

Playbook for Staff Career Development

Case Studies and Guidance for Oncology Leaders

How to Use this Guide

To drive staff engagement and retention, oncology leaders need to provide their employees with career development opportunities. Structured pathways for career progression can be a key way to accomplish this. By providing structured growth opportunities, career ladders and other career progression pathways help staff feel a sense of accomplishment, demonstrate that leadership is invested in their careers, and encourage staff to feel a sense of ownership for their own growth.

While many development opportunities focus on managerial or administrative positions, this limits the options for staff who are not suited for or not interested in leadership. This document focuses on career development pathways that provide both non-managerial and managerial opportunities for advancement.

In this guide, we've provided step-by-step guidance to help you develop and implement a career ladder for your workforce.

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Determine the necessity

Career development programs are well-established retention tools, but do require investment of both time and resources. To ensure that you are using resources most effectively, think critically about whether or not a career ladder or other professional development model is necessary for your organization. You might want to consider a career ladder if one or more of these situations applies to your organization



High Voluntary Turnover



Competitive Recruitment Market



Perceived Lack of Development Opportunities

We've compiled some tools to help you determine if a structured pathway for career progression is necessary at your organization. Once you've decided to move forward, you can also use the data from your analysis to build support from others in your organization.

Benchmark your engagement

It's no secret that organizations with higher levels of employee engagement have better outcomes. Engagement data suggests that that career progression is a major driver of oncology staff engagement, especially when they are early in their tenure. Engaged employees are invested in their work and are often more loyal to the organization than those who are not engaged.

One way you can begin to evaluate the necessity of structured development programs is by looking at your employee engagement data. Using whichever engagement tool your organization conducts, explore the data to get a sense for how your employees feel about the development opportunities you offer.

To help you compare your employee engagement against a national cohort, we've partnered with our colleagues from Advisory Board's Survey Solutions. They've conducted an analysis of 2017 engagement data to determine what percent of employees reported that they agree or strongly agree with the following drivers related to overall engagement.

Driver	25 th	50 th	75 th
I receive effective on the job training	61.7%	71.4%	80.0%
My organization recognizes employees for excellent work	45.3%	58.3%	68.0%
My manager helps me learn new skills	50.0%	62.1%	75.0%
I receive regular feedback from my manager on my performance	53.0%	64.3%	75.9%
I have the right amount of independence in my work	80.0%	86.1%	93.5%
If I wanted to explore other jobs within the organization, my manager would help me do that	49.1%	60.5%	71.4%
I have helpful discussions with my manager about my career	49.2%	57.1%	67.0%
I am interested in promotion opportunities in my unit/department	57.4%	65.1%	73.9%
My most recent performance review helped me to improve	58.1%	67.5%	77.8%
Training and development opportunities offered by my organization helped me to improve	52.4%	63.0%	72.7%

We would recommend comparing our national benchmarks to your oncology workforce survey responses. If you fall below our benchmarks, particularly in areas related to development, this can be an indication that a career ladder could be an effective tool.

Source: Advisory Board Survey Solutions' National Employee Engagement Database; Imaging Performance Partnership, *The Imaging Leader's Workforce Toolkit*, Washington, DC: Advisory Board, 2018; Oncology Roundtable interviews and analysis.

Determine the necessity

Estimate the cost of turnover

Your organization may be spending much more on turnover than you thought. Data suggest that it costs up to two times an annual salary to hire new staff. Consider the time and resources it takes to recruit, screen, and onboard a new candidate. Work with your HR business partner to determine just how much turnover is costing you.

Factors contributing to an accurate, reliable estimate of turnover cost

- Replacement costs, including time to fill, overtime, PRN¹, traveling labor, capacity loss
- Recruitment costs, including time spent interviewing, advertising, relocation costs, salary difference
- Orientation costs, including staff, supplies, hourly wage, number of weeks in training, uniform
- Training costs, including supervisor hours, co-worker hours
- Processing costs, including exit interview, paperwork
- Payroll costs, including severance, continued benefits, unemployment, accrued vacation

Make the case

Once you've decided that investing in a structured career development program is the right move for your service line, you may need to make the case to others in your organization. To help, we've pulled together some of the data on the benefits of a highly engaged staff— and what that means for your cancer program.

