

## Rural Capacity Investment Fund (RCIF)

In 2022, Alberta Health Services (AHS), Covenant Health, Lamont Health Care Centre, the Bethany Group (Camrose) and the United Nurses of Alberta (UNA) agreed to create the Rural Capacity Investment Fund (RCIF) Committee.

The RCIF's mandate was to support retention, recruitment, and relocation initiatives to grow capacity and nursing staff at rural sites.

Between April 1, 2022, and March 30, 2024, annual funding was available to sustain the workforce in the North, Central and South Zones that are difficult to recruit. *(Those in the Calgary and Edmonton Zones are not eligible)*

- \$10 million is available to support retention and recruitment initiatives
- \$5 million is available for relocation assistance

### ALLOCATION BREAKDOWN

Funding Category	Allocated (Not actual spend)
2022 Retention Payment	\$4,860,000.00
Relocation Expense Reimbursement	\$2,130,000.00
Relocation Incentive	\$5,910,000.00
Mileage	\$1,717,000.00
Individual Tuition	\$ 164,662.67
Professional Development	\$ 186,986.86
Project Initiatives	\$ 1, 256,390.33

## RETENTION FUNDING

### 2023 RETENTION PAYMENT

- In May 2023, \$4.86 million was disbursed as a lump sum retention payment to all UNA employees in AHS, Covenant Health, Bethany(Camrose), and Lamont in the North, Central, and South Zones.
- Eligible employees were those who worked between April 1 - December 31, 2022, and who were still employed as of February 17, 2023

- Amount per hour 57 cents

## **Employee Survey Summary**

### **Compensation and Benefits:**

- Recommendations to tie compensation to years worked in rural areas.
- Proposal to extend travel funding to all nursing staff, regardless of distance travelled.

### **Process Improvements and Efficiency:**

- Requests for simpler application processes and extended time frames for incentives.
- Desire for increased education and specialization opportunities in rural nursing.
- Requests for streamlined processes and easier access to funding applications.
- The desire for funds to be distributed separately from regular paychecks.
- Requests to simplify the application process and improve communication about available funding.
- There is a desire for a more accessible and user-friendly process.
- Recommendations to streamline the application process and improve tools like the iExpense tool.
- Frustration was expressed over glitches in the online form.

### **Communication and Awareness:**

- Concerns about insufficient communication and awareness among staff regarding available funding and benefits.
- Suggest enhanced advertising and communication channels to ensure all eligible staff are well-informed.

### **Fair Allocation and Transparency:**

- Appeals for fair distribution of resources and transparency in the selection process.
- Recommendations to involve frontline staff in decision-making and allocation of funds.
- Concerns were raised about fairness in the allocation process.
- Calls for exceptions for unique roles in rural areas to receive retention bonuses.
- Employees expressed confusion or need to understand the funding process and criteria more.
- Requests for clearer explanations of how funds are allocated and determined.

### **Retention and Recognition:**

- Emphasis on acknowledging and retaining experienced staff.
- Suggestions for permanent incentives and larger bonuses to boost staff retention.

### **Management and Accountability:**

- Calls for accountability in budget spending and management decisions.
- Suggestions to involve managers and departments in the decision-making process.

### **Awareness and Communication:**

- Some employees were unaware of the funding until it appeared in their pay stubs.
- Lack of communication from the union or regulatory bodies led to missed opportunities for some employees.
- Recommendations for improved advertising and communication to ensure all eligible employees are informed.

### **Compensation and Incentives:**

- Suggestions to increase funding, especially for hard-to-hire rural areas.
- Calls for tax exemptions on payments and consideration of additional incentives like increased pay or vacation accrual.

- Recommendations to increase funding, make it tax-free, and ensure accessibility for all rural workers.
- Suggestions for additional perks such as more vacation hours, education funding, or lump sum payments.

**Regional Equity and Support:**

- Concerns about disparities between regions and provinces in funding and support.
- Suggestions for offering incentives specifically for ER staff and EMS workers.

**Recognition and Appreciation:**

- Emphasis on recognizing long-standing staff with increased incentives.
- Concerns about fairness in distribution between new hires and existing staff.

**Retention Strategies:**

- Ideas for ongoing incentives, yearly raises, or separate bonus checks.
- Recommendations to prioritize retention efforts over recruitment.

