, and organizational environment of nursing workers were considered conditioning in that process.⁴⁰

Nursing is a profession recognized as essential to society. However, there is a contradiction between this importance and the working conditions in which nurses, technicians, and nursing assistants carry out their activities. Thus, the retention strategies of this professional workforce should be linked to the improvement of working conditions, which is a conditioning and determining factor for the permanence of these workers in the profession.

FINAL CONSIDERATIONS

The results showed that the shortage of nursing professionals, teachers, and nurses is configured as a global concern. According to the analyzed studies, this reduction of professionals occurs in large numbers because of retirement by the many professionals who are part of the *baby boomer* generation. The departure of these professionals has affected the nursing teaching and care practices through the loss of more skilled and experienced workers.

Mentoring and volunteering programs were identified as strategies for the retention of nurses in organizations. These actions bring benefits to organizations, professionals, and society.

Research showed that nursing professionals often keep working despite having reached the time for retirement, or return to work after retirement. This occurs because of financial constraints to meet basic needs.

The determining factors that hinder the retention of the nursing workforce are related to social and personal issues, workload, illnesses in workers, and environments with inadequate working conditions.

A restricted production of studies on this issue was identified at the national level in this study, leaving the study of the matter to researchers to investigate the Nursing retirement characteristics in the Brazilian context.

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