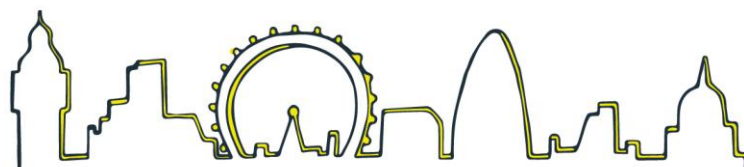
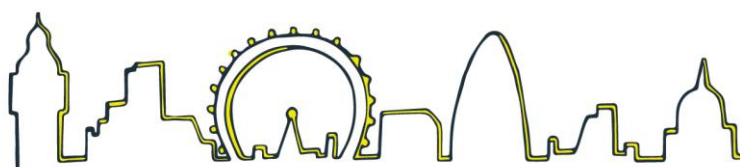


# Career clinics and internal transfers report and best practice guidance



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## Executive Summary

This project has focussed on the area of career clinics and internal transfer schemes within London following research conducted by Middlesex University in 2019-2020.

The conclusions identify the critical success factors for a successful programme and the best practice guidelines for organisations.

## Terms of Reference

The CapitalNurse project was established to explore the different programmes in use for career clinics and internal transfers, their benefits and challenges, for both individuals and employers, to support organisations to offer career clinics to their nursing, and potentially to work collaboratively across organisational boundaries.

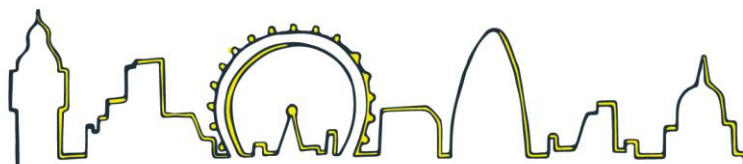
The objectives of the project were to:

- Provide clear definitions of career clinics and internal transfer schemes;
- Identify recommendations for programmes;
- Best practice guidelines for CapitalNurse programme;
- Develop resource packs to support the roll-out of programmes within organisation.

The output includes best practice guidance and resources to be shared with stakeholders to support organisational programmes.

## Background

In 2018 CapitalNurse undertook a survey of London NHS trusts asking about the implementation of career clinic and internal transfer schemes. Ten employers in the capital responded and nine of these said that they ran such a scheme. Seven indicated willingness to be involved in a further evaluation. Some have been subject to internal evaluations. All respondents to that survey stated that their schemes



aimed to increase retention within their trusts and to increase awareness of internal development opportunities.

Middlesex University were commissioned to undertake further research in 2019. They undertook a scoping exercise to explore the existing schemes in London and to categorise these by model. The objectives of their research included:

- Quantify and describe user engagement with the different schemes in place;
- Identify the impact on retention of nursing staff;
- Identify the impact on job satisfaction and their level of satisfaction with the scheme;
- Compare the impact of different models.

## Methodology

Following the CapitalNurse survey in 2018, Middlesex University carried out more detailed evaluation of the scheme with eight trusts representing different areas of London.

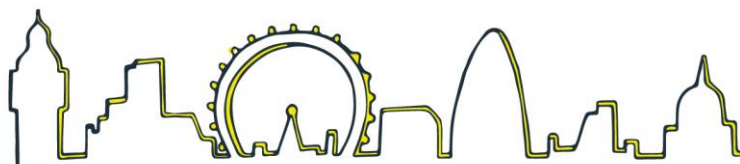
The participating regions included trusts in north central London, north west London, south east London and south west London. The majority of these were acute trusts, however integrated and specialist trusts were also represented. Nine interviews were held with the trust leads.

In addition, a survey was sent out to nurses.

## Findings

The survey received 88 responses and of these 81 nurses were still in full time employment.

Of these 81 nurses were still in full time employment. The majority of respondents were nurses in bands five and six although there was representation from all bands. Most had been with their organisation for between one and five years.



Overall 68% had engaged with a transfer scheme however there was some confusion over transfer scheme vs career clinic. Some had engaged with both and some weren't certain which scheme they had participated in.

