

# Retaining Experts: Retention Incentives of Clinical Laboratory Professionals

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## ABSTRACT

A survey of members of the American Society for Clinical Laboratory Science (ASCLS) was taken in May, 2012 to study workplace incentives and personal factors that could encourage clinical laboratory professionals (CLP) to continue working past retirement eligibility. Benefits, compensation, and opportunity for part-time work were key retention incentives identified by CLP in all age and job function groups. Career stage was shown to play a significant role in how CLP rated the importance of several retirement incentives, suggesting that age differences exist in workplace factors and personal motivators for continuing to work. There are also differences among practitioners, administrators, and educators in how they view incentives for working past retirement eligibility. Results of the study may help laboratory administrators advocate for workplace changes important to retaining staff of varying age and job function.

**ABBREVIATIONS:** CLP - Clinical Laboratory Professionals, ASCLS - American Society for Clinical Laboratory Science, MLT - Medical Laboratory Technician, MLS - Medical Laboratory Scientist

**INDEX TERMS:** Workforce, Retirement, Medical Laboratory Personnel

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## INTRODUCTION

One strategy to address the growing shortage of clinical laboratory professionals (CLP) is to encourage retention of senior staff in the workplace. This approach not only increases the number of staff, but capitalizes on the retention of the knowledge and expertise of experienced senior professionals. Furthermore, retention of current staff reduces the costs associated with recruiting and training new employees. The need to retain aging Baby-boomers—born between 1946 and 1964—in the workforce is not unique to the clinical laboratory profession, but is important to many American businesses in which the supply of young workers is inadequate to replace retirement-eligible employees.<sup>1</sup>

Recent retirement trends in the general population may lessen the workforce shortage somewhat by increasing retention of older CLP, but the problem is unlikely to be resolved for the long term without strategic workforce planning. The 2012 Retirement Confidence Survey (2012 RCS) found that 37% of randomly selected workers in the general population expect to remain working past age 65, compared to only 11% of workers in 1991.<sup>2</sup> Data from the Census Bureau indicates that 33% of men and 25% of women aged 65 to 69 were employed in 2009 compared to 26% and 17%, respectively, employed in 1990.<sup>3</sup> Uncertainty about the economy is a factor driving workers to work longer and postpone retirement. A report published in October, 2012 by the Pew Research Center indicates that Americans are increasingly concerned that they will have insufficient retirement resources. Furthermore, this

concern is greater in younger and middle-aged adults than in people closer to retirement age—a reversal of results obtained from a similar survey taken in 2009.<sup>4</sup> The 2012 RCS reports that more than half of all American workers have not calculated how much money they will need to live comfortably in retirement, many have saved very little for retirement, and many lack confidence about having sufficient money post-retirement to pay for medical expenses.<sup>2</sup> It remains to be seen if these trends will continue if the economy recovers from the current recession.

Retention of older CLP in the workplace is largely unstudied, but has been a focus for investigation for the general population and for other fields such as nursing. The 2008 Retirement Confidence Survey found that for the general population, major reasons for working in retirement included wanting to stay active and involved, keeping health insurance and other benefits, enjoying working, and wanting to continue to earn money to make ends meet and buy extras.<sup>5</sup>

The literature on older nurses informed our study because nurses, like CLP, are predominantly female and older than average compared to other occupations. Factors important to older nurses' decisions to remain in nursing included recognition and respect, compensation, job design, flexible work options, training and development, and others.<sup>6</sup> Using focus groups, Kirgan and Golembeski identified strategies to promote retention of experienced nurses that included fewer hours, flexible scheduling, increased paid time off, respect and recognition of expertise, and increased staffing levels.<sup>7</sup> Strategies to consider in fostering retention of aging nursing faculty were identified by Falk. They included health, fitness, and nutrition programs, suitable classrooms and workstations, lifelong learning programs, workplace flexibility options, retirement flexibility options, and salary and financial incentives.<sup>8</sup> Another study used focus groups consisting of solely Baby-boom generation nurses to explore suggestions for retaining experienced nurses in direct patient care in a pediatric hospital. The most challenging aspects of these nurses' jobs were the physical demands and mental challenges of working 12-hour shifts. Suggestions for improving retention included reducing physical demands and the number of hours per shift. The participants also cited a need for a flexible benefits package that takes into account the

