Foreword

The retention of staff is and will remain a key issue for the NHS. As organisations focus on workforce supply and increasing the numbers in the recruitment pipeline, it is important that both new and existing staff are supported and encouraged to remain in your teams.

In 2016–17 the NHS Confederation trustees granted funding for NHS Employers to work with over 90 organisations over 18 months to help equip them with tools and resources to develop and implement plans to improve retention.

In partnership with NHS Improvement and the Department of Health and Social Care, NHS Employers has been able to continue to support employers in this area. We have refreshed this guide, which is aimed at individuals who are charged with improving retention, to ensure it continues to draw on the latest learning and experience from the organisations we have worked with.

There is no single magical solution that will resolve staff retention issues. Improving retention is a result of the combined actions that are taken by the organisation, driven by the culture and actions of leaders. These are of course underpinned by robust policies and effective transactional processes but a focus on policy alone is insufficient. The key things which emerged from our work on retention are explored in more detail in this guide.

Ensuring we take positive action to retain our talented and skilled staff will remain a priority for individual employers and local systems. I am grateful to Ruth May and her team for working with us on this agenda and I also want to thank the programme participants for their commitment to improve their workplaces.

Danny Mortimer,
Chief Executive, NHS Employers

Using the retention guide

This guide aims to encourage you to consider the key areas which affect workforce retention.

This includes the enablers of retention, the organisational priorities which need to be in place to support staff and the practical interventions which directly impact on your employees’ experience at work.

It is aimed at anyone who has a responsibility for improving staff experience and reducing turnover in their organisation. This includes HR managers, line managers and nurse leaders.

Our self-assessment checklist on the next page lists some of the key topics which affect staff turnover. Completing the checklist will enable you to assess your progress against different areas and understand those which require focus.

Each section in the guide covers how different areas impact on retention, explores helpful tips and gives case studies from NHS organisations.

At the end of the guide we have included a template action plan for you to complete, helping you to prioritise and to develop or refine your retention strategy.
**Self-assessment checklist**

**Not sure where to start?** Identify which areas of this guide will be most useful for you by considering the statements below. Simply read the statement for each topic and tick each box either red, amber or green, depending on how much you agree with the statement. If you are unsure, read the different sections and come back and complete the self-assessment afterwards.

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<th>Statement</th>
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<td>We consider how we can use an organisational development approach to <strong>shaping organisation culture</strong>.</td>
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<td>We have a robust approach to <strong>understanding our data</strong>, which gives us useful insight into the experience of staff in our organisation.</td>
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<td>Our approach includes a focus on <strong>building line manager capability and capacity</strong>.</td>
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<td>We use <strong>staff engagement</strong> methods to gather feedback and ideas from our staff, and we act on their feedback.</td>
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<td>Our organisation has a comprehensive approach to <strong>supporting new starters</strong>, giving staff a positive experience from application to induction.</td>
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<td>We support our staff by providing them with opportunities for <strong>development and career planning</strong>.</td>
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<td>Our organisation takes action to support staff <strong>health and wellbeing</strong>.</td>
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<td>We offer staff a range of opportunities for <strong>flexible working</strong>, to suit their preferences and commitments outside of work.</td>
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<td>Our staff are supported to take up the range of <strong>flexible retirement</strong> options available.</td>
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<td>We consider potential barriers to <strong>making improvement and change</strong> from the planning stage onwards.</td>
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<td>We use a robust <strong>action planning</strong> approach to prioritise actions to improve staff experience.</td>
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<td>Our actions and initiatives are flexible, based on <strong>evaluating impact</strong>.</td>
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<td>We know what NHS Employers <strong>tools and resources</strong> are already available to support us to improve staff experience and reduce turnover.</td>
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**TOP TIP:** You could complete the self-assessment as an activity with a working group of colleagues from nursing, medical, HR and OD teams, to understand different perspectives.
Shaping organisation culture

One of the key learning points to emerge from our work with organisations is that improving staff retention should be approached as a transformational rather than a transactional process. Putting the majority of your effort into embedding a culture of transformational change will help you to focus on what’s important to patients and staff.