Benefits of a highly engaged staff



Achieve better patient satisfaction scores

An organization's engagement index is correlated with both HCAHPS overall rating and the HCAHPS willingness to recommend score



Have a stronger culture of safety

"Engaged" employees are nearly four times more likely to grade patient safety as an "A" than "disengaged" employees



Retain the right staff

"Disengaged" staff are two times more likely than "engaged" staff to leave the organization



Improve staff performance

"Engaged" employees are 1.5 times more likely than "content" employees to receive the top review score

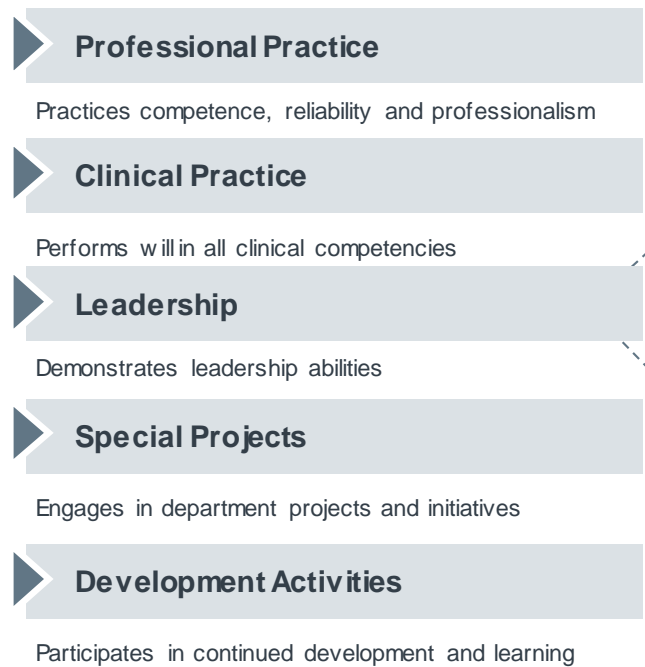
1) Pro re nata

Design an effective ladder structure

A career ladder should build throughout an employee’s tenure, with responsibilities elevating at each level. While tenure can serve as a pre-requisite for promotion, it should not be the driving factor. Progress along a career ladder should reflect performance against clear competencies. The case study below is from a radiology program, but contains useful information for oncology leaders on structuring the requirements for levels in a career ladder and forming a rigorous review process for progression.

Meir Health, a pseudonym, designed their career ladder around competencies applicable to all of their technologists. As a technologist moves up the ladder, the rigor of each competency is heightened. As you can see in the chart below, each level has a leadership competency. A level 1 technologist might be expected to seek ways to help colleagues. By the time they’ve moved to level 4, technologists are expected to support department leaders with tasks such as onboarding and mentorship. As technologists want to move up the ladder, they need to consider how to stretch into a higher-rigor version of each competency.

Meir Health’s technologist core competencies



Sample requirements defined by level

Level IV
Helps support the department leaders, supervisors and managers with interviewing, onboarding and mentorship

Level III
Encourages the personal and professional growth of others

Level II
Helps others meet their goals, supports coworkers and students in development of skills and resolve issues

Level I
Seeks ways to assist others

Technologists at Meir Health must also meet additional requirements in order to move up the ladder.

- Full-time employee with a minimum of 24 months tenure with the organization
- High performance review scores
- Board certified for a minimum of 24 months prior to application
- Demonstrated competency in current role
- No pending disciplinary action
- Meet self-development hour requirements

Consider compensation changes

Once the requirements and levels are in place, consider how compensation will be differentiated across levels. While the exact amount will differ at each organization, typically, each level comes with a 2% to 5% increase in pay. One potential opportunity to streamline the approval process for these new compensation levels is to use shift differentials.

1) Pseudonym.

Source: Imaging Performance Partnership, *The Imaging Leader’s Workforce Toolkit*, Washington, DC: Advisory Board, 2018; Oncology Roundtable interviews and analysis.

Select an advancement process

There are multiple ways to structure the career ladder progression process. We have detailed two common ways below. The first is to create a process independent of performance reviews, driven by those who have demonstrated interest in advancement. The second is to integrate career ladder progression into performance reviews.

1 Independent career ladder progression process

Meir Health created a Radiologic Technologist Career Ladder Board (RTCLB) that serves as the career ladder’s decision making body. The group, appointed by the service line’s Director of Medical Imaging, is made up of directors, managers, clinical coordinators, and technologists from all modalities who serve a two-year term.



Under this model, technologists drive their own path along the career ladder. Managers discuss career progression options and may suggest that a technologist apply to be considered for the next level. But ultimately, a technologist must self-nominate if they want to advance.

A technologist who wants to advance first presents a letter of intent to the board. If accepted, the board then guides the applicant through the next steps of the process, including submitting a resume and clinical narrative, and documenting competencies. The board then makes the final determination regarding the technologist’s promotion. But after a technologist is promoted, they need to continue to perform at the level of their promotion or they might be asked to drop down to their previous level.