employee's age.<sup>9</sup>

The present study was undertaken to assess workplace incentives and personal factors that would encourage CLP to continue working past the time of eligibility for retirement. Research questions included:

1. What workplace changes and other incentives encourage clinical laboratory professionals to continue working in the clinical laboratory beyond traditional retirement age? Which are most important?
2. Does the importance of the workplace change or incentive differ by respondents' age group or job function group?
3. What are the most important personal factors that motivate a decision to continue working past the time an employee is eligible to retire?
4. Do the personal factors that motivate a decision to work beyond retirement eligibility differ based on respondents' age group or job function group?

## METHOD

Data for this study were collected as part of a comprehensive online retirement survey of members of the American Society for Clinical Laboratory Science (ASCLS) sent by email in May, 2012. Email messages were successfully sent to 4,448 ASCLS members out of the 4,634 members for whom email addresses were available. A description of the instrument, the Clinical Laboratory Professionals Retirement Survey, is contained in the first article in this series, *Retaining Experts: Retirement Plans of Laboratory Practitioners*. The study was approved by the Institutional Review Board of the Office of Human Research Ethics at the University of North Carolina at Chapel Hill.

In the first section of this study, respondents rated the importance of 40 potential workplace changes and other incentives for working beyond retirement eligibility. Incentives were organized on the survey by 6 categories: alternative work schedules, benefits/compensation, education/training, physical environment/technology, redesigned work roles, and recognition. The number of factors per category ranged from 4 to 8 (See Table 1). In the second section of this study, respondents rated the importance of seven factors as personal motivators in working beyond retirement eligibility. Personal motivators included additional income, benefits, person-

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**Table 1.** Importance ratings of retention factors for total respondents and by age group.

Factors encouraging clinical laboratory practitioners to work beyond time of retirement eligibility	Mean All Respondents	ANOVA <i>F</i> ( <i>p</i> )	Mean age group Early career (E)	Mean age group Mid Career (M)	Mean age group Late Career (L)	Mean age group Retirement Eligible	Post hoc comparisons (LSD)
<b>BENEFITS/COMPENSATION</b>							
Full health insurance and other benefits for part-time employees	4.2	4.398 (.004)	4.1	4.2	4.3	3.8	NA
Increased employer contributions for retirement	3.9	6.629 (0.000)	4.2	3.9	4.0	3.5	E,M,L>RE
Longevity pay increases/bonuses	4.0	6.523 (0.000)	4.2	3.9	4.0	3.5	E,L>RE
Group purchase of insurance, e.g., life, disability, long-term care insurance	3.6	1.289 (0.277)	3.6	3.8	3.7	3.5	NA
Increased paid time off for workers over age 50	3.5	4.364 (0.005)	3.5	3.6	3.6	3.0	NA
Financial and retirement planning programs	3.2	2.336 (0.072)	3.4	3.2	3.2	2.9	NA
Support to reduce burden of care-giving for dependents	2.9	7.841 (0.000)	3.1	3.2	2.8	2.5	M>L,RE
Wellness, nutrition, or fitness counseling	2.5	1.395 (0.243)	2.7	2.5	2.5	2.4	NA
<b>ALTERNATIVE WORK SCHEDULES</b>							
Ability to work part-time, e.g. half days	3.7	2.333 (0.073)	3.6	3.8	3.8	3.5	NA
“Personalized” nontraditional schedule	3.6	0.921 (0.430)	3.5	3.7	3.7	3.6	NA
Scheduling on day shift only	3.6	1.475 (0.220)	3.6	3.6	3.7	3.4	NA
Limit on number of consecutive work days	3.4	1.856 (0.136)	3.5	3.5	3.4	3.1	NA
Scheduling on weekday shifts only	3.2	0.370 (0.774)	3.2	3.3	3.3	3.1	NA
Job-sharing (1 full-time position shared by 2 or more staff)	2.4	4.268 (.005)	2.2	2.5	2.4	2.0	NA
More or longer breaks during shift	1.8	8.397 (.000)	2.2	2.0	1.7	1.5	E,M>L,RE
Scheduling on weekend shifts only	1.5	3.894 (.009)	1.4	1.7	1.4	1.6	NA
<b>PHYSICAL ENVIRONMENT &amp; TECHNOLOGY</b>							
Ergonomic equipment, chairs, and work stations	3.6	1.612 (0.185)	3.7	3.6	3.6	3.3	NA
Reduced standing	3.4	1.522 (0.207)	3.4	3.5	3.3	3.1	NA