Once the organisations we worked with had identified the issues they were seeking to address and the changes they wanted to make, they followed an improvement methodology approach to generate and implement solutions.

Organisational development [OD] practitioners are an invaluable resource in generating and implementing solutions to the specific retention issues you have. Involving them in the planning stage will prove helpful, and there are many OD models which you can choose to support the development of your retention activities, which you can access in the tools section on the right-hand side.

Using organisational values and creating a positive workplace culture are ways of improving staff retention. Having values that staff relate to, and which they apply on a daily basis, will help build an organisational culture that staff enjoy being part of. This will help increase their attachment to the organisation and increase their likelihood of remaining. OD practitioners can provide support and leadership in developing your values and culture into practice.

ACTIVITY
What does good look like?

Try an activity with your board or leadership teams. Split the team into four groups and ask them to look at ‘what good retention looks like’ from one of the following perspectives: the board, an HR professional, line managers and staff within the organisation. Compare and contrast where there are similarities and differences between the four perspectives. Draw up three to five actions from the activity to take away and work on.

Tools and further reading

There are a number of additional OD diagnostic tools available on the NHS Employers website for specific areas of focus including identifying strategic priorities, problem solving, team building and development.

NHS Employers culture change
System wide OD
Understanding your data

Your organisation will already hold a large amount of workforce data which you can draw upon to develop your retention strategy. This data might be quantitative, for example staff survey results, and qualitative such as focus group feedback. It’s important to start with this data to identify where you might need to gather more information, and to help formulate your retention strategy to address the issues that really affect your staff.

To identify where turnover is an issue and to make improvements, there are a number of data sources available including:

- staff turnover and stability rates
- the NHS staff survey
- locally designed surveys
- workforce information from your electronic staff record (ESR)
- exit surveys
- conversations with staff
- data from national organisations.

Collecting and analysing this data and then tracking trends will help to identify the starting points for your activities.

To better understand your data you should consider who else in your organisation you will need to work with. ESR is likely to be the biggest data source available to you in your organisation. Your informatics or data analytics teams can help you to better access the full range of capabilities ESR offers. These teams can help you draw more accurate conclusions from your data and identify trends. For example, is there high or low turnover in a particular area? Are there organisation-wide issues or are they specific to certain staff groups, demographics, departments or teams?

Interventions made by West London Mental Health NHS Trust on the back of survey data, helped them to reduce the numbers of staff leaving the trust within their first two years by 17 per cent.

Read the full case study.
Things to consider

- What data already exists within the organisation and who has access to it? How can you work collaboratively with different departments to collect this? What information do you actually need to support the team / directorate and organisational decision-making processes?
- Do you need to introduce new data sources? If so, can you develop and design these with different people and departments within your organisation?
- How can you improve the decision-making process around deciding what data you need, the way you collect it and how you use and present it?
- Does analysis of your data show any key themes or trends? There could be specific issues that affect different staff groups or departments more than others, or there could be changes over time.

Understanding these themes and trends will help you adapt and evaluate your retention strategy.

- Can you engage with neighbouring employers and across your sustainability and transformation partnership (STP) or integrated care system (ICS) area to better understand where you can work collaboratively to address shared issues?
- Gather and analyse data from multiple sources. It will help you to stay up-to-date with the issues that are affecting your workforce and ensure your data is rich, enabling you to focus time and resources on the interventions which will have the biggest impact.
- How will you use your data to evaluate the changes you make? Consider looking at a range of indicators beyond staff turnover, for example, sickness absence or staff engagement.

CASE STUDY

Newcastle upon Tyne Hospitals NHS Foundation Trust created a dashboard which intuitively forecasted trends in workforce data. It allowed teams to manage potential retention hotspots before they occurred. Managers were able to view and analyse data in a way that aided their decision-making.

Listen to the case study featured on this using data to retain staff webinar.
Building line manager capability and capacity

One of the most important factors in an employee’s experience of the working environment is the support they receive from their line manager and in turn the culture of the team they are a part of.

