CapitalNurse   
Internal Transfers – Best Practice Guidelines

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# Internal Transfer Process

## What is an internal transfer opportunity?

An internal transfer provides a member of staff with the opportunity to move within an organisation or across organisational boundaries without completing a lengthy application process. It can be one of the outcomes of a career clinic. It is offered as a development opportunity for nursing staff which also helps retention and engagement.

## Who are internal transfers intended for?

All nursing staff including:

* Bands 2-4 healthcare assistants and support workers
* Band 4 registered nursing associates
* Bands 5-8 registered nursing staff/healthcare professionals (HCP)

An internal transfer offers the opportunity for movement within an organisation and within a specific pay band. It may also be offered for staff wishing to develop experience in a particular area at a lower pay band.

## Pre-requisites

* Minimum of six months’ experience in current role and no ongoing HR issues.
* Satisfactory completion of probation period for new employees.
* Newly registered nurses/healthcare professional must have completed their preceptorship period successfully.
* Prior discussion with line manager and/or participation in the organisation’s career clinic programme
* There must be a vacancy in the proposed area at the same or a lower pay band

## Process

The following process is intended as a guide only and will depend on each organisation’s individual requirements. A flow chart is also included.

**Step One:** Nurse/healthcare professional expresses interest in transferring to another department and discusses with current manager. At this stage, the nurse/HCP may complete a form to register their expression of interest in a transfer. A sample form is included in Appendix One. This may be facilitated through the Career Clinic programme  
  
**Step Two:** Nurse/HCP identifies opportunity or area and arranges discussion with the manager of that area.

**Step Three:** Nurse/HCP completes application form which must be approved by current manager prior to submission. If the application is not approved, the current manager must provide feedback with adequate reasons. A sample form is included in Appendix Two.

**Step Four:** Application is reviewed by new manager and decision made. Where an affirmative decision is made, HR will be advised and any required checks will be carried out. When the decision is negative, a feedback session will be conducted with the Nurse/HCP.

**Stage Five:** Notice period and transfer / start dates will be agreed between current manager, new manager, HR and the nurse/HCP. A confirmation form is completed and a sample form is included in Appendix Three. A confirmation email is sent to the nurse/HCP and a sample email is included in Appendix Four.

The following model provides an overview of the process:

## Promotion of programme

The internal transfer scheme should be promoted as part of the Career Clinic Programme within organisations. Promotion depends on setting and could include:

* Email
* Intranet
* Printed flyers in clinical settings / lifts / corridors
* Career days or events
* Appraisals
* Visit to clinical areas
* Preceptorship and other study days
* Team / department meetings
* Senior nurse forums
* Team brief – cascade system

## Evaluation

Best practice would include evaluation after six months and metrics could include:

* Applications received and level of interest
* Internal transfers (as a result of career clinic) with percentage
* Staff staying in own role
* Staff staying in own department in different role
* Staff leaving organisation (with destination)
* Staff leaving nursing
* Job satisfaction (assessed at outset and after six months)

In addition, the employee may want to complete a reflection on their experience of the internal transfer process. A sample form is included in Appendix Five.

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The following are draft sample templates for an internal transfer with an organisation

# Appendix One - Expression of Interest

|  |  |
| --- | --- |
| Name of nurse/HCP: |  |
| Name of manager: |  |
| Name of department |  |
| Current role: |  |
| Length of time in current role: |  |

|  |
| --- |
| Reasons for Transfer: |
| Areas of interest: |
| Skills / knowledge / experience: |
| Areas of interest: |
| Comments / Notes: |

|  |
| --- |
| Nurse’s/HCP’s Signature: |
| Manager’s Signature: |
| Date: |

# Appendix Two - Internal Transfer Application Form

|  |  |
| --- | --- |
| Name of nurse/HCP: |  |
| Role: |  |
| Department: |  |
| Banding: |  |
| Proposed start date: |  |

|  |
| --- |
| Information about role: |
| Specific requirements (incl knowledge, skills, experience) |
| Comments / Notes: |
| Nurse’s/HCP’s Signature: |
| Manager’s Signature: |
| Date: |

# Appendix Three - Internal Transfer Confirmation

|  |  |
| --- | --- |
| Name of nurse/HCP: |  |
| Name of previous manager: |  |
| Previous department: |  |
| End date: |  |
| Exit interview conducted: |  |
| Name of new manager: |  |
| Role: |  |
| Department: |  |
| Confirmed start date: |  |
| Development plan / training needs: |  |

# Appendix Four – Confirmation Email

The following is a sample email that may be adapted for each organisation’s own needs to confirm the transfer with the individual:

Dear xx,

Further to your transfer meeting with (name, role and department), I am pleased to confirm that your transfer to (position and department) has been agreed.

Following agreement between your existing and new line managers, your start date will be (start date). Please report to (name, role and department) on (time and date).

Your salary will be your existing rate of pay (confirm payband and salary). All other terms and conditions remain the same.

Finally, I would like to take this opportunity to congratulate you on your transfer and wish you every success in your new role.

Yours sincerely

# Appendix Five - Internal Transfer Reflection

Using the Rolfe et al model, reflect on the main learning from the internal transfer process, how this has felt and how it will influence your future practice:

|  |  |
| --- | --- |
| WHAT? |  |
| SO WHAT? |  |
| NOW WHAT? |  |