## PROJECT INITIATIVES

In November 2022, the RCIF Committee launched an application for worksites in the North, Central and South Zones to submit applications for retention and recruitment initiatives to grow capacity and nursing staff.

### Outcomes:

- 241 applications were received
- 114 applications requested retention and recruitment bonuses. In response, the committee implemented the relocation incentive to address recruitment bonus requests and the 2022 Retention Payment to address retention bonus requests
- 41 project applications were approved
- \$1,256,390 million was allocated

### Summary of Survey (2 responses)

- **Limited Impact on Retention and Recruitment:** While initiatives boosted morale, they didn't significantly affect retention or recruitment efforts. There's a need to address underlying issues causing nurses to leave for urban centers, suggesting a need for reevaluation or additional strategies.
- **Skill Enhancement and Morale Boost:** Initiatives like ACLS training positively impacted skill development and boosted morale among nurses. Such opportunities for skill development and team engagement are crucial for employee satisfaction and engagement.
- **Continued Support for Mileage Reimbursement:** Employees emphasize the importance of continuing mileage reimbursement programs, especially in rural areas. Considering significant commuting distances, financial support for travel expenses is vital for retaining staff.
- **Advocacy for Long-Term Wage Increase in Rural Areas:** Employees advocate for permanent wage increases for rural workers. This reflects a need for sustained support rather than one-time funds to attract and retain staff in these locations.
- **Streamlining Expense Reimbursement Process:** There's a call for a more accessible and efficient fund access process. Simplifying reimbursement procedures can alleviate challenges associated with upfront costs, making it easier for employees to access funds.

### Final report feedback from managers on the impact of funding (12 responses)

- The feedback from staff members regarding the educational opportunities provided by the organization is overwhelmingly positive. Many staff members expressed enthusiasm about the opportunity and indicated that it made them feel valued and competent. The initiative increased morale, showed management support, and enhanced staff skills. It also positively impacted teamwork and cohesion within teams.
- Although no concrete data on retention and recruitment was collected, anecdotal evidence suggests that nurses within the facility are grateful for the opportunity and feel supported by management. The funded courses incentivized staff to continue working at the organization.
- The focus is on optimizing education to increase staff engagement and comfort in a rural setting with limited educators available. The organization aims to provide ongoing development opportunities, especially for seasoned staff, to demonstrate appreciation and improve the quality of care provided to the senior population. Overall, the initiative has been well-received and is seen as a positive step towards enhancing the workplace culture and staff satisfaction.

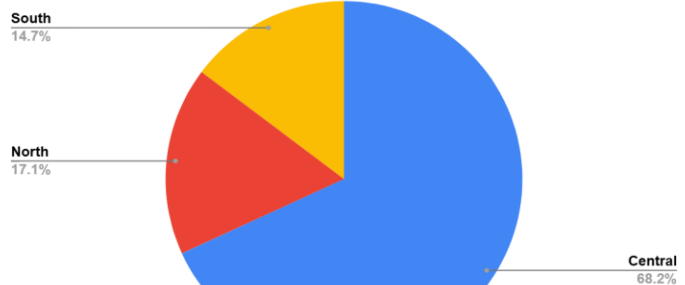
## MILEAGE FUNDING

- **Project Timeline:** July 1, 2023 -February 29, 2024
- **Eligible Sites:** Rural and Remote Worksites within the North, Central or South Zones
- **Eligible Employees:**
  - Permanent and Temporary employees who are Casual, Benefit-Eligible Casual, part-time and full-time employees part of the UNA bargaining unit and employed by AHS, Covenant Health, Lamont or the Bethany Group (Camrose)
- **Maximum amount per employee:** \$1000/month
- **Min mileage:** Employees had to live a minimum of 50km one way from their worksite