63% moved successfully within their trust, however 18% were blocked. Around 5% of respondents decided to stay where they were following their career conversations, whilst 3% took another development opportunity within their current role. A small percentage had not made a decision and around 3% were still planning to leave their current position.

Overall 79% of respondents claimed that their job satisfaction had increased. Of the others, 4% claimed that jobs satisfaction had decreased and the others confirmed there had been no change in their job satisfaction as a result of their engagement with the career clinic

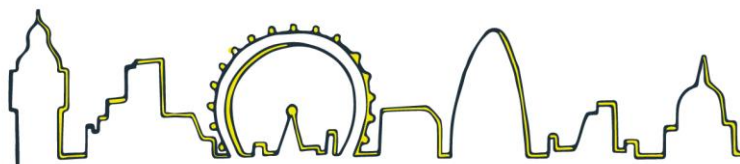
Whilst 63% are more likely to stay with their employer, around 7% are seeking opportunities with another employer and 8% has claimed it made no difference to them.

When asked about the benefits of the scheme, the following was provided:

- I can move to another areas without the lengthy application process – 22%.
- The person running the scheme is approachable – 17%.
- I could talk to someone in confidence – 12%.
- I can get to know about vacancies and opportunities in my trust in one place – 12%.
- The person running the scheme is knowledge and experienced – 11%.
- It was held at a location convenient to me – 8%.
- It was held at a time convenient for me – 7%.
- Getting general advice / counselling – 6%.

Findings from the interviews with trust leads identified the following:

- Organisations took different approaches to engage with nurses to facilitate access;
- There was a mixture of nurses / bands engaging with scheme. Where rotation schemes exist, newly registered nurses were less likely to participate. There



were also problems in some areas with staff being able to leave the ward to participate in a career conversation;

- The scheme helped to identify problematic or unpopular areas;
- There was a balance of individual needs vs trust needs;
- Difference in pre-requisites for participation in the scheme. Some trusts have minimum time requirement in post (six or twelve months) prior to transfer;
- Some organisations provided coaching training to volunteers to act as Career Facilitators to support initiative.

There were variations in the schemes that trusts offered, although there were some similarities. These included the overall scheme management as different trusts had different leads with some working in HR (recruitment and retention), others in education, workforce or in nursing practice education. The level of resourcing differed according to each organisation and a lack of administrative support was cited as a problem.

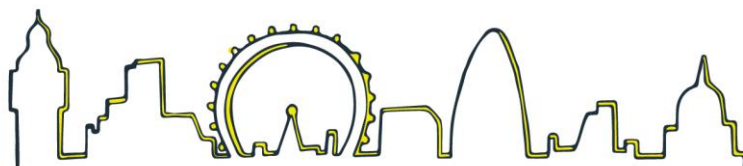
Whilst some programmes were strategic and led by values, others were pragmatic and driven by vacancy.

The intended participants varied according to the schemes with some open to all levels of nursing (including healthcare assistants) others were available for specific bands only. There were variations in the preparation for a career clinic and the available development for scheme leads. Frequency varied according to trust and depending on resources with some trusts holding weekly career clinics, others bi-monthly and others three times per year.

## Conclusions

The research demonstrated that the benefits of career clinics and internal transfer schemes would have an impact on staff retention at the same time as individual motivation and job satisfaction.

The conclusions drawn from the research by Middlesex University indicated a need for a clear process with sufficient resourcing and senior management (board level) sponsorship. There was a need for a varied approach to the dissemination of



information to promote the programme which should be available to all nursing staff. Scheme leads needed to be approachable, knowledgeable and visible and ideally an identified specialist nurse with organisational responsibility for retention. Career clinics need to be flexible with a pragmatic approach to delivery and strategically sequenced to coincide with life events. The CapitalNurse Career Framework should be used by nurses for preparation and to underpin a scheme.

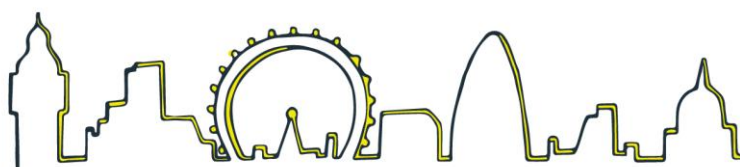
## Recommendations

Firstly, it is recommended that career clinic and internal transfer schemes should be available to all nursing staff of all levels including students. With consideration for widening participation, staff in other areas (for example, admin and clerical) may be included where there is an interest in pursuing a nursing role.