2 Performance review-based career ladder

Because creating an entire committee responsible for running the promotion process can be resource intensive, career ladder promotion can easily be wrapped up into existing performance reviews. Staff can maintain responsibility for advancing and nominate themselves for the next level when they feel they have met the criteria. Then, their manager and HR can verify that the staff member is ready to advance based on their performance review.

Regardless of the specific process, you should provide staff with templates and guidance. See examples of the following application materials in the Appendix.



Application Checklist



Letter of Intent



Letter of Endorsement



Resume Template



Clinical Narrative

Consider an individualized career progression pathway

Structured pathways for career progression can take on a more individualized approach with development models that provide flexibility within structure. In contrast to traditional career ladders, individualized development portfolios are less focused on hierarchy and tiers, and more focused on individual staff interests within a standardized development track. Progress across an individualized development portfolio reflects achievement across multiple competencies, with no growth ceiling.

Gundersen Health System designed their professional development model around their desire to provide RNs increased levels of flexibility in training and development. In order to do this, they eliminated their clinical ladder in favor of “Individualized Development Portfolios” that encourage nurses to mix and match development opportunities. Unlike traditional career ladders that have a clear hierarchy, Gundersen’s professional portfolios encourages structured development and growth throughout nurse careers with no growth ceiling. Progression across development goals is assessed by nurse managers in annual reviews.

Components of professional development models

Characteristic	Traditional clinical ladder	Gundersen’s model
Level of flexibility	Staff confined to one track	Staff encouraged to mix and match opportunities based on their own interests
Structure	Hierarchical ladder; goal to advance upward by tier	No hierarchy; goal to grow by pursuing individual interests
Growth opportunity	Once at the top tier, no additional opportunities for growth at bedside	Encourages continued growth and development throughout career; no growth ceiling
Merit payment	Distributed annually based on ladder tier	Awarded based on specific unit or individual outcomes; distributed as outcomes are achieved

“Traditional **fixed or directed career tracks do not meet the needs of the future** generations of nurses or [the future] health care environment. Nurses want to [fill] a blend of management, educator, quality assessment, and [clinical roles].”

CNO, Gundersen Health System

Source: Gundersen Health System, La Crosse, WI; Nursing Executive Council, *The National Prescription for Nurse Engagement*, Washington, DC: Advisory Board, 2014; Oncology Roundtable interviews and analysis.

Building an individual practice portfolio

The steps below detail how Gundersen’s development portfolios allow flexibility within structure.

1 Provide a wide variety of development opportunities

The first component of this practice is to provide staff with a wide variety of development opportunities. The numerous professional development opportunities offered to Gundersen staff sort into three categories: education, leadership, and evidence-based practice research. Staff are encouraged to select opportunities across a mix of categories based on what they feel is most beneficial for their individual professional development. For a complete list of professional growth opportunities, see the Appendix.

Sample professional growth options

Education	Leadership	EBP/Research
<ul style="list-style-type: none"> • Become a preceptor for new RNs • Provide mentor training • Obtain specialty certification • Shadow a more advanced RN • Become a super user for patient safety/EPIC 	<ul style="list-style-type: none"> • Train to be a charge nurse • Participate in a council • Join professional nursing organization • Co-lead unit problem solving issues • Develop manager competencies 	<ul style="list-style-type: none"> • Use evidence to support improvement to patient care • Lead unit level quality project • Participate in system level research project • Write up project for publication

2 Enable self-directed participation with a required portfolio

The second component of this practice is to enable self-directed participation with a required portfolio. All nurses at Gundersen are expected to maintain a professional portfolio. Staff currently record their achievements on paper but will eventually be able to build their portfolio electronically. Staff can access sample portfolios and templates on the intranet and are required to update their portfolio every six months.

Key components of professional portfolios

Required for all nurses



- Staff required to track all achievements in portfolio
- Training provided on proper method for logging achievements

Updated frequently



- Staff expected to update portfolios at least every six months
- Updates must reflect all newly acquired education and skills

Easily accessible



- Model portfolios available for viewing online via intranet
- Template available for staff to fill in updates

Reviewed with manager



- Staff and manager review goals and achievements during annual evaluation
- Manager provides guidance for staff to create individualized career path

3 Track progress with annual manager portfolio review

The final component of this practice is to track progress with an annual manager portfolio review. During each nurse’s annual review, managers and staff review the portfolio together to track activity, discuss career development opportunities, and set long-term development goals.