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Comfortable rest and break areas	3.3	4.428 (0.004)	3.5	3.4	3.2	3.0	NA
Low level of ambient noise to facilitate verbal communication	3.2	2.387 (0.068)	2.9	3.3	3.2	3.1	NA
Improved lighting	3.2	0.126 (0.945)	3.2	3.2	3.2	3.2	NA
Readily accessible equipment to reduce reaching and bending	3.2	3.578 (0.014)	3.3	3.3	3.1	2.9	NA
Increased font size on printed materials and computer screens	3.0	4.318 (0.005)	2.6	3.1	3.1	3.0	NA
Access to magnifying devices at the bench	2.7	3.249 (0.021)	2.5	2.9	2.7	2.5	NA

## EDUCATION AND TRAINING

Paid off-site and online CE programs	3.3	5.334 (0.001)	3.6	3.4	3.2	2.9	E,M >RE
Free on-site CE programs during working hours	3.3	5.352 (0.001)	3.6	3.4	3.2	2.9	E,M >RE
On-the-job re-training for new roles and duties	3.3	11.262 (0.001)	3.6	3.6	3.2	2.7	E,M,L >RE E,M >L
Tuition reimbursement for college courses	2.5	13.386 (0.000)	3.1	2.7	2.3	2.0	E,M >L, RE
Management training	2.7	17.605 (0.000)	3.2	3.1	2.4	2.3	E,M >L, RE

## REDESIGNED WORK ROLES

Work on special projects rather than traditional testing role	3.3	1.007 (0.389)	3.2	3.4	3.3	3.1	NA
Perform formal mentoring role for new staff/recent grads	3.1	5.110 (.002)	3.2	3.3	2.9	2.9	NA
Transition to a staff development or student teaching role	2.9	8.164 (0.000)	3.2	3.2	2.8	2.6	E,M >RE M >L
Assignment to less stressful work areas or benches	2.9	4.654 (0.003)	3.0	3.0	2.8	2.4	NA
Increased direct interaction with users of lab data such as physicians	2.7	1.583 (0.192)	2.9	2.8	2.6	2.6	NA
Assignment to "special testing" areas rather than "core lab"	2.8	3.324 (0.019)	3.0	2.9	2.7	2.5	NA
Assignment to areas with less testing and more supervisory functions	2.7	3.649 (0.012)	2.9	2.8	2.6	2.4	NA

## RECOGNITION

Formal recognition for length of service	3.0	7.484 (0.000)	3.6	3.1	2.9	2.8	E >L, RE
Seeking of my advice by supervisors	3.0	3.498 (0.015)	3.3	3.1	2.9	2.8	NA
Seeking of my advice by co-workers	2.9	3.728 (0.011)	3.1	3.0	2.8	2.7	NA