Secondly, it is recommended that there is a set of best practice guidelines for organisations to base their programmes. There should be a scheme lead in place however career conversations could be conducted by other people including practice facilitators, practice educators and career coaches. This also represents an opportunity to develop existing staff in coaching and facilitation skills to be able to conduct career conversations.

Thirdly, there should be clear boundaries for the career coach / facilitator recognising that they are not HR specialists and responsibility for career decisions and actions rests with the nurse.

Fourthly, resource packs should be available for nurses to prepare for their career conversation and for facilitators to use during the clinic. This can be supported with training / development which is accessible through self-directed learning package available through CapitalNurse.



## Best Practice Guidelines

The following best practice guidelines have been developed with the help of a steering group and through two stakeholder engagement events with stakeholders representing organisations in London.

### What is a career clinic?

A career clinic provides an opportunity for a member of staff to access a coaching conversation to explore opportunities for development, career moves and transitions.

### What is an internal transfer opportunity?

An internal transfer provides a member of staff with the opportunity to move within an organisation without completing a lengthy application process. It can be one of the outcomes of a career clinic.

### Who are career clinics 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

Additionally may include:

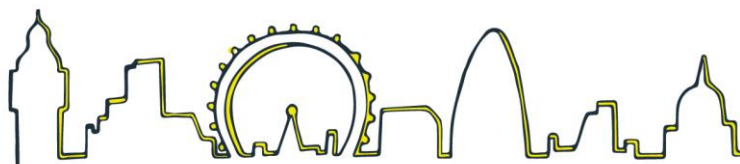
- Nursing students
- Other staff interested in moving to nursing roles

### Pre-requisites

- Minimum of six months' experience in current role and no ongoing HR issues.
- Completion of questionnaire prior to meeting is recommended and adds value.

### Frequency of career clinics

This should be determined by the organisation based on size and resources available. Career clinics should be available upon request.





### Management of career clinics

Career clinic lead with responsibility for managing the scheme with input from others including practice educators / practice facilitators / career coaches

### Promotion

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

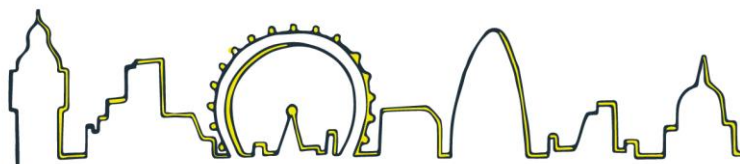
### Process

This will depend on organisation. Best practice includes:

- Charter to establish expectations and responsibilities
- Preparation material (i.e., Strengths, Learning Needs, Opportunities & Threats (SLOT) sent to individual which should be returned prior to the coaching session.
- Delegate to bring along relevant information to career clinic
- Career clinic with individual – individual to explore opportunities and evaluate options
- Follow-up email / telephone call two weeks later
- Follow-up six months later to evaluate

### Roles & Responsibilities

- All preparatory documentation completed by the individual is confidential and used only for the purpose of the career conversation
- Career conversation is confidential
- Career coaches or facilitators should not be involved in HR matters



- Career decision and associated actions remain the responsibility of the individual nurse

### Preparation for individual

- Completion of questionnaire prior to coaching session to assess strengths, learning needs and develop self-awareness
- Checklist of information to bring (CapitalNurse Career Framework)
- Willingness to participate in process and assume responsibility for exploring options and taking further
- Delegates to verbalise/sign an agreement to participate and own the process

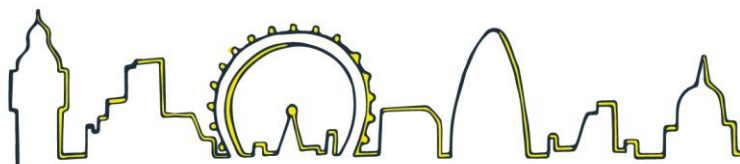
### Preparation for facilitator

- Knowledge of process and progression routes
- Knowledge of roles (job descriptions and person specifications) and bandings
- Awareness of opportunities within organisation and external (if appropriate)
- Understanding of how to facilitate a career conversation