Integrate across the department

In order to reap the benefits of career development opportunities as an engagement strategy, strategically announce and roll out your new development plan, support the plan's implementation, and embed it across the service line.

Roll out a new career development program

When rolling out a new career ladder or development portfolio, you'll want to ensure full transparency around the new program, making guidelines and regulations easily accessible. Managers can be an important, trusted source of information about the new program.

We recommend that you start by rolling out career development programs in manager meetings and ask managers to announce the opportunity at staff meetings. After the initial announcement, development discussions should be embedded in standard check-in meetings, performance reviews, and onboarding. You can even discuss the opportunity in recruiting conversations, as this can demonstrate to candidates your organization's commitment to staff development.

Ongoing support

Managers must also play a major role in ensuring a career ladder or development portfolio's ongoing success. One key responsibility is to work with direct reports to outline a plan for their continued growth and development against career ladder competencies. Managers should regularly meet with staff to discuss development—staff should be encouraged to come with thoughts about specific strengths.

Ideally, managers should meet with staff members regularly, but at a minimum, these conversations should occur with each staff member once per year. During these conversations managers should be sure to ask if they have the resources and support they need to achieve their stretch roles and if not, work with them to break down barriers.

To equip your managers to successfully lead development conversations with their staff, ensure that they can answer any questions about staff development goals and progress. They should know how to easily access application examples and competency requirements.

Excerpt of sample discussion guide

1. What is the career ladder program?

Meir Health recently design a career ladder development program for technologists. The program consists of four levels. The program was designed to motivate and encourage advancement in the field of imaging.

2. Who is eligible to apply to the development program?

Benefit eligible technologists, NM technologists, sonographers, mammographers, CT and MRI technologists. Eligible technologist must have successfully completed the minimum 24 months. Technologist cannot be active in the punitive process. Technologists with performance assessment at present level is rated competent or above in each performance standard.

3. What are the maintenance requirements of a promotion?

The maintenance is based on performance assessment. There is no need to reapply for the level you are in, but you must maintain your level of performance at competent in all standards of the performance appraisal. As part of the standards, there are requirements for self-development hours that are included in the performance appraisal process.

Integrate across the department

Integrate into recruitment and onboarding

Whether or not your organization is facing recruitment challenges, one way to bolster your career development program is by leveraging it during the recruitment and onboarding process to attract the best candidates.

A career ladder or structured development portfolio can be a great way to distinguish yourself from competitors. Consider adding a line about career development to a job description, as this is the first opportunity to showcase your organization's opportunities.

Sample job posting text

“ Newly graduated registered nurses with less than 12 months of practice experience are automatically enrolled into the first level of our nursing career ladder program (no separate application required). You'll get training to help you advance your clinical and professional practice. For tenured nurses, we offer a career ladder that will provide you with financial and professional recognition commensurate with your level of expertise ”

Onboarding

Many organizations see a great deal of turnover from early-tenure employees. In fact, new hire turnover is often higher than an organization's overall turnover rate. However, strong onboarding can help prevent some of this turnover. All too often, new hires depart because they didn't see their potential to grow at the organization, didn't feel that their manager is investing in their development, or didn't see the breadth of opportunities they were hoping for. Outlining career pathing as part of an extensive onboard process can help to alleviate some of these turnover drivers.

Here are some ways you can integrate structured career pathways into your onboarding process.

- ▶ Incorporate a career development information session into orientation week
- ▶ Include career pathing discussions in manager new-hire checklists
- ▶ Add career ladder competency diagram to new-hire welcome binders

Career ladder promotion application checklist

The written portion of the applications should be typed and presented in a professional, easily accessible form. This checklist contains the “must-include” documents necessarily for promotion.

- Letter of intent** from applicant
- Letter of endorsement** from director
- Resume** or **biosketch**
- Proof of self-development activities**
 - Dates
 - Hours
- Proof of continuing education records**
- Proof of staff meeting participation**
- Proof of committee participation**
- Self-evaluation** signed and dated within three month of application
- Director evaluation** signed and dated by the director and the applicant within three months of application
- Two peer evaluations** (*one evaluation will be chosen by Director*) signed and dated by the director and the applicant within three months of application
- Clinical narrative**
- Examples of practice projects** (*examples include plan of care for the procedure, standards, QI Tool, class or orientation module, etc., developed/revised by the applicant within the previous twelve months*)

Letter of endorsement

To: Career Ladder Committee

From: [Director]

Date: [Date]

Subject: [Endorsement of Career Ladder Promotion Applicant]

This letter is to endorse [Name of the applicant] application for progression in the career ladder program. Based on [Name of the applicant] performance and professional practice, I support his/ her decision for clinical progression to [II, III, or IV].

