

# Facilitator guidelines:

# Talent review briefing

## For use with staff



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**Facilitator notes**

## Purpose

This slide pack has been designed to support the brief of individuals whose aspirations and readiness are subject to discussion at a talent review board/panel. Given the different perceptions and experiences people may have of talent review, the purpose is to ensure everyone has a shared understanding of the process.

When using these slides, it is best to position them as aids for a facilitated conversation or discussion rather than a presentation. This will help to ensure people can explore the elements that are most relevant to them whilst providing you with the insights into what will be needed to make this work for people locally.

Some other key considerations when using these slides:

* they have been designed to be used in their entirety, but you free to adapt as them for use within your organisation
* they are based on the assumption that you will implementing talent reviews at appropriate levels within your organisation
* these are intended to be used as a starting point / initial conversation. Other materials exist within the toolkit for briefing staff and training managers in the skills needed to apply talent management.

## Timings

The facilitator notes are based upon a 1-hour briefing session, but you can shorten or extend it as you need.

## Logistics

**Room layout –** whilst this can be facilitated with any size of group, it may become harder to maintain the conversational element once the group size gets beyond 20 people – it is recommended that you run a number of sessions to ensure all individuals who are being reviewed have the opportunity to attend. The optimum room layout is cabaret style.

**Materials required –** 1 x flip chart; projector and screen; wall space for sticking up flip charts; laptop and remote; spare pens for participants. It is recommended that you bring copies of your Review and Career conversation template so that participants have the opportunity to familiarise themselves with this and ask any questions they may have during the briefing.