### Evaluation

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

- Applications received and level of interest
- Conversations conducted
- Internal transfers (as a result of career clinic) with percentage
- External transfers (as above)
- 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)



## Resources

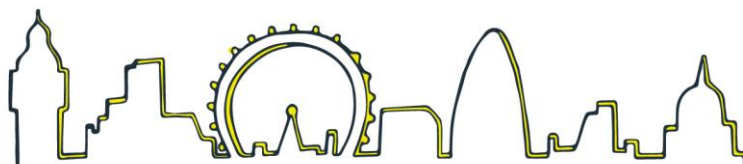
Two resources packs have been developed. The first one is aimed at the nurse to assist in preparation and includes:

- Information and a link to the CapitalNurse Career Framework Digital tool
- Six key questions – based on the CapitalNurse Career Framework
- SLOT analysis – to identify strengths, learning needs, opportunities and threats
- Current motivation / satisfaction questionnaire – to assess your satisfaction and motivation in different areas of your current role
- Conversation focus – to help you to identify what you would like to achieve from the conversation

The second one is aimed at the facilitator to help them prepare and manage a career conversation and includes:

- Tips for arranging and preparing for the conversation
- Managing the conversation
- Sample questions for the facilitator
- Closing and summarizing the conversation
- Follow-up

Additional resources are available on the HEE website and include a short workshop on facilitating a career conversation with slide deck, trainer guide and activities.



## Appendix One – Resource Pack for Nurse

The following information should be completed in advance of your career discussion and will be used to structure your conversation. It should be sent to the career facilitator beforehand and will help to focus the discussion upon your individual requirements.

This brief pack includes the following:

- Overview and a link to the CapitalNurse Career Framework Digital tool
- Six key questions – based on the CapitalNurse Career Framework
- SLOT analysis – to identify strengths, learning needs, opportunities and threats
- Current motivation / satisfaction questionnaire – to assess your satisfaction and motivation in different areas of your current role
- Conversation focus – to help you to identify what you would like to achieve from the conversation

During your career conversation, you should consider what you are looking for from your career over the next two - five years and what is important to you.

Remember this is your career and the facilitator is there to help you explore opportunities and to guide you.

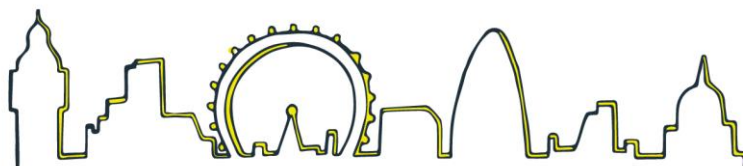
### CapitalNurse Digital Career Framework:

<https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/career-framework>

The CapitalNurse Career Framework is a digital tool to allow you to review and develop your career using self-assessment, reflection and feedback from service users and peers. Career conversations are built into the tool at different stages to guide you in relation to your current role and career development opportunities.

The tool is free-to-use and has been designed to advance a London-wide approach to career progression.

It is a self-assessment tool based on best nursing research, allowing trainee and registered nurses to measure and record your professional plan and to reflect on your skills. You can track your career progress online, choose to take feedback from peers and service users and explore your proficiency against nine domains, such as nursing practice, patient safety and teamwork.

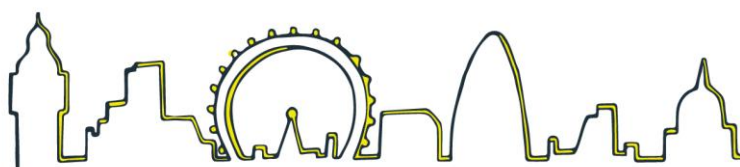


The tool helps you review progress, build your confidence and further career options. It can be used in career clinic sessions and is easy to upload for NMC revalidation.