Name/ Signature _____

Date _____

Letter of intent example

[Date]

[Director]
[Department Name]
[Facility Name]

Dear [Director's Name]:

This is to inform you of my intent to apply for the [position title].

[Include a brief description of resume and clinical narrative]

Sincerely,

[Name] _____
[Position] _____

Resume example

[Date]
[Name]
[Number and Street Address]
[City, State and Zip Code]
[Home Phone]
[Unit Phone]

[Specific Professional Objective]

[Licensure/Certifications]

[Experience]

*List experience in reverse chronology (e.g., 2012-2011, 2009-2005)
Indicate dates (month/year) in the left-hand margin
Full time or part time*

[Education]

*List education reverse chronology (e.g., 2012-2011, 2009-2005)
Indicate years (e.g., 1968– 1972) in the left-hand margin*

[Honors/Awards/Publications]

*List names reverse chronology (e.g., 2012-2011, 2009-2005)
Indicate years (e.g., 1968– 1972) in the left-hand margin*

[Professional Associations]

List if related to professional goals

[References]

Available on request

Template for clinical narrative

Case Study:

Patient Name: _____

MR#: _____

Current Diagnosis: _____

Date Admitted: _____ Age: ____ Gender: _____ Height: _____ cm. Weight: _____ kg.

Allergies:

Pertinent History:

[Patient name] had ...

Procedure performed:

[Patient name] arrived at local emergency room at...or was admitted to the unit for....

Procedure Information:

This is a story of what was ordered, how exam was performed and who transported the patient. This is the narration of the patient journey from the ED or their room to the medical imaging department and back to room.

What I Learned From This Patient Care Encounter:

Summary: (Example)

Each patient encounter provides a series of opportunities to improve our skills and outcomes as an individual and corporately as a team. This experience, although an acceptable outcome, potentially could have resulted in a not so positive outcome. What I learned was that although there should be expedience in processing patients, no level of patient safety should be compromised to save time or cost. I have reviewed my actions, and have applied what I learned; hopefully I will utilize this wisdom to influence future decisions and others attitudes about patient safety.

Gundersen Health System’s professional growth options

Nurse leaders can use the following list of professional development opportunities to inform their organization’s efforts to revise its professional development model.

Education Opportunities	Leadership Opportunities	Evidence-Based Practice/Research Opportunities
<ul style="list-style-type: none"> • Specialists (SANE, Priority 1, TNCC, CPR WOCN) trainers • Certifications ANCC • School for BSN/MSN • Seminar, workshops, trainings • CEUs • Staff development • Skills Blitz Leaders • Super-user for Patient Safety, Epic, etc. • Preceptor • Mentor training • Educate nurse interns • Educate all students • Advanced job shadows • Based on goals • Other miscellaneous, defined by nurse and manager 	<ul style="list-style-type: none"> • Charge Nurse • Council member • Nurse Navigator • Member house-wide committee • Membership in professional nursing organization • Certification in leadership • Initiate intake forms at unit/department level that drive efficiency and financial outcomes • Communication is consistently professional and constructive • UPEQ Chair • Council Chair • Organization-wide committee • Officer on professional nursing organization (WONE) • Promote/initiate innovation that supports continuous improvement • Support manager in helping staff effectively manage change • Display high degree of emotional intelligence • Exploring Leadership Program • Talent Management • Stretch assignments • Utilize constructive conflict engagement to address problem • Co-lead unit problem solving issues using organizational tools • Manager Competencies/LET • Community Service– involvement as leader in health care clinic, Scout Leader, First Aid, community projects, etc. 	<ul style="list-style-type: none"> • Explore EBP • Explore EPIC for data gathering, data mining, and <u>developing</u> research/quality questions • Explore EPIC data for <u>answering</u> quality and/or research questions • Be change agent using evidence to support the team in improving patient care and creating healthy environments • Use their ability to critique and evaluate research evidence when contributing during rounding • Demonstrate expertise in specialty areas (SANE, Priority 1, Trauma, WOCN, etc.) • Collaborate with interdisciplinary team on discussion of evidence • Contribute to the National CPG review • Lead and/or participate in unit-level quality projects • Lead and/or participate in system-level research projects • Mentor students in nursing education programs conducting EBP and research projects • Lead or participate in a Journal Club • Write up projects for publication

Source: Gundersen Health System, La Crosse, WI; Nursing Executive Council, *The National Prescription for Nurse Engagement*, Washington, DC: Advisory Board, 2014; Oncology Roundtable interviews and analysis.