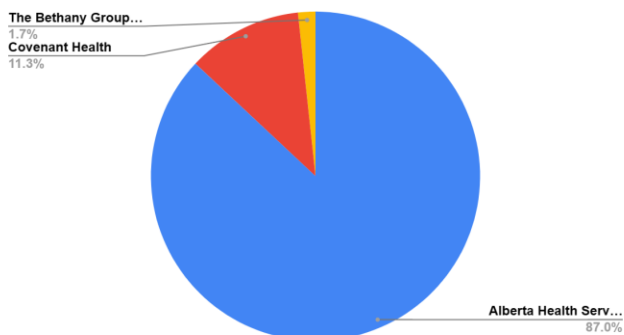
### Allocated \$1.717 million

- 359 applications
- 293 approved
- 66 declined

#### HEALTH ZONE



#### MILEAGE FUNDING BY EMPLOYER



## Summary of Survey

### Managers (11 responses):

- **Limited Utilization and Mixed Impact on Retention:** While funding provided additional incentives to work and improved coverage, there needed to be more certainty about its impact on retention. Some employees utilized the funding, while others did not, and despite its availability, some still left their positions.
- **Qualification Limitations and Disparity:** Not all employees qualified for the reimbursement or incentive, leading to frustration and tension among staff members. The disparity in eligibility caused dissatisfaction, especially when only some employees received benefits.
- **Recognition of Commitment and Appreciation for Benefits:** Despite limitations, employees felt valued for their commitment to commuting to rural areas for work and appreciated the recognition of their efforts. Eligible employees expressed gratitude for benefits like mileage reimbursement.

- **Desire for Retention Bonuses and Equality in Benefits:** Employees desired long-term incentives and retention bonuses to encourage staff to stay in their positions. They also preferred equality in benefits, suggesting a desire for fairness and consistency in reward distribution.
- **Support for Expanded Reimbursement and Streamlined Process:** Employees supported expanding reimbursement options beyond mileage and suggested streamlining the process for accessing funds. There was a call for more comprehensive support and efficiency in reimbursement procedures.

**Employees (46 responses):**

- **Financial Relief and Motivation for Work:** The reimbursement for commuting expenses provided significant financial relief for employees and motivated them to continue working in rural areas or pick up more shifts, thereby improving retention and staffing coverage.
- **Support for Continuing Education:** Employees appreciated the reimbursement for mileage as it encouraged them to pursue further education or training courses, demonstrating the value of financial support for professional development.
- **Impact on Work-Life Balance:** By covering commuting costs, the reimbursement helped employees maintain a better work-life balance, reducing stress and allowing them to focus on their work without worrying about transportation-related financial burdens.
- **Influence on Commuting Decision and Retention Factor:** The availability of mileage reimbursement significantly influenced employees' decisions to commute long distances to work. It served as a retention factor, preventing them from considering leaving their positions due to financial constraints.
- **Desire for Additional Incentives and Streamlined Processes:** Employees expressed a desire for additional incentives such as signing bonuses, paid travel time, annual appreciations, and continuation of reimbursement programs. They also emphasized the importance of streamlined processes for accessing funds, including clear instructions, faster processing, and user-friendly

## EDUCATION AND PROFESSIONAL DEVELOPMENT

### Individual Application

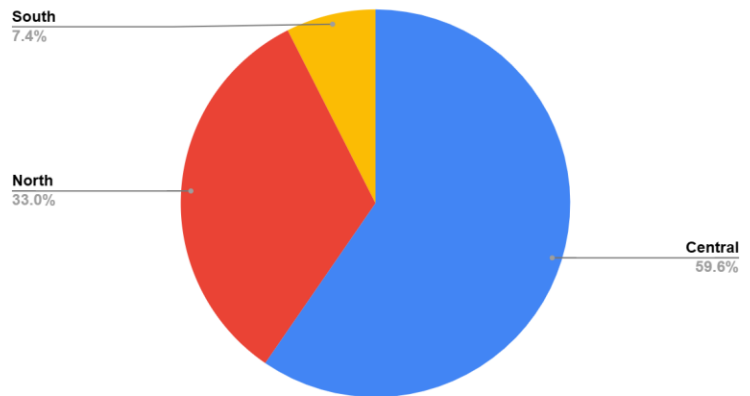
#### Eligible Employees

- Eligible employees had to work in a rural or remote worksite within the North, Central or South Zones (Calgary and Edmonton Zones **excluded**) Urban sites within the three zones were **excluded** (Fort McMurray, Grande Prairie, Red Deer, Medicine Hat, Lethbridge)
- Maximum of **\$5000 per employee**