A user guide for the tool is available and videos on how to use the career framework portal on the CapitalNurse Career Framework Page (see link above)

### Six key questions:

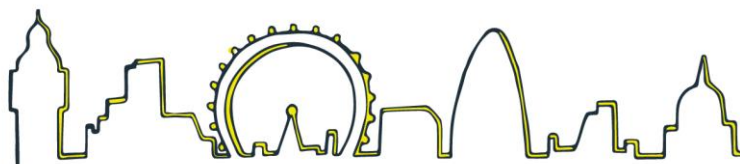
1	<b>How am I doing?</b> <i>Consider how you are getting on in your current role, what feedback you have received from others, what you enjoy doing and why you find challenging</i>
2	<b>How do I fit into the organisation?</b> <i>Consider your skills and any areas of special interest to you</i>
3	<b>What is expected of me?</b> <i>Consider the expectations of you in your current role and how you manage the expectations</i>
4	<b>What and how should I develop?</b> <i>Consider areas of special interest or roles that you would like to find out more about or develop</i>
5	<b>How will my talents and contributions be recognised?</b> <i>Consider how you will get feedback and how important it is to you</i>
6	<b>What is next for me?</b> <i>Consider areas you want to find out more about, roles that interest you and where you see your career going</i>



## Strengths, Learning Needs, Opportunities & Threat (SLOT) template

A SLOT analysis looks at an individual's current knowledge, skills and learning needs together with opportunities for development and threats.

<p><b>Strengths</b> (Knowledge, skills, experience, attitude)</p>	<p><b>Learning needs</b> (gaps in knowledge/skill, consolidation, required competencies, improvement areas)</p>
<p><b>Opportunities</b> (study days, on-the-job learning, observation, resources, e-learning)</p>	<p><b>Threats</b> (time, workload, funding, appropriate opportunities, attitude)</p>



## Current motivation / satisfaction

How would you describe your current levels in the following areas:

### Motivation at work

*Very high*      *High*      *Average*      *Low*      *Very low*

### Sense of job satisfaction

*Very high*      *High*      *Average*      *Low*      *Very low*

### Work and life balance

*Very high*      *High*      *Average*      *Low*      *Very low*

### Investment in professional development

*Very high*      *High*      *Average*      *Low*      *Very low*

### Ability to achieve personal goals

*Very high*      *High*      *Average*      *Low*      *Very low*

### Contribution to the success of the team

*Very high*      *High*      *Average*      *Low*      *Very low*

### Ability to build positive relationships and professional networks

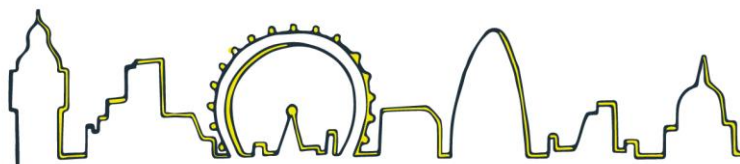
*Very high*      *High*      *Average*      *Low*      *Very low*

### Opportunity to work innovatively

*Very high*      *High*      *Average*      *Low*      *Very low*

### Ability to provide excellent care for patients / services users / clients

*Very high*      *High*      *Average*      *Low*      *Very low*

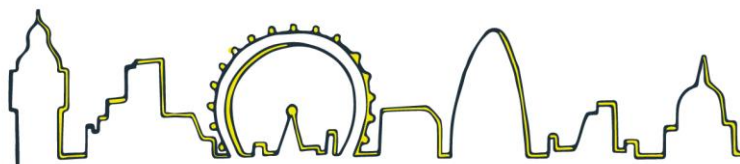


### Career conversation focus

What would you like to get out of your career conversation? Please tick those that are most important to you:

	Please tick
Identify different options	<input type="checkbox"/>
Develop a particular career path	<input type="checkbox"/>
Find ways to use my strengths	<input type="checkbox"/>
Produce a personal development plan	<input type="checkbox"/>
Develop my self-confidence	<input type="checkbox"/>
Set clear career goals	<input type="checkbox"/>
Investigate other work options	<input type="checkbox"/>
Improve performance and personal effectiveness	<input type="checkbox"/>
Develop and improve communication skills	<input type="checkbox"/>
Manage stress levels	<input type="checkbox"/>
Explore non-nursing career development	<input type="checkbox"/>
Transition into new role	<input type="checkbox"/>
Develop my working relationships	<input type="checkbox"/>
Develop my leadership potential	<input type="checkbox"/>
Manage my work and life balance	<input type="checkbox"/>

*With thanks to UCLH London for provision of some of this material*





## Appendix Two – Resource Pack for Facilitator

Career clinic facilitators should have an awareness of coaching skills, an interest in helping others to develop and an understanding of the opportunities within their organisation.