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Social functions just for senior staff	1.9	2.943 (0.032)	2.0	2.0	1.8	1.6	NA
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	Total responses, N	Early career age group, N	Mid career age group, N	Late career age group, N	Retirement eligible age group, N
Total # CLP Retirement Survey respondents	1049	103	262	386	81
# respondents/item for this study, range*	735 - 808	92 - 98	240 - 258	331 - 376	71 - 78

NA = not applicable  
\*not all survey respondents answered every question

**Table 2.** Importance ratings of retention factors for total respondents and for job function groups

Factors encouraging clinical laboratory practitioners to work beyond time of retirement eligibility	Mean All Respondents	ANOVA <i>F</i> ( <i>p</i> )	Mean Practitioners (P)	Mean Educators (E)	Mean Administrators (A)	Post hoc comparisons (LSD)
<b>BENEFITS/COMPENSATION</b>						
Full health insurance and other benefits for part-time employees	4.2	0.111 (0.895)	4.2	4.2	4.1	NA
Increased employer contributions for retirement	3.9	1.202 (0.301)	3.9	3.9	3.8	NA
Longevity pay increases/bonuses	3.9	5.187 (0.006)	4.0	3.8	3.8	NA
Group purchase of insurance, e.g., life, disability, long-term care insurance	3.6	0.596 (0.551)	3.6	3.6	3.6	NA
Increased paid time off for workers over age 50	3.5	0.682 (0.506)	3.5	3.5	3.4	NA
Financial and retirement planning programs	3.2	2.521 (0.081)	3.3	3.1	3.1	NA
Support to reduce burden of care-giving for dependents	2.9	1.497 (0.224)	3.0	2.8	2.8	NA
Wellness, nutrition, or fitness counseling	2.5	2.060 (0.128)	2.6	2.4	2.5	NA
<b>ALTERNATIVE WORK SCHEDULES</b>						
Ability to work part-time, e.g. half days	3.7	4.686 (0.009)	3.7	3.8	3.5	NA
“Personalized” nontraditional schedule	3.6	1.811 (0.164)	3.6	3.7	3.5	NA
Scheduling on day shift only	3.6	5.263 (0.005)	3.4	3.6	3.8	NA
Limit on number of consecutive work days	3.4	2.659 (0.071)	3.4	3.4	3.2	NA
Scheduling on weekday shifts only	3.2	1.451 (0.235)	3.2	3.1	3.3	NA

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Job-sharing (1 full-time position shared by 2 or more staff)	2.4	4.076 (0.017)	2.5	2.2	2.3	NA
More or longer breaks during shift	1.8	17.258 (0.000)	2.1	1.6	1.6	P>E,A
Scheduling on weekend shifts only	1.5	4.455 (.012)	1.6	1.4	1.5	NA

## PHYSICAL ENVIRONMENT & TECHNOLOGY

Ergonomic equipment, chairs, and work stations	3.6	5.420 (0.005)	3.7	3.4	3.5	NA
Reduced standing	3.3	5.546 (0.004)	3.4	3.1	3.3	NA
Comfortable rest and break areas	3.3	20.628 (0.000)	3.5	3.0	3.0	P>E,A
Low level of ambient noise to facilitate verbal communication	3.2	7.941 (0.000)	3.3	3.0	3.0	P>E,A
Improved lighting	3.2	1.198 (0.302)	3.3	3.1	3.2	NA
Readily accessible equipment to reduce reaching and bending	3.1	9.474 (0.000)	3.3	2.9	3.0	NA
Increased font size on printed materials and computer screens	3.0	2.220 (0.109)	3.1	2.9	3.0	NA
Access to magnifying devices at the bench	2.7	4.589 (0.010)	2.8	2.6	2.6	NA