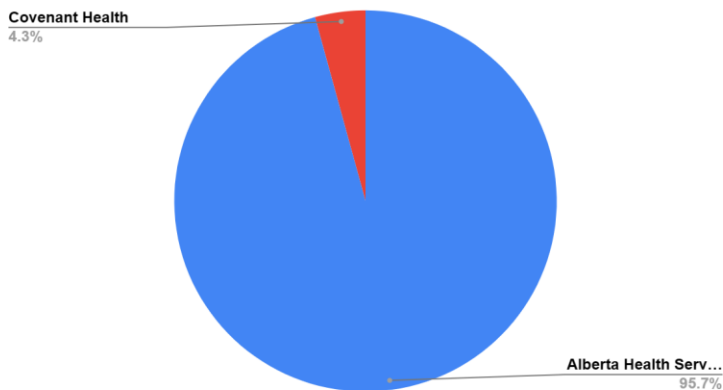
**\$164,162.67 allocated**

- 125 applications
- 95 approved
- 31 declined

#### HEALTH ZONES



#### EMPLOYER



### Summary of Survey

#### Managers (6 responses):

- Support for Career Advancement: The incentive was appreciated for supporting employees, such as single mothers, in furthering their careers. It facilitated access to educational opportunities and helped individuals advance professionally.
- Educational Opportunities and Subsidized Education: Employees benefited from increased education subsidies, enabling them to pursue educational goals like completing a Master's degree. The incentive reduced the financial burden of higher education, making it more accessible and affordable.

- **Uncertainty Regarding Decision Influence:** There is uncertainty about whether the reimbursement significantly impacted individuals' decision-making processes. This indicates ambiguity regarding the incentive's influence on their decisions.
- **Feeling Supported and Enhanced Employee Satisfaction:** The incentive contributed to employees feeling more supported and satisfied. It fostered a sense of belonging and appreciation within the organization, positively impacting morale and engagement.
- **Return for Service Funding for Rural Locations and Stipends for Ongoing Education:** There is a trend towards providing a return for service funding for rural locations and stipends for ongoing education, such as attending conferences. These initiatives aim to attract and retain staff, support continuous learning, and invest in employees' professional development.

**Employees (9 responses):**

- **Financial Support for Certification and Education:** Employees value financial support, such as the RCIF, for pursuing certifications and additional education. This support helps alleviate financial burdens and facilitates ongoing professional development.
- **Challenges with Payment Process:** Some employees needed help with the payment process, detracting from their overall experience with the incentive program. Streamlining the process could improve effectiveness and perceived value.
- **Renewed Passion and Excitement for Job:** Education renewal opportunities reignite passion and excitement for employees' jobs. Investing in education and professional development positively impacts engagement and satisfaction.
- **Enhanced Knowledge and Confidence:** Access to educational resources contributes to employees' professional growth and confidence in their abilities.
- **Personal Fulfillment and Career Aspirations:** Employees desire education beyond job requirements, driven by personal fulfillment and long-term career goals. Supporting employees in pursuing aspirations enhances job satisfaction and retention.
- **Desire for Continued Education Funding and Streamlined Processes:** Employees seek ongoing funding and streamlined processes to access incentives, emphasizing the need for continued support and ease of use in education and certification programs.



## PROFESSIONAL DEVELOPMENT

- The training was targeted toward **UNA member's** professional development
- The intent is to collaborate with other worksites to accommodate as many nurses as possible and to ensure shifts are covered
- Approval amounts: up to a max of **\$10,000 per training program**

### Eligible Sites

- Rural and remote worksites with the North Central and South Zones
- **Excluded:**
  - Urban Sites within the North, Central and South Zones (*Fort McMurray, Grande Prairie, Red Deer, Medicine Hat, Lethbridge*)
  - Calgary and Edmonton Zones

### **\$186,986.86 was allocated**

- 26 applications received and approved
- 1500+ employees were reached

### **Summary of Survey Results: (1 response)**

- **Positive Teamwork and Collaboration:** Employees are satisfied with working together, reflecting a supportive work environment and positive team dynamics. This trend suggests that teamwork is highly valued and contributes to overall job satisfaction and productivity.
- **Desire for Increased Educational Opportunities:** Employees need more chances to engage in learning and development activities within their organization. This indicates a recognition of the importance of ongoing education and professional growth for career advancement and job satisfaction.
- **Simplicity of the Process:** The process was straightforward, indicating a positive perception of accessing benefits or resources. This trend suggests that simplified processes contribute to overall satisfaction with organizational procedures.