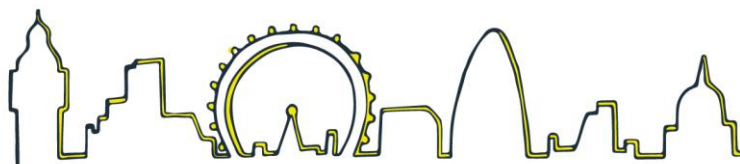
The following information may be useful for the facilitator in preparing for a career conversation.

How to use the CapitalNurse Career Framework in career conversations on the CapitalNurse Website <https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/career-framework> or

Facilitating a Career Conversation Workshop' is available as a self-directed learning option through the CapitalNurse website at <https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/preceptorship>

### Before the session

- Book time and space allowing between 45 and 60 minutes for the initial conversation;
- Encourage the nurse to prepare – using either the CapitalNurse Digital Career Framework tool <https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/career-framework> or the preparation pack available, if required – and share/return their information in advance
- Consider opportunities available in setting;
- Gather feedback from others;
- Think about the nurse, their achievements, what they enjoy doing and where they may like to progress;
- Consider sample questions you may want to ask;
- Use a coaching approach to facilitate the conversation;
- Encourage the nurse to take ownership of the discussion and any subsequent actions they decide to take.



## Sample questions

- How has your year been? How have you found preceptorship?
- What are you most proud of?
- What do you want to get out of this session?
- What do you think your key skills are?
- What do you most enjoy?
- Have you thought about what career you want to do?
- How has the organisation met your expectations so far?
- How do you think your colleagues perceive you?
- Are there areas you would like to consolidate further?
- How do you think your skills / talents are being used?
- What do you like / dislike about your job / role?

## During the career conversation

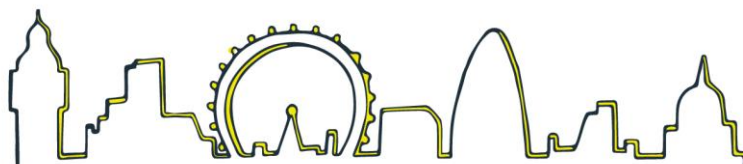
- Find out about the nurse with some general opening questions;

Refer to the material they have prepared and go through either their CapitalNurse Career Framework assessment digital tool using the six key questions and/or the SLOT analysis Current motivation/satisfaction, Career conversation focus paperwork;

- Identify areas they are particularly interested in;
- Go through options and opportunities for them;
- Use a coaching approach (GROW or SOAR) to provide a structure for the conversation.

## After the career conversation

- Summarise the conversation, any objectives set and responsibilities agreed;
- Complete any paperwork required by organisation;
- Agree on follow-up after a period of time (one month, six months);
- Gather any feedback, if required.