## EDUCATION AND TRAINING

Paid off-site and online CE programs	3.3	3.821 (0.022)	3.4	3.2	3.1	NA
Free on-site CE programs during working hours	3.3	3.715 (0.025)	3.4	3.2	3.1	NA
On-the-job re-training for new roles and duties	3.3	8.307 (0.000)	3.4	3.0	3.2	P>E
Tuition reimbursement for college courses	2.5	5.303 (0.005)	2.6	2.6	2.2	NA
Management training	2.7	3.653 (0.026)	2.7	2.5	2.8	NA

## REDESIGNED WORK ROLES

Work on special projects rather than traditional testing role	3.2	2.356 (0.095)	3.1	3.2	3.3	NA
Perform formal mentoring role for new staff/recent grads	3.0	5.951 (.003)	2.9	3.2	3.0	NA
Transition to a staff development or student teaching role	2.9	4.614 (0.010)	2.8	3.1	2.9	NA
Assignment to less stressful work areas or benches	2.9	2.679 (0.069)	3.0	2.8	2.8	NA
Increased direct interaction with users of lab data such as physicians	2.7	3.841 (0.022)	2.6	2.9	2.8	NA

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Assignment to “special testing” areas rather than “core lab”	2.7	7.430 (0.001)	2.9	2.7	2.5	NA
Assignment to areas with less testing and more supervisory functions	2.6	4.018 (0.018)	2.5	2.6	2.8	NA

RECOGNITION

Formal recognition for length of service	3.0	1.999 (0.136)	3.1	2.9	2.9	NA
Seeking of my advice by supervisors	3.0	1.012 (0.364)	3.1	2.9	3.0	NA
Seeking of my advice by co-workers	2.8	0.975 (0.378)	2.9	2.7	2.8	NA
Social functions just for senior staff	1.8	2.335 (0.097)	1.9	1.8	1.8	NA

	Total responses,	Practitioners, N	Educators, N	Administrators, N
Total # CLP Retirement Survey respondents	1049	441	260	253
# respondents/item for this study, range*	840-928	391-424	224-251	225-248

NA = not applicable  
\*not all survey respondents answered every question

Table 3. Importance ratings of personal motivators for all respondents and for age groups.

Factors encouraging clinical laboratory practitioners to work beyond time of retirement eligibility	Mean All Respondents	ANOVA F (p)	Mean age group Early career (E)	Mean age group Mid Career (M)	Mean age group Late Career (L)	Mean age group Retirement Eligible	Post hoc comparisons (LSD)
Benefits	4.2	10.169 (0.000)	4.4	4.3	4.2	3.7	E,M,L>RE
Additional income	4.0	11.144 (0.000)	4.3	4.1	3.9	3.5	E,M,L>RE E>L
Personal fulfillment	4.0	0.173 (0.915)	4.0	4.0	4.0	3.9	NA
Keep mentally alert	3.9	1.009 (0.388)	3.8	3.9	4.0	4.0	NA
Keep physically busy and active	3.8	0.355 (0.785)	3.7	3.8	3.8	3.8	NA
Dedication to clinical laboratory profession	3.6	2.416 (0.065)	3.6	3.7	3.6	4.0	NA
Loyalty to current employer	3.0	2.418 (0.065)	3.0	2.9	2.9	3.3	NA

  

	Total responses, N	Early career age group, N	Mid career age group, N	Late career age group, N	Retirement eligible age group, N
Total # CLP Retirement Survey respondents	1049	262	386	81	
# Respondents/item for this study, range*	783 - 793	94 - 95	247 - 248	367 - 374	74 - 76

NA = not applicable  
\*not all survey respondents answered every question

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**Table 4.** Importance ratings of personal motivators for all respondents and for job function groups