# RELOCATION

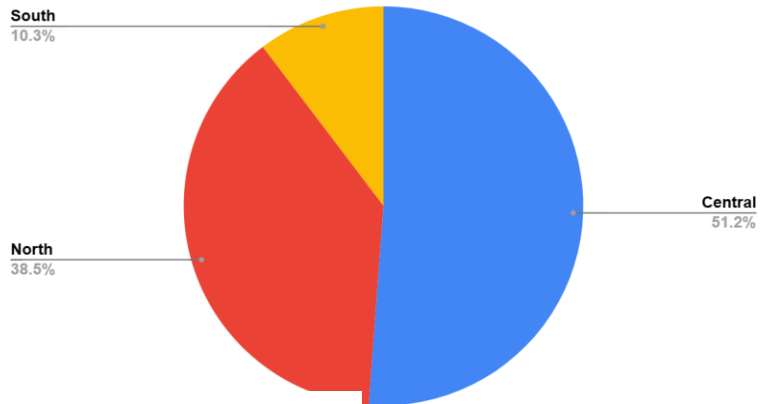
The funding period was from April 1, 2022 – March 30, 2024

- October 2022: Launch of Relocation Expense Reimbursement opportunity
- February 2023: Launch of Relocation Incentive opportunity

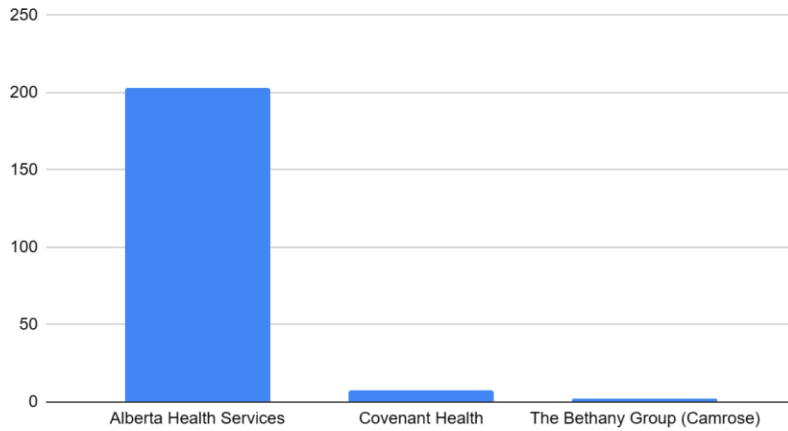
## RELOCATION EXPENSE REIMBURSEMENT

- \$2.13 million has been allocated
- 353 applications
- 213 approved
- 140 declined
- 95 employees received both relocation expense reimbursement and incentive