Line managers are often stretched and juggling competing priorities. Making time to implement changes that will make a difference to staff experience can be difficult. A line manager’s role is especially critical in clinical settings, where they are responsible for managing large teams, planning rotas, and handling requests to work flexibly (see page 14 for more information). Managers also have a key role to play in supporting new starters (see page 9 for more information), enabling opportunities for career development (see page 11 for more detail) and supporting the health and wellbeing of their team (see page 13 for more detail).

With such an important role to play in staff’s experience at work, line managers need organisational support to ensure they have both the capability and capacity to contribute towards reducing staff turnover.

### Top tips to support line manager capability and capacity

- Empower your line managers to make decisions about their team, ward or department.
- Equip line managers to be effective managers – ensure they have access to training and support.
- Ensure line managers have time to manage staff built into their work schedule.
- Senior leadership role modelling is key to demonstrate to managers the values of your organisation.
- Communicate organisational priorities and messages clearly to managers.

Find out more by reading our briefing on supporting line managers to foster engagement.

### How line managers can improve staff retention

1. Manage flexible working requests to accommodate individual’s preferences as well as the needs of the service.
2. Support staff to develop their career and gain new skills by giving them opportunities to attend training, work with a mentor, or take up a rotational post.
3. Actively seek, listen to and respond to feedback from their team, to improve the team for all its members.
4. Build trusting relationships with team members, so they can better support them as individuals.

Direct your line managers to our practical people performance management toolkit for tips and guidance on managing performance.
Staff engagement

Engaging with employees, seeking their views and acting upon the results shows you value your staff and increases the likelihood of people remaining with the organisation. While high levels of staff engagement do not always equate to low levels of turnover, there is a significantly increased chance of retaining staff in your organisation or local health economy. Staff engagement can also have other benefits such as improved staff motivation and productivity.

**CASE STUDY**
Read this case study to find out how Northumbria Healthcare NHS Foundation Trust used staff engagement to improve staff experience, wellbeing and development.

**CASE STUDY**
Watch this video to see how Greater Manchester Mental Health NHS Foundation Trust engaged with front line staff to develop strategies to support career development, improve their preceptorship programme and implement new ways of gathering staff feedback.

**Top tips**

- Use your data to understand what motivates and drives your employees, and what makes them want to stay or leave your organisation.
- Have conversations with your workforce to find out what matters to staff and involve them in thinking about potential solutions. This could be in focus groups, team meetings or have a trust-wide staff engagement event or a place online where staff can submit questions and suggestions. These processes themselves also signal that you value staff views and opinions.
- Ensure staff engagement is a two-way process in your organisation, by providing opportunities for staff to feed in their views, ask questions and contribute to changes and decisions.
- Act upon the information you receive and feedback to staff where you have made a change to demonstrate that you are listening to staff on the issues that matter most to them.
- Consider how you recognise and celebrate staff contributions and achievements, across their whole employee journey. Some ideas include running an annual awards scheme, personalised thank you letters from board members and sharing staff successes in newsletters and online.
- Communicate with staff through various channels such as payslip inserts, trust intranet, twitter and face to face to make sure your messages reach them.
Supporting new starters

Placing the candidate experience at the centre of recruitment, selection and onboarding is essential to reducing the turnover of newly employed staff.

Developing an engaging and pro-active recruitment and on-boarding experience for new starters enables them to get a realistic picture of the role they are applying for and creates a good first impression of your organisation. Providing support and information to candidates from the initial offer stage and through induction sets new starters’ expectations of working in your organisation and, also strengthens their commitment to their employer, contributing to an employee’s intention to remain.

Recruitment

In a competitive labour market, a timely and effective recruitment process helps to ensure that staff with the right knowledge, skills and values join your organisation quickly. Discussions with potential applicants should focus on giving them a realistic insight into the role they are applying for and the organisation as a whole. Ensuring that candidates have realistic expectations of the role to reduce the likelihood of them leaving the organisation in the first few months. Ensuring your process is as streamlined as possible will allow you to recruit candidates at pace and reduces the likelihood of them accepting a job offer elsewhere.

Post offer

Keeping in touch with staff between offer and start date can help to reduce post-offer drop outs and is a great way of keeping candidates engaged in your organisation.