Personal motivator for working beyond time of retirement eligibility	Mean All Respondents	ANOVA F (p)	Mean Practitioners (P)	Mean Educators (M)	Mean Administrators (L)	Post hoc comparisons (LSD)
Benefits	4.2	0.748 (0.473)	4.2	4.1	4.2	NA
Additional income	4.0	2.350 (0.096)	4.0	3.9	3.9	NA
Personal fulfillment	4.0	2.647 (0.071)	3.9	4.0	4.0	NA
Keep mentally alert	3.9	5.956 (0.003)	3.8	4.0	4.0	NA
Keep physically busy and active	3.8	2.715 (0.067)	3.7	3.8	3.8	NA
Dedication to clinical laboratory profession	3.6	4.133 (0.016)	3.5	3.8	3.7	NA
Loyalty to current employer	3.0	4.244 (0.015)	2.8	3.0	3.2	NA
	<b>Total responses,</b>		<b>Practitioners, N</b>	<b>Educators, N</b>	<b>Administrators, N</b>	
Total # CLP Retirement Survey respondents	1049		441	260	253	
# Respondents/item for this study, range*	901 - 908		420 - 423	244 - 249	235 - 238	

NA = not applicable  
 \*not all survey respondents answered every question

al fulfillment, keeping mentally alert, keeping physically active, professional dedication, and loyalty to employer (See Table 3).

Ratings of factors in both sections were made on identical 5-point scales in which: 1 = not at all important, 2 = slightly important, 3 = somewhat important, 4 = very important, and 5 = extremely important.

Descriptive statistics were used to tabulate responses and calculate means. Incentives/ workplace changes and personal motivators were ranked from high to low based on mean ratings. One way analysis of variance (ANOVA) was used to analyze differences among subgroups defined on the basis of age and job function. Post-hoc comparisons of significant ANOVA results ( $p \leq 0.001$ ) were made using least significant difference (LSD). IBM SPSS Statistics 20 was used to analyze the data.

Three job function groups were created: practitioners, educators, and administrators. The practitioner group

included respondents who identified their major job function as phlebotomist, laboratory assistant, medical laboratory technician (MLT), or medical laboratory scientist (MLS). MLT and MLS educators were combined to form the educator group. The administrator group included respondents who indicated their major job function is laboratory supervisor, manager, administrator, or director. Age groups were defined as early career (less than 30 years of age), mid-career (30 – 50 years of age), late career (51 – 62 years of age), and retirement eligible (over 62 years old).

The study team considered incentives and personal factors to be highly important if the average rating was  $\geq 3.5$ .

**RESULTS**

Survey responses were received from 1206 clinical laboratory professionals for an overall response rate of 27%. Only the 1049 respondents who indicated they were still working in the clinical laboratory profession and were not already retired were included in the



analyses. CLP with job functions other than practitioner, educator, or administrator were excluded from analyses which were based on job function group. Respondents who did not indicate their age were excluded from analyses which were based on age group. The numbers of total usable responses for this study and for the overall CLP Retirement Survey are shown in Tables 1 – 4. Ranges are reported for the number of usable responses because the number of respondents varied by item.

### Retention Incentives

The mean rating scores for the incentives that would encourage CLP to work past retirement age are found in Table 1. The retention incentives rated most highly by total respondents (ranked from highest to lowest importance), were:

- full health insurance and other benefits for part-time employees
- longevity pay increases/bonuses
- increased employer contributions for retirement
- ability to work part-time
- personalized nontraditional schedule
- scheduling on day shift only
- group purchase of insurance, ergonomic equipment
- increased paid time off for employees over age 50

These 9 factors, all rated highly important (mean  $\geq 3.5$ ), represented the three categories of benefits/compensation (5 factors), alternative work schedules (3 factors), and physical environment/technology (1 factor). The respondents' ratings of the incentives were compared across age groups (Table 1) and job function groups (Table 2).

### Benefits and Compensation

Full health insurance and other benefits for part-time employees was the single most highly rated incentive for all age groups except the early career group. The early career group ranked increased employer contributions for retirement and longevity pay increases/bonuses more highly. Other benefits and compensation incentives, including increased employer contributions for retirement, longevity pay increases/bonuses, and group purchase of insurance were rated as highly important for all age groups. Increased paid time off for workers over 50 was rated important for every age group except those

in the retirement eligible group.