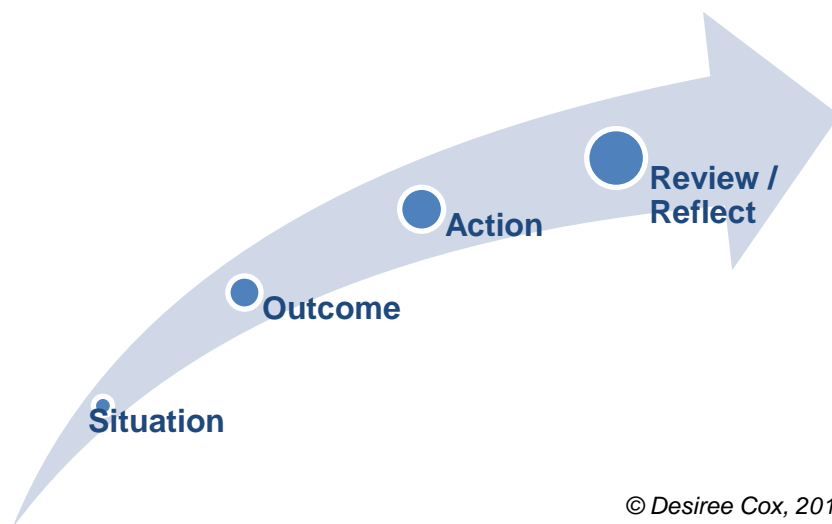


## Coaching

Information on the SOAR coaching model is attached with prompt questions for each stage.

### SOAR

A coaching model that has been developed specifically for use in healthcare, focuses on considering the Situation initially before identifying the Outcome, looking at potential Actions and completing the cycle with Review and Reflect.

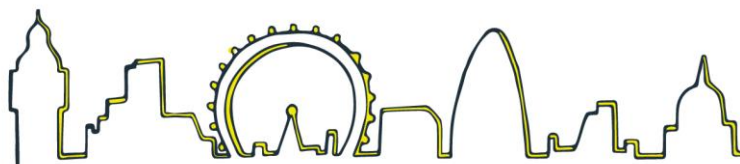


### Situation

- Tell me about your current situation.
- What skills / knowledge / competences do you have?
- What are your main responsibilities?
- What would you like to develop?
- Are there obstacles which are stopping you achieving what you would like to?

### Outcome

- So what is you would like to achieve?
- How realistic is that in terms of your current commitments?



- What are your longer term objectives?
- What about short-term objectives?
- What is your timeframe for this?
- How would it feel for you when you achieve this?
- How may this impact on other areas?

### Action

- What alternatives / options do you have?
- What would you do if you had a clean sheet?
- Which option appeals to you most? Why?
- What are the barriers you may encounter for this option?
- What is your commitment on a scale of 1 to 10?
- What stops you reaching 10?
- What is your timeframe?
- How are you going to measure your progress?
- How can I support you with this?

### Review and Reflect

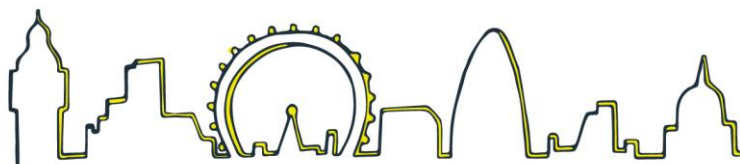
- How is it going?
- Are you where you planned to be in terms of achievement?
- Have you encountered any problems? And if so, how have you overcome these?
- What has gone / is going well?
- What you have learned from the process?
- How satisfied are you with the outcome?

### Information

- **How to use the Career Framework in career conversations**  
<https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/career-framework> or  
[https://www.youtube.com/watch?v=xthUMewBD\\_k](https://www.youtube.com/watch?v=xthUMewBD_k)

The CapitalNurse Career Framework is a tool to allow nurses to review and develop their career using self-assessment, reflection and feedback from service users and peers. Career conversations are built into the tool at different stages to guide the nurse in relation to their current role and career development opportunities.

The tool is free-to-use and has been designed to advance a London-wide approach to career progression. The tool helps nurses review progress, build confidence and further career options. It can be used in career clinic sessions and is easy to upload for NMC revalidation.



A user guide for the tool is available and videos how to use the career framework portal on the CapitalNurse Career Framework Page (see link above)

- **Facilitating a career conversation**

The preceptorship resources include different models in facilitating a career conversation [Preceptor development resources https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/preceptorship](https://www.hee.nhs.uk/our-work/capitalnurse/workstreams/preceptorship)

## Authors

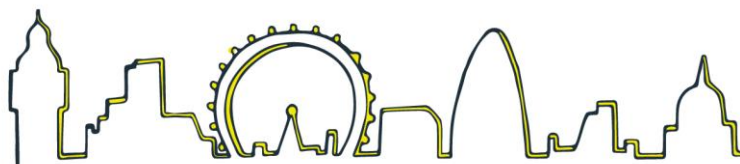
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