Many trusts already keep in touch with candidates waiting to start a new role, examples include:

- Sending candidates a series of three handwritten postcards from: the chief nurse, their ward leader and a colleague that they’ll be working with.
- Developing a new starter area on the intranet which helps to instil a sense of community prior to start date.
- Creating a closed Facebook group for new starters to engage with each other as well as HR colleagues.

Our Inspire, Attract Recruit toolkit can help you with the different stages of recruitment and aims to spark ideas for the process of attracting and recruiting new staff.
**Induction**

A robust induction provides new employees with the support and practical information they need to work effectively and helps them feel part of the team. Regular catch ups or one-to-one meetings will help to assess progress and offer support. In between these catch ups you can offer new employees additional support through a buddy or enable them to build a network with other new starters. Several trusts have implemented supportive approaches to inductions including inviting newly qualified nurses to tea with a member of the team or board director, to promote a culture where nurses feel valued and supported in their new roles.

**Things to consider**

- Has your organisation implemented values-based recruitment?
- Do you keep in touch with new starters between offering them a job and their first day?
- How can you streamline your recruitment processes and pre-employment checks, to maintain quality and assurance while moving at pace to improve the candidate experience?
- What do inductions look like in your organisation? Are there areas of good practice which could be rolled out across the organisation?
- How do you check-in with new starters across their induction period?
- Do you provide support to employees beyond induction, such as preceptorships and early years support for their first 2–3 years post-qualifying?
- Do all staff have meaningful objectives and development plans?

**CASE STUDY**

East Kent Hospitals University NHS Foundation Trust has worked to improve the experience of staff in their first year of employment. The approach of the trust has included values-based recruitment, a focus on attracting the right staff, introducing an online portal for new starters, the introduction of a high-quality corporate induction programme and a robust and consistent local induction programme.

[Read the full case study.]

**CASE STUDY**

Preceptorships provide a period of support and mentoring for student nurses under the supervision of a preceptor. In 2017 Warrington and Halton Hospitals NHS Foundation Trust introduced a new 12-month preceptorship programme for all newly qualified practitioners. Highlights from the programme included a two-week programme of clinical skills, monthly teaching sessions, clinical supervision, simulation sessions, access to supportive clinical educators and preceptors in each area, core competencies, resilience training and access to a mentorship programme after 12 months.
Development and career planning

Supporting staff through career development opportunities is important across an employee’s whole career and should be based on each individual’s preferences and career aspirations.

Building a strong induction programme, regular appraisals and one-to-one meetings between managers and staff should be a key part of your retention strategy. These meetings are an opportunity to discuss and agree development needs that can support the delivery of patient care and staff career development.

There are many learning and development opportunities which organisations could offer to staff and not all of these will necessarily cost the organisation money. Alternatives to traditional training courses include secondments, shadowing, mentoring and coaching.

Organisations may need to consider how their policies encourage development and career planning and what support line managers require to be able to implement this. Managers need to be aware of the support that the organisation offers and be knowledgeable about how they can support their staff to develop and career plan while continually learning.

**CASE STUDY**

Internal transfer schemes allow staff to move to a different role within a trust, usually on the same band. Transfer schemes are an effective way to retain valued staff and reduce the complexity and time taken to fill vacancies by simplifying the recruitment process. Internal transfers also allow for those individuals to develop new skills.

Read about University College London Hospitals NHS Foundation Trust’s experience of implementing internal transfer schemes.

**CASE STUDY**

Rotational posts move staff between two or more posts in a planned way over a fixed period of time. They can be offered across organisations, or a range of organisations such as in a sustainability and transformation partnership (STP). Rotational roles strengthen the employment offer to new and existing employees, share learning across departments and help staff to upskill and gain knowledge.

Read more about rotational posts in our briefing.

**CASE STUDY**

A career pathway for individuals can help incentivise them to remain within the organisation. Barking, Havering and Redbridge University Hospitals NHS Trust has developed one-page career pathways to show staff the extent of the opportunities available to them.