When ratings were compared by age groups, the early career, mid-career, and late career age groups rated increased employer contributions for retirement as significantly more important than did the retirement eligible age group. The importance of longevity pay increases/bonuses was significantly greater for the early career and late career age than for the retirement eligible age group. Respondents in the mid-career age group rated support for reducing the burden of care-giving higher than respondents in the late career and retirement eligible groups. In tests of statistical significance, importance ratings did not differ significantly by job function groups.

### Alternative work schedules

Incentives related to alternative work schedules, such as ability to work part-time or have a personalized non-traditional schedule, were rated as highly important and appear among the top rankings for all age groups. Having more or longer breaks was considered more important by early and mid-career age groups compared to late and retirement eligible groups, and was also more important to practitioners than to educators and administrators.

### Physical environment and technology

The total group of respondents ranked ergonomic equipment, chairs, and work stations as a highly important retention incentive (mean  $\geq 3.5$ ), and there were no significant differences among age groups. Practitioners rated three aspects of the physical environment: comfortable rest and break areas, a low level of ambient noise to facilitate verbal communication, and readily accessible equipment to reduce reaching significantly higher than educators or administrators. Only comfortable rest and break areas was rated as highly important (mean = 3.5) by the practitioner group.

### Education and Training

None of the incentives in the education and training group were rated as highly important by the overall group but there were significant differences in mean responses based on age and job function. In each of the education and training incentives, younger respondents (early and mid-career) rated the incentives as more important than the older respondents (late career and

retirement eligible). When responses were compared by job function, practitioners rated on-the-job re-training for new roles and duties as significantly more important than did educators.

### Redesigned Roles

There were only two significant differences when the incentives in the redesigned work roles categories were compared by age group and job function group. The late career and retirement eligible age groups rated transition to a staff development or student teaching role as less important than respondents in the early and mid-career age groups. Practitioners rated assignment to special testing areas as more important than administrators. All mean ratings in this category were less than 3.5.

### Recognition

Formal recognition for length of service was rated as highly important ( $\geq 3.5$ ) only by early career respondents. They considered it significantly more important than respondents in the late career and retirement eligible age groups. There were no differences in importance ratings among job function groups.

### Personal motivators

Mean importance ratings of the personal motivators are reported in Table 3. The ranking of mean importance ratings for total respondents in descending order were

- benefits
- additional income
- personal fulfillment
- keeping mentally alert
- keeping physically busy and active
- dedication to clinical laboratory profession
- loyalty to current employer

All but loyalty to current employer had mean importance ratings of  $\geq 3.5$ .

Comparisons of ratings across age groups and job function groups are reported in Tables 3 and 4, respectively. Retirement-eligible employees ranked keeping mentally alert, dedication to the laboratory profession, and keeping physically active as top personal motivators for remaining employed past retirement eligibility. Late career employees cited benefits, personal fulfillment, and keeping mentally alert as top personal motivators. For both mid-career and early career

professionals, benefits, additional income, and personal fulfillment were ranked most highly.

The age group of retirement-eligible employees gave significantly lower mean importance ratings to benefits and additional income than did other age groups. Early career employees rated additional income as significantly more important than did late career individuals. There were no significant differences among job function groups on any of the personal motivators.

### DISCUSSION

Several major themes emerged from this study. First, benefits and compensation along with the opportunity for part-time employment are key incentives for retaining CLP past the time of retirement eligibility. The most important incentive factor for the respondents across age groups and job functions was full health insurance and other benefits for part-time employees. Longevity pay increases/bonuses and increased employer contributions for retirement appeared as the second or third factors cited by all age groups. The ability to work part-time was rated as 4<sup>th</sup> in importance by the overall group and by all age groups. A personalized nontraditional schedule was also cited by each age group as important. Many of these key incentives are determined by institutional policy and may not be under the control of an employee's direct supervisor. The results of this study should help laboratory managers make the case to higher level administrators that enhanced benefits, part-time work, or personalized alternative schedules will help retain valuable employees.

