**Please amend as required to suit your organisational needs and adjust the band to match your job description and person specification.**

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Template business case – legacy mentors

25 August 2022, Version 0.1

# Covering note

* This document seeks support from (insert name) to fund XX Band 6 legacy mentors (please adjust this banding to suit your organisational needs and ensure the job description/person specification are in line with your preferred band). for XX hours per week for XX months on a fixed term contract/permanent basis supporting nurses/midwives/AHPs/primary care nurses/other staff groups e.g. social care. The total cost of c£XXk will be drawn from xxxxx budget.
* The legacy mentor/s will be recruited and employed by the (insert organisation) on behalf of the (insert ICS name). This proposal has been discussed with and agreed in principle by the XXXX, but will require their formal approval.
* The ICS/ORG has an overriding objective of reducing turnover in ICS/ORG by X% (to XXX%). The remit of the National Retention Programme covers all disciplines across health and social care although the focus is inevitably on nursing staff, given both the scale and particular challenges of that workforce.
* One of the key retention initiatives is to implement legacy mentoring, which seeks to retain the expertise of late career registered nurses, using their clinical and pastoral skills to reduce attrition amongst healthcare staff and students in placements, early in their careers.
* The Legacy Mentors will be appointed on a fixed term/permanent basis, working across the (insert professions) currently experiencing the greatest issues with retention of those in early career. Clinical oversight will be provided by XXXXXX.
* The legacy mentor role’s key outcomes will be to re-energise, empower and value people in late career as well as achieve an improvement in the experience for newly appointed nurses/midwives/AHPs/primary care nurses/other e.g. Social care in early career or practice placements, and ultimately increase retention in the critical first 2 years of their professional career.

# Executive summary

* There is an increasing need to provide additional support for colleagues in early career as well as students on placements, with a significant number of new starters leaving the NHS in the first 2 years of their employment.
* Approximately 30% of the NHS workforce are in late career, and we anticipate that many will be looking to retire.
* Research conducted in Canada in the paper ‘Legacy Mentors: Translating the wisdom of our senior nurses’, 2010, (Marion Clauson et al) cites that valuing of older nurses contributed to feeling respected by peers and new nurses, feeling energised, fulfilled and empowered, having a voice in the organisation, and improved job satisfaction (Norman et al., 2005, O’Brien-Pallas et al., 2007, Palumbo et al., 2009). While devaluation of experience and lack of respect are leading factors in older nurse attrition, they will stay if they are valued, able to contribute and treated well (Stokowski, 2008).
* As an alternative career option, the legacy mentor role can re-energise experienced individuals, support them to feel empowered and valued in the organisation and help them to stay in the NHS for longer.
* A legacy mentor could utilise their wide experience of working in a clinical setting to bridge the gap between academic and clinical settings for newly appointed colleagues and to provide additional support for students during their placements. This would help to ensure a positive experience in their early career and assist with enhanced learning outcomes and the sense of belonging within the team and organisation.
* The main targeted outcomes would be
  + an improved experience throughout early career
  + alternative rewarding career opportunities for those in later career, helping them to feel energised and valued
  + opportunity for experienced clinical professionals to impart their skills, knowledge and experience to others so that these are not lost
  + increased retention of newly appointed staff entering the workforce
  + Support for students in placements with coaching/mentoring to reduce the number of students opting to leave courses before graduation.
* The initial scope of the roles would be to focus their attention to support those staff groups with the greatest need.
* The governance to support and manage the legacy mentors would be XXXX. Recruitment would be handled by XXXX.

# Background

**(You may want to include staff survey results, leaver rate for early and late career, which professions you are experiencing greatest retention difficulties with, and any other relevant data).**

We are seeing the demographics of our workforce changing with younger generations far more likely to job hop and move around organisations to enhance their career development. There are different times in a nurses’ career when they are more likely to leave, for example, within the first two years of practice and in later career over the age of 50 years.

The staff survey results from 2021 have shown an increase in the percentage of people aged between 21-30 wanting to move to a job in healthcare outside the NHS or move to a job outside healthcare completely. In addition, we know that the COVID pandemic has had a significant impact on the workforce in a variety of ways, and many people are experiencing fatigue and burnout.