These can be viewed in the NHS Improvement practical improvement resource.
Things to consider: development and career planning

- What development and career opportunities are your staff looking for?
- What opportunities for training and development already exist in your organisation?
- How do you support staff across their career, from newly qualified to experienced staff?
- Do you provide staff with opportunities to move roles in the same band?
- Could you use the skills and knowledge of more experienced staff to support others, for example through coaching or mentoring?
- How can existing funding for training, such as the apprenticeship levy, support the development of your teams?

Top tips: career clinics

Several trusts have developed a careers service for their staff, to act as a point of contact outside of the immediate team and to provide information and guidance on career options. Think about these top tips:

- Are there already qualified coaches or career experts in your organisation you can draw on?
- Do you have experienced staff who could mentor colleagues or be trained to have career conversations with staff?
- What would work for your staff and organisation? A telephone helpline, online advice or face to face meetings?
- How could you co-ordinate the available opportunities internally to make them available to staff? Or could you collaborate with other local trusts to share vacancies and promotion opportunities across organisations?
Health and wellbeing

By supporting staff to lead healthy lives and make choices that support their physical and mental wellbeing, you can ensure they are well at work and can continue to deliver quality and effective care for patients.

Health and wellbeing is important for all staff. Looking after your staff will help you continue to retain them. The latest NHS annual survey found that almost 40 per cent of staff reported feeling unwell as a result of work-related stress over the past 12 months. There is no one-size-fits-all approach to health and wellbeing and individual’s needs and focus may change, so to retain staff in the longer term, taking a strategic and flexible approach will enable you to support more staff.

See our health and wellbeing web pages for more information.

**Top tips**

- Use your approach to health and wellbeing to complement retention.
- Get the basics right such as encouraging staff to take their breaks, have something to eat and to drink water throughout their shift.
- Ensure your approach to rostering manages the skill mix and shift patterns of staff to prevent people being overloaded.
- Link with your health and wellbeing lead to see what is available in your organisation to support staff and communicate this with staff.
- Provide line managers with the skills and training to effectively support their staff members’ health and wellbeing.
- Use the [NHS Health and Wellbeing Framework](#) and complete the diagnostic tool to understand the key enablers and find out more about the interventions you can make.
- Create a positive culture and encourage open conversations about health and wellbeing. See page 7 to read about how line managers can create positive and supportive teams.
- Link with trade union representatives within the trust to ensure staff and management views are included when implementing health and wellbeing initiatives.
Flexible and predictable working

Flexible working can mean different things to different people and staff are increasingly seeking flexible ways of working for a broad range of reasons. Understanding what type of flexible working your staff require is key to developing an approach to support them. Many staff seeking flexible working would prefer a predictable shift pattern.

We have explored this in more detail in our Improving staff retention: Flexible working guide

Recent work undertaken in Kent, Surrey and Sussex has found there are no generational differences in people’s expectations of work and being able to balance work and other commitment outside of work.

Why is it important?

• The UK workforce is more diverse than ever and staff are increasingly seeking roles that offer a good work/life balance. Flexible working is part of good employment practice and demonstrates that your organisation is a good place to work.

• Staff require flexible working for a wide variety of reasons, to balance raising children with caring for elderly parents, to look after grandchildren or to pursue other ambitions outside of work.

• When flexible working works well it can positively impact on staff attendance, morale and job satisfaction leading to motivated staff delivering the best patient care.

Things to consider

• How open is your organisation to facilitating different working arrangements? Do you have senior leaders’ commitment?

• How and when do you offer flexible working? Do you proactively advertise flexibility in roles, offer it post-recruitment or when a member of staff requests it?

• Have you implemented e-rostering or thought about team-based rostering?

• Can you be creative and offer different flexible working arrangements for staff at different stages of their lives or with different priorities to attract and retain talent?

• Does your organisation have examples of where flexible working works well such as in a ward or in senior roles? Can you use these examples to implement change wider across the organisation?

• How are your managers applying flexible working policies? Do they need further guidance or training?

• How responsive and agile are you when flexible working requests are received?

• How do you ensure fairness across your teams? Have you considered the role of bank and agency staff?
Flexible retirement

Flexible retirement gives employees some choice over when they retire and allows them to continue working in a different way.

By offering flexible retirement, your organisation can retain the valuable skills and knowledge staff have picked up over their careers for longer. Retired staff can also register for the staff bank, increasing the amount of bank staff available to cover high demand periods.