The emphasis on benefits and compensation as retention incentives for CLP is consistent with the uncertainty in the general population about adequacy of retirement resources as documented by the Pew Research Center and Retirement Confidence Survey.<sup>2,4</sup> Compensation was also cited by nurses as a factor related to remaining in the workforce.

A second theme that emerged is that age/career stage matters. Respondents rated the importance of the incentives for remaining in the workforce differently depending on their career stage. The retirement eligible group of CLP had the lowest mean importance ratings on several incentives (more or longer breaks, increased

employer contribution to retirement, longevity pay, support for care-givers, formal recognition, and all education and training incentives). This oldest group was also less motivated by benefits and additional income. It was interesting to note that the retirement eligible group did not rate increased paid time off for workers over 50 as important (rated < 3.5). Keeping mentally alert and dedication to the laboratory profession were ranked highest by this group of respondents as their personal motivators for working past retirement eligibility. The members of this age group appear to have internal motivators that result in a commitment to their jobs irrespective of the more external factors such as benefits and compensation assessed in this study. Proximity to Medicare-eligibility and personal and spousal retirement benefits are likely to play a large role at this career stage. Retirement eligible workers appear likely to respond differently to various incentives than their coworkers.

On the other hand, younger respondents (early career age and mid-career groups) rated many incentives such as more or longer breaks, formal recognition, transition to staff development / teaching and all incentives in the education and training category significantly higher than older respondents. This is an important finding because many of these incentives such as formal recognition or management training are within the control of managers and could be more easily implemented than changes in benefits and compensation. There was only one incentive in which the mid-career (30 – 50 years of age) group differed significantly from the other age groups. The mid-career group rated support to reduce the burden of care-giving for dependents higher than the late career and retirement groups rated that incentive. Laboratory professionals in this age group may have dependent children and/or aging parents or foresee the need to take care of their parents in the future. Accommodating the need for flexibility and informational resources related to caregiving might be an important factor in retention for this age group.

A third theme of this study is that there are some differences in how CLP's view incentives to working past retirement based on their job function. The views of practitioners in this study differed from those of educators and administrators with respect to work place issues (more or longer breaks, comfortable rest and

break areas, and low levels of ambient noise, and readily accessible equipment to reduce reaching). Their ratings for those incentives were significantly higher than those of educators and administrators. Practitioners were also more interested in training for new roles and assignment to special testing areas than were educators or administrators. These incentives seem intuitively to be of more relevance to CLP at the bench in the clinical laboratory setting than they are to educators or laboratory administrators. Creating a menu of incentives that reflects these age-based and job function-based differences is likely key to successful strategic workforce planning and retention of CLP.

## CONCLUSION

To influence decisions about retirement, it is essential to know what employees value throughout their careers. This study detected differences in the retention incentives and motivators of CLP in different job functions and age groups. Clinical laboratory practitioners who were surveyed identified many practical workplace improvements that may influence their retention beyond retirement age. CLP in all work settings and all age groups identified benefits and compensation along with the opportunity for part time employments as key factors in the decision to work past retirement. The high level of importance placed on these retention factors by a large sample of CLP should help laboratory administrators advocate for these changes and benefits at the institutional level. The current shortage of CLP and an aging workforce provide the added motivation that institutions need to make workplace practice and policy changes to retain current employees.

Finally, this study shows the importance of timing retention incentives. The survey did not capture the views of CLP who had already retired and it is possible that some of those employees could have been retained with well-timed incentives. The study showed that younger employees view incentives differently than late career and retirement eligible employees. Investing in the incentives that younger CLP value may shape their views of the work they do today and create an environment that encourages working past the retirement age. To maintain adequate staffing levels for the coming decades, it will be imperative to initiate changes and strategic workforce planning now.

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