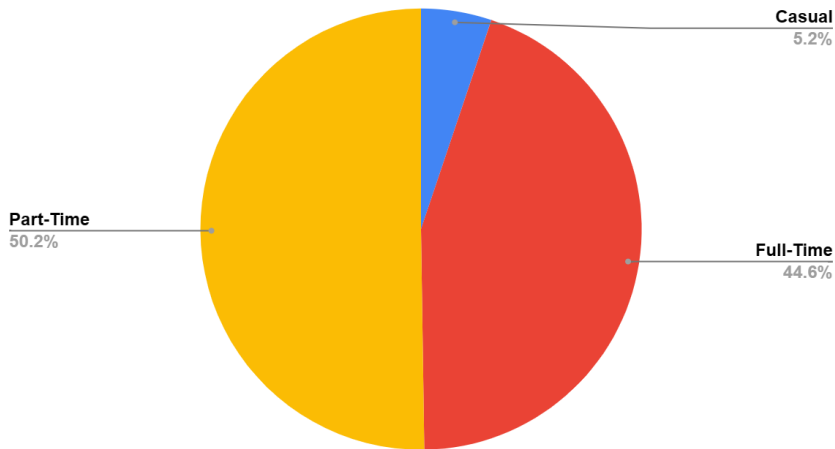
### HEALTH ZONE



### EMPLOYER



## FTE STATUS



### Summary of Survey

#### Managers (12 responses):

- **Limited Impact on Long-Term Retention:** Despite appreciation for incentives, concerns persist regarding their effectiveness in long-term employee retention. Loyalty is shifting towards individual interests rather than organizational allegiance, with factors like unit culture and work environment seen as more influential in retention.
- **Mixed Responses on Expense Submission:** Some employees needed help submitting proof of expenses, leading to challenges in the reimbursement process. This suggests a need for smoother implementation and clearer guidelines to streamline expense submission.
- **Incentive for Relocation from Other Provinces:** The incentives effectively encouraged staff from other provinces to relocate, indicating their success in facilitating inter-provincial recruitment efforts.
- **Mixed Impact on Work Environment:** While financial incentives may attract employees, they may not address underlying workplace issues. Some employees express that the incentive did not alleviate the stressors of the current work environment.
- **Desire for Additional Recruitment and Retention Incentives:** There's a call for more incentives to recruit and retain staff. Suggestions include education benefits, improved benefits packages, and incentives for local talent retention, indicating a need for comprehensive strategies beyond financial incentives.

#### Employees (21 responses):

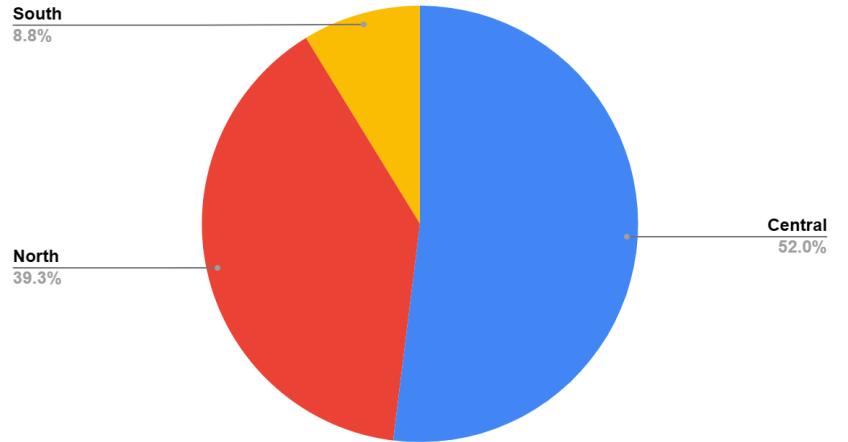
- **Facilitating Job Transition:** The RCIF program is seen as instrumental in easing the transition to a new job, providing financial assistance that makes relocation more feasible and motivating individuals to accept job offers in different cities.
- **Support for Newcomers and Families:** The program is particularly beneficial for newcomers and individuals with families, alleviating the financial burden of relocation and making the transition smoother for employees and their families.
- **Appreciation for Reimbursement and Feeling Valued:** Many express gratitude for the reimbursement provided by the program, feeling respected and valued in their current roles. This appreciation motivates them to continue performing diligently.

- **Future Opportunities Influence Decision:** Some individuals consider future opportunities when deciding whether to stay or leave after the Return-for-Service period. Career growth, job prospects, and personal circumstances significantly influence their decision-making process.
- **Retention Incentives and Improved Compensation:** Employees advocate for various retention incentives, such as periodic bonuses and allowances, as well as improved compensation and benefits. These measures can contribute to higher retention rates and overall satisfaction among employees.

## RELOCATION INCENTIVE

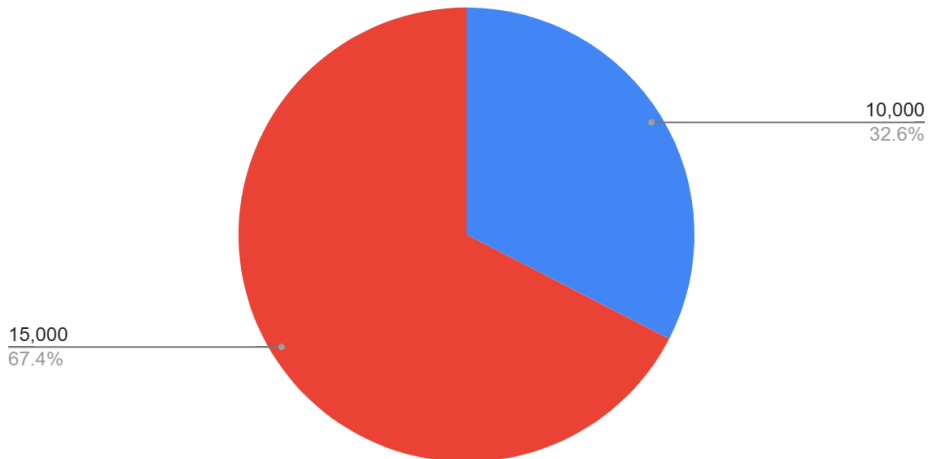
- \$5.910 million has been allocated
- 574 applications
- 443 approved
- 132 declined