Understanding what motivates your employees and what their priorities are will enable you to help them approach retirement in the best way for them. Ensuring staff are informed of their retirement options and having open discussions with staff about their retirement plans can help you challenge misconceptions and develop a solution to help you retain staff.

Flexible retirement options provide an opportunity to support staff while retaining valuable experience within the workforce. They allow flexibility for organisations and staff around:

- the age at which staff retire
- the length of time a staff member takes to retire
- the nature and pattern of work in the lead up to final retirement.

CASE STUDY
Gateshead Health NHS Foundation Trust and Medway Community Healthcare have both introduced schemes where older nurses approaching retirement age or those returning from retirement are partnered with new starters to share vital knowledge.

CASE STUDY
Calderdale and Huddersfield NHS Foundation Trust was able to save more than 130 years of nursing experience between just four staff who took up flexible retirement options.

Our flexible retirement page has information to help you support flexible retirement in your organisation.
Available flexibilities

Some of these flexibilities are available dependent on the scheme your employer is enrolled in. [See the different types on our poster.]

**Step down** – staff can step down to a different role to reduce the level of responsibility while remaining in NHS employment.

**Wind down** – staff can wind down to retirement by remaining in their current post but reduce the number of hours or days they work.

**Retire and return** – members of the NHS Pension Scheme can request to retire, claim their pension benefits and then return to NHS employment. The Department of Health and Social Care [has released guidance](http://www.gov.uk) to help employers put policies in place to consider applications from staff.

**Draw down** – members of the NHS Pension Scheme can take part of their pension benefits and continue in NHS employment.

**Late retirement enhancement** – members can retire later than their normal pension age and have their pension benefits increased.

**Early retirement reduction buy out** – members or employers can pay additional contributions to buy out the reduction applied to the member’s pension if they retire before their normal pension age.

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**Things to consider**

- Do your existing policies include retirement flexibilities?
- How do you incorporate flexible retirement and retirement planning into appraisal discussions?
- How do you support staff who manage individuals or teams to have retirement planning discussions with their staff?
- How do you evaluate and manage requests for flexible retirement?
- Does your workforce planning incorporate retirement flexibilities?
- How do you work in partnership with local staff representative organisations to provide easily accessible information for staff about the different options available to retire and return?
Making improvement and change

During the planning stage of your retention activities you will want to consider some of the challenges you could encounter when trying to make improvement and effect change. Anticipating these challenges could improve the plan and ensure that it has a greater chance of achieving its objectives.

Things to consider

- What are the constraints in your organisation that prevent line managers and teams becoming involved? Look for ways you can remove these barriers.
- You may find that your future vision is so different from where your organisation is today that it becomes daunting. Acknowledge this, build trust and minimise concerns by helping line managers and teams to break the long-term vision into shorter-term actions for making change.
- If there’s still resistance, try using information and stories to connect in a different way and get line managers and teams engaged. Use examples of issues that are currently minor and explain how they can become major challenges for teams in the future if left unresolved.
- Encourage managers to create the vision for their team or department. The process is as important as the vision itself, as it gives everyone time to consider the change, what it means for them, and to voice any concerns.
- Where the change may be perceived as negative, talk openly about it to build trust. Also value your sceptics as they will help you identify things you may have missed.
- Continue the dialogue over time so that line managers and teams stay engaged and up to date with changes, and continue to see the benefits to them.
- Role model both the values and behaviours needed to create transformational change within your organisation.
- Taking time to slow down and observe what is going on in your departments will give you the opportunity to gain real insights into what is happening for staff and patients on the shop floor.
**Activity**

**Driver diagrams**

A driver diagram is a visual activity for tackling complex issues such as retention, and can be used to plan improvement project activities. The resource is usually one to two pages in length and is quick and easy to refer back to. It can be used with teams and boards when sharing details around your retention improvement project. Take a look at this information on [driver diagrams](#).