There has been an increasing need to support students with the challenges of moving from an academic to a clinical setting. This is something which has been greatly exacerbated during COVID but is also indicative of a generational shift in student requirements from higher education institutes and educators.

Students receive academic and wellbeing support on campus, but the demands of clinical environments are different and variable. Education teams have observed that it would be beneficial for clinicians to spend additional preparation time for students before/during their 3rd year placements, but this would involve allocating more precious clinical time and the expense of backfilling these roles.

Where legacy mentoring exists in other organisations, this has meant newly appointed staff and those on placements feel better supported and are more likely to remain in their organisations during early career, and beyond.

# Proposal

Recruitment of XX Band 6 legacy mentors XX hours/week on a fixed term/permanent contract, working across the (insert professions) currently experiencing the greatest issues with retention of those in early career. Clinical oversight will be provided by XXXXXX.

The Legacy Mentor will act as an additional link for the students on placement. Their career history and experience will provide them with an excellent understanding of the challenges faced by clinical teams, helping students adjust to this environment and supporting them to make the most of their placements and the related learning opportunities.

The Legacy Mentor will improve experience of newly appointed staff/students on placement by:

* Imparting skills, experience and knowledge to newly appointed nurses/midwives/AHPs/primary care nurses/other e.g. Social care and providing coaching on professional standards/conduct to ensure a positive experience in their early career.
* Advising students on how to get the most from a clinical placement: managing workload, meeting learning outcomes, proactive behaviour techniques. Assisting higher education institutes as necessary.
* Wellbeing support alongside other colleagues also focusing on pastoral support: work/life balance, time management, handling stress.
* Practical skills: note-taking, communication, prioritisation.
* Additional pastoral support for students on placement, freeing up educator time for clinical teaching.

Support will be delivered primarily through multi-disciplinary workshops, with additional multidisciplinary group coaching and some 1:1 personal support for priority cases.

**Project Scope and Exclusions**

* Include any scope details and exclusions specific to your ICS/Organisation.

# Expected benefits

* The Legacy Mentor role aims to improve experience at work and sense of belonging for newly appointed nurses/midwives/AHPs/primary care nurses/other staff groups e.g. social care colleagues.
* If those in early career are supported through legacy mentoring, there is anecdotal evidence that this will lead to a reduction in turnover/leavers and a potential to reduce the vacancy rate as this is seen as an attractive benefit for candidates.
* Utilising experienced clinicians to become legacy mentors will be a rewarding and appealing career portfolio opportunity for those in later stages of their career and will provide an alternative to retirement. It will also help to ensure people feel valued and re-energised at this critical point in their career.
* It provides a good opportunity to recognise the level of skills and demonstrates that we value our most experienced people.
* Legacy mentors offer additional pastoral support for students on placements, freeing up educator time for clinical teaching and leading to greater emotional wellbeing and improved academic outcomes for students.
* Additional coaching can be offered to enhance skills and subject knowledge.
* An accessible link for higher education institute course leaders to connect with clinical teams and to assist with bridging the gap between academic and clinical settings.
* This role provides an additional multi-disciplinary resource, concentrating on practical and psychological support.

# Costs

A total of XX legacy mentors will be employed on \*Band 6. The position would be funded on a basis of XX hours a week on a fixed term period of XX months/permanent. *(as an example, an average weekly ratio could be 1 full time equivalent mentor having 35 interactions across the organisation, so your requirements can be based on this calculation, dependent upon the workforce number in early career stages).*

# Timescale

The proposal is that the role(s) of a legacy mentor(s) will be resourced with effect from (insert date) and evidence gathered during their employment to support the value of the post.

# Areas for consideration

* How as an organisation we will measure success of the role as many other elements will impact on their experiences at work and retention of people.
* How the role will be publicised to ensure all higher education institutes, students and educators are aware of the resource.
* Who the role will prioritise to avoid demand outstripping role capacity.
* Whether the role will concentrate on the specific clinical details of any one profession or more than one, taking into account capacity
* Whether additional funding can be sought for a longer-term position if this is proven to be a valuable resource.