## HEALTH ZONE

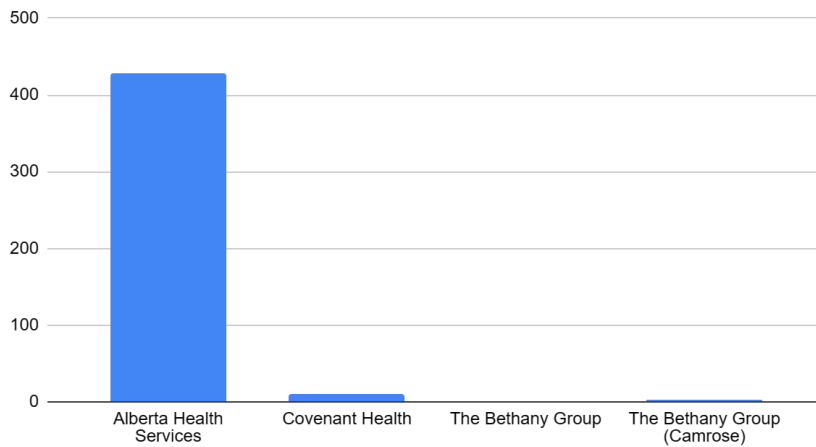


## RETURN-FOR-SERVICE

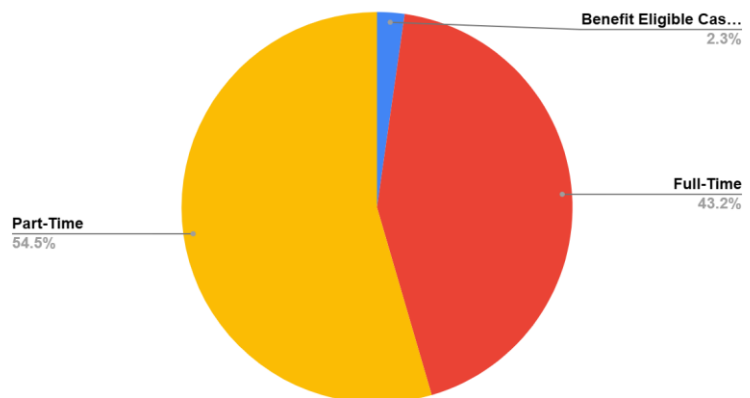
Urban - \$10,000 Rural \$15,000



## EMPLOYER



## FTE STATUS



## Summary of Survey

### Managers (49 responses):

- **Effectiveness of Incentive Programs:** The incentive programs were effective in recruitment and retention, particularly for nurses, by providing financial support and easing relocation.
- **Taxation Concerns:** There were concerns about the tax implications of incentive funds, with suggestions for tax-free payments or separate payment methods.
- **Personal and Familial Factors in Relocation:** Employees often relocate for personal reasons, such as family ties or pre-existing intentions, highlighting the importance of personal connections in relocation decisions.
- **Challenges in Retention and Comprehensive Support:** Historically, retaining staff in remote locations has been difficult, and comprehensive support beyond financial incentives, including assistance for spouses and longer orientation periods, is needed.

- **Perceptions of Fairness and Equal Treatment:** There were concerns about perceived unfairness and unequal treatment among long-term employees, negatively impacting morale and team dynamics.

**Employees (64 responses):**

- **Financial Support and Influence on Decision-making:** The relocation incentive played a significant role in decision-making by providing financial relief and support for moving expenses, making accepting positions more feasible for many individuals.
- **Mixed Experiences and Satisfaction Levels:** While some participants found the incentive helpful, others expressed dissatisfaction with its implementation, including timing, taxation concerns, and discrepancies in the process.
- **Personal and Career Considerations:** Factors such as family situation, career plans, and personal reasons for rural living influenced decisions, with the incentive providing additional support or reassurance for these choices.
- **Work Environment and Management:** The quality of the working environment, including competent management and supportive colleagues, emerged as crucial factors influencing decisions to remain in positions.
- **Retention Focus and Community Engagement:** There was an emphasis on retention strategies, including ongoing support for existing staff and community engagement activities to improve rural areas' overall quality of life.