**Activity**

**Ritual dissent activity**

Ritual dissent is an activity for making improvement and creating a vision which everyone can buy in to. Teams create a visual storyboard to describe retention within their organisations, and then prepare a two-minute narrative to go alongside this. This narrative is then critiqued by listeners to make tweaks if needed. See the [knowledge sharing toolkit](#) for steps to follow to do this activity.

**Tools and further reading**

- Speak with your improvement lead about ways you can work together to improve workforce retention.
- Watch this video from the NHS Institute for Improvement and Innovation UK on [measurement for improvement](#), which shows you how to identify what steps to take when making change and improvement.
- East London NHS Foundation Trust’s quality improvement hub has everything you need to get started, from [step-by-step videos](#) for creating driver diagrams to [real improvement examples](#).
Action planning

This section of the guide will help you to prioritise the areas to focus on to improve staff retention in your organisation.

Now you’ve worked through this guide make sure you go back to page 3 and complete the self-assessment checklist. Look at the areas you rated red, you should begin by focusing on actions against each of these areas, as this is where you can achieve the greatest improvement.

Use the template on the next page, or your own existing action plan, and identify the three actions which you feel will make the biggest impact.

Things to consider:

- Are each of your targets SMART?
- Do you have robust evidence to suggest your action should be an action?
- Are the timescales you have set realistic?
- When setting your actions, have you considered the personal, team and organisational behaviours that may block your progress?
- When considering the engagement you will need from elsewhere in the organisation, have you considered how you might get their support?
- You may need to assign some of your actions to others. Have you identified the best person to take each action forward and worked with them to get them onboard? How regularly will you check-in to ensure the actions are completed on time?

Other resources that can help:

- NHS Improvement driver diagrams
- Stakeholder mapping exercise
- Creative collaboration and problem solving
- NHS England leading large scale change guide
## Action plan template

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<thead>
<tr>
<th>Topic and objective</th>
<th>Action</th>
<th>Owner</th>
<th>Timescales</th>
<th>Resources</th>
<th>Success criteria</th>
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<tbody>
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<td>Flexible working – to improve staff access to flexible working opportunities across the trust</td>
<td>Review data and information to understand staff views on flexible working – develop a board paper suggesting a new approach. Data to include: NHS Staff Survey Ward managers focus group notes</td>
<td>Lead – HR team Support from: Matron for Medicine HR Director Chief Nurse</td>
<td>2 months</td>
<td>Data and information Time to undertake analysis and develop board paper</td>
<td>Board agrees to new approach to flexible working</td>
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Print this page or use it as a starter to develop your own action plan.
Evaluating impact

During the planning stage of your retention strategy you will want to consider how you are going to evaluate the impact of the changes you intend to make. Being clear about what you want to achieve and making time to regularly review your activities will help you to assess how successful it is and whether changes need to be made. This will form a key part of a continuous improvement cycle.

Having a plan in place to evaluate your activities will help you to better communicate what you’re doing around retention and the value it has. It will also help you to identify risks and issues that might arise during implementation and helps you recognise where you have done good work.

The evaluation process can help you to think through how you will measure the impact of your retention activities from the start.
Tools and resources

For more tools, resources and case studies visit the NHS Employers retention web pages and the NHS Improvement retention hub.

Recruitment and induction

NHS Employers Inspire Attract and Recruit Toolkit
This toolkit includes guidance, top tips and best practice examples on understanding your workforce supply and your audience, the importance of being a leading employer, attracting the right people to your organisation and simplifying and improving your recruitment processes to create a positive candidate experience.

NHS Employers values based recruitment
The values-based recruitment hub on the NHS Employers website helps NHS organisations to recruit staff with the values that fit their organisation.

NHS Employers Streamlining programme
The streamlining hub on the NHS Employers website helps NHS organisations implement effective streamlined HR processes for all NHS to NHS staff transfers and to manage doctors in training rotations.

Employment checks
The employment checks section on the NHS Employers website provides guidance, resources and further information about each of the six NHS Employment Check Standards.

Line managers

NHS Employers supporting line managers to foster engagement
This briefing looks at the work that can be done to support and develop line managers to improve staff engagement across NHS organisations.

Guide to being an engaging line manager
This guidance document explores the behaviours that make effective people managers.