## Facilitator guidelines

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| Slide and timing | Notes |
| **Slide 1 – Title Page**  **Slide 2 – Agenda**  **Slide 3 – Talent Review purpose and benefits**  **5 minutes** | Start by providing everyone with the opportunity to introduce themselves and share any expectations they have about the session.  Position the session as being an opportunity for everyone to seek clarity they need prior to the talent review taking place. Run through the key points of the agenda, these being to provide further background, context and positioning for the talent review, explaining what preparation is required from them with their own review and career conversations, the process of feedback and space for questions and answers at the end.  This enables positioning of the talent review and its purpose and benefits. Emphasis should be placed on the benefits to the individual and to the organisation. For the individual, it’s an opportunity to discuss their career to date and express their current aspirations so that future development and support for them can be taken into consideration. For the organisation, it is to ensure that they are creating succession plans based on robust information.  Here it may also be helpful to dismiss some of the myths that are often exist about talent review boards – they do not provide guarantees of who will be selected for roles should current post-holders leave, but are there to look at the aspirations and readiness of all staff so that decisions about succession planning can be made with transparency. Take the opportunity to ask individuals to contribute their thoughts/concerns at an early stage so these can be addressed throughout.  In some cases, this will also be about meeting regulatory requirements and supporting readiness to engage in system and regional talent management activity – this can be removed if not applicable to your organisation. |
| **Slide 4 – Principles**  **Slide 5 – Developing People: Improving Care**  **Slide 6 – Well Led Framework**  **Slide 7 – Regional Talent Boards**  **Slide 8 – Timescales**  **Slide 9 – Your role and responsibilities**  **Slide 10 - Conversation framework**  **20 minutes**  **Slide 10 – You and your manager**  **Slide 11 – You and your manager**  **Slide 12 – Considerations for you**  **20 minutes** | Next, provide a quick recap on the principles of talent management which are outlined on the slide. The key messages to emphasise here are:   * *A mind set as much as a process –* rather than a process or sequence of events talent management is also about mindset and the way in which we choose to understand each other. When implemented correctly talent management provides a clear lens that removes bias and prejudice and enables us to understand and appreciate the talents that are unique to each individual. * *An objective, fair and precise way of understanding people –* many of the decisions we make about each other are based upon limited information and influenced by subjective views and opinions. Putting in place a framework which can be used at all levels provides a more evidence based and objective way of understanding people. * *Interdependent with values, recruitment, appraisal and development –* talent management cannot operate in isolation and needs to form part of the way in which the organisation attracts, recruits, appraises, develops and retains people at all levels. * *Combines multiple measures - performance, potential, readiness and aspiration –* talent management concerns the relationship between four independent sets of variables i.e. performance, potential, readiness and aspiration.   Slides 5, 6 and 7 relate to external drivers/initiatives to which talent management is connected. Depending on the audience and/or organisational position, you may wish to remove or add to these slides as appropriate.  Touch briefly on the reference to talent management in the Developing People: Improving Care strategy which places greater emphasis on all organisations have a leadership and talent development strategy and approach in place.  If appropriate, you can also make reference to the Well-Led Framework which has started to set out some specific requirements for organisations in relation to talent management. These include having a strategic approach in place, having a succession plan for senior leadership roles and the organisation being able to demonstrate that is engaging in talent management activity with local system partners.  If briefing staff who are operating a sub-board level, it may also be pertinent to outline intentions for the Regional Talent Boards (RTBs) which are being implemented to enable greater visibility of talent pipelines for senior leadership roles across the NHS. Depending on the maturity of RTBs in your area, you may wish to add additional detail about the nomination and assessment processes or provide an indicative timeline for activity in your area.  Here it is useful to provide your organisation timeline as to when key stages will take place. For individuals being reviewed, it is helpful to outline when they can expect their review/career/talent conversations to take place so they can factor in time to prepare, when the review board/panel will meet to discuss individual aspirations, development and support and impact on succession plans, and when they can expect to receive feedback from the review. It is helpful to schedule feedback discussions within two weeks of the review.  Outline the expectations for individuals – primarily, these will include:  *Preparation* – making sure they factor in adequate time to reflect on their performance, potential, aspirations, readiness, development and/or support requirements    *Participation* – irrespective of the individuals’ aspirations, emphasise the importance of everyone participating to enable to organisation to form a whole picture to aid succession planning and to support individual and collective development needs  *Honest reflections/assessments of your aspirations and readiness* – encourage individuals to consider both their strengths and areas for development ahead of the conversations, and also to be honest about their career intentions so they can be supported appropriately. Explain that potential is unique to everyone – it is a not a static or stable characteristic and it will vary over time so it is important for individuals to reflect their current position which can be reviewed to reflect changes.  *Receptiveness to feedback* – outline the process for feedback and that individuals will receive this following the talent review. It will include observations on their strengths, areas for development and readiness which can be used to underpin their next steps.  *Ownership of actions/next steps* – ensure that individuals are clear that following the review, they will have a role to play in actioning any recommendations/feedback that emerge.  Run through the conversation framework that you are using and take any questions individuals may have on how their information will be used. Ensure you highlight any changes that have been made to your approach so as to familiarise individuals with them. Emphasise the need to focus on performance, potential, aspirations and readiness so that there is clear and consistent information about individuals’ intentions for use at the review.  These questions are designed to get people sharing their individual experiences in relation to certain elements of talent management, in particular the quality of conversations they have with their manager and way in which development is provided.  Stick up four sheets of flip chart paper around the room, each with a different statement written at the top of the sheet. Half way down the sheet draw the rating scale with Low, Medium and High. Ask everyone within the group to take a pen and then score how things are for them at the moment. The last statement relates more the organisation than them as an individual and is focussed on their perceptions of the transparency of succession planning.  Once everyone has rated themselves, encourage the group to stay on their feet and move around the sheets with you in turn. Ask people to share their reflections on how the scores are distributed and if they feel comfortable to talk about individual experiences. This can help to draw out the best and worst examples within the organisation and provoke a questions and ideas about how experiences can be improved.  Ask individuals to reflect on the quality of their relationship with their manager – the lowest point of the triangle (ritual cliché) being a relatively superficial place, and the highest representing peak rapport/authenticity. Explain that through building the relationship, this should improve the quality of the relationship and increase levels of openness, trust and transparency. This can result in improvement in the quality of the conversations they have with them. Ensure you explain options/support available for staff who feel it would be of more benefit to have a review and career conversation with another leader or if they wish to express any specific issues about the quality of conversations they are having in confidence.  Position the questions on the slide to gather any further insights from the group about factors that will lead to success/are important to them, and things that need to be avoided in order for them to have trust in the approach. |
| **Slide 13 – Feedback**  **5 minutes** | Sum up by asking individuals to reflect on receipt of feedback. These are reflective questions so there is no necessity to go through them during the briefing session but emphasise that these may be useful considerations for them given feedback is key part of the process/encourage them to explore this further in their review and career conversations. |
| **Slide 14 – Owning the actions**  **Slide 15 – Your questions**  **10 minutes** | The final briefing area to cover is ensuring that individuals are made aware that they have a role in taking ownership of actions following the review. Encourage individuals to develop a plan to support achievement of their current aspirations and signpost them to information about development options they could pursue/the organisation has to offer.  Finally, ensure that if people have any additional questions, they have an opportunity to ask these either within the group or with you afterwards. |