People performance management toolkit
This toolkit provides NHS managers with practical support to have effective performance management conversations with staff. The principles of the guide are transferable across health settings and aims to help you to develop the skills needed to deal with key management situations confidently and consistently.

Career development

Preceptorships for newly qualified staff
This web pages details all of the things you will need to consider when rolling out preceptorships in your organisation. Including the benefits and successes of other organisations.

Education and training
This section of the NHS Employers website will help you to navigate through the changes to policy and practice and provide you with news, advice and guidance to help you get the most for your workforce.

Apprenticeships
The apprenticeship and trainee web pages will keep you up to date with recent policy changes, best practice and provide key resources to help you grow and develop your workforce.

Routes into nursing
This infographic exploring the different routes into nursing for employers.

Maximising your apprenticeship levy
When procuring apprenticeships programmes, this resource will help you to consider the ways you can get more for your learners and explore different routes to add value to programmes and maximise the levy fund.
Staff experience

**Flexible working guide**
Our flexible working guide can help you to consider the different types of flexible working options and help you to build a business case.

**Evidence base for flexible working**
This document demonstrates how an effective approach to flexible working can improve job satisfaction, work-life balance and staff experience at work, and in turn positively impact upon staff retention.

**E-rostering information and case studies**
This page on the NHS Employers website highlights the benefits of e-rostering and shares case studies of the trusts who have had success implementing the system.

Another way employers can demonstrate their commitment to creating a positive organisational culture is by tackling bullying in the workplace. In addition to forming part of your retention activities, tackling bullying can also help reduce sickness absence.

Our tackling bullying webpages are dedicated to helping you promote a positive culture to tackling bullying.

The dedicated health & wellbeing webpages are designed to support employers through their wellbeing journey. Here you can find a number of resources and good practice examples from trusts. In particular you may wish to visit:

**Emotional wellbeing toolkit**
This toolkit designed is to help open conversations around how employees are feeling and help managers gain a better understanding of their own and staff’s mental health.

**Sickness absence toolkit**
This simple and easy to use guide provides NHS managers with everything they need to know in order to take a confident and consistent approach to sickness absence.

Organisational Development

Developing and implementing successful workforce retention activities is a transformational rather than a transactional process. Workforce retention leads need to consider working jointly with organisational development colleagues in order to tap into their skills and knowledge of implementing transformational programmes.

Our Do OD webpages can support you to lead transformational change in your organisations.
**Reward**

Organisational reward is a strong element of an overall retention strategy. If employees understand the benefits available to them, they will place a higher value on the overall reward package and this will help inform decisions they make about leaving or remaining with the organisation.

Reward offers can include elements such as salary sacrifice, cycle to work schemes, buying/selling annual leave, long service awards, recognition schemes and discounted season tickets.

Employee pay, as well as terms and conditions of employment, form an important part of the overall reward offer and include areas such as access to the NHS Pension Scheme, annual leave allowances, flexible working arrangements and family-friendly leave and benefits.

We have produced a [suite of tools](#) and resources to support organisations in their approach to reward.

**Diversity and Inclusion**

Having a focus on diversity and inclusion in the workplace forms a key part of organisational retention activities. It helps to build a talent pipeline and a workforce that is representative of the local communities that your organisation serves. Staff are more likely to recognise the organisation as a good place to work if there is a culture that recognises and values difference and seeks to ensure individuals have a good experience within the workplace.

[Our web pages](#) provide policy, guidance and a host of tools and resources to improve diversity and inclusion.
NHS Employers is the voice of employers in the NHS, supporting them to put patients first.

We actively seek the views of employers on key workforce issues and use our expertise to support them to develop a sustainable workforce, improve staff experience and provide high quality care to patients. We influence workforce policy at regional, national and European levels and turn policies into practical workable solutions.

NHS Employers is part of the NHS Confederation.

www.nhsemployers.org/retention
workforcesupply@nhsemployers.org
@nhsemployers

NHS Employers and NHS Improvement are working in partnership to support trusts to improve their retention. Using the combined workforce expertise in both organisations, there is a range of resources and materials available across both websites.

improvement.nhs.uk/resources/improving-staff-retention/
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