

# Talent Review Board

## Implementation Guidance



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# Talent Review

## Overview and implementation guidance

## What is it?

The talent review board is the term used within talent management to describe a group of managers who come together as a collective to evaluate performance, potential, aspirations and readiness of individuals. The individuals that they are discussing are sometimes known as the talent pool.

## Why is it important?

The purpose of the talent review board is to support managers in applying the appropriate level of rigor, fairness and objectivity in relation to the observations they have made about the individuals they manage. This should in turn assist in the process of making well informed decisions and fair evaluation of the levels of performance and potential that individuals are displaying at a given point in time.

## What are the outputs?

The talent review can be used to formalise succession planning discussions, and this can be completed as part of the process. Individuals who are being reviewed can expect to receive feedback following the review discussions. Templates for succession planning and the feedback can be found as part of the Toolkit.

Some organisations may use a 9 box-grid to indicate ratings of performance and potential of the individuals being reviewed, although there is now less emphasis on using these, instead ensuring that the focus of the review is succession planning and individual development/feedback/support.

## Who is involved?

Typically, talent boards/panels review staff operating at one level below them. The proximity of the relationships between reviewers and reviewees is important as the conversations to form opinions about succession and feedback need to be evidence based. Reviews operate most frequently at Executive, Sub-board and Divisional/Directorate level, with managers reviewing their own staff as part of the process.

The roles of those involved are outlined in more detail below:

# Facilitators

The role of facilitator is to chair the talent review board. They should set the scene by explaining the flow/agenda for the session. They should remind everyone about the process - the line manager sharing information, then contributors being able to ask questions and share evidence, then moving into a discussion about development/support, and succession implications.

You should aim to spend 15 - 20 minutes discussing each person. You may ask the line manager and contributors to qualify their evidence, challenging and/or supporting as necessary. You should also refer people to the definitions of performance and potential and readiness you use in your organisation to support decision making.

The facilitator also needs to ensure outputs are captured – you can do this yourself or delegate the responsibility to others in the room. Use the Talent Review Forms to capture key points of feedback for individuals and the succession plan can be drawn out onto a flip chart as a visual aid or printed off and completed as part of the process.

# Line Managers

Line managers present on the staff that they manage in turn. They should aim to relay:

* a little background about the individuals they are presenting
* comment on/evidence of their performance, potential, aspirations and readiness, and reference to any development/support that has been discussed
* sharing the ratings they have given themselves and your view on this
* any other information that you want to add which you believe to be relevant

Once the Line Manager has presented information about the individual, the facilitator should invite others to ask any clarifying questions and convey their (evidence-based) views. Once feedback has been gathered and succession outcomes agreed, the Line Manager moves on to the next individual to discuss until the conclusion of the review. It is the Line Manager’s responsibility to provide their staff with feedback following the talent review.

## Frequency

Talent review boards usually happen annually (in some cases bi-annually) and work best when aligned with the organisation’s appraisal cycle. This ensures as with the rest of the talent management cycle that review and career conversations can happen as part of or closely alongside the appraisal process.

## Talent Review Flow

This diagram illustrates the typical stages involved:

The steps in the ‘before’, ‘during’ and ‘after’ stages of the talent review are outlined in further detail below.

## Before the review

Good practice includes setting time aside to prepare thoroughly for each conversation, gathering evidence and completing any documentation prior to the review.

Information to inform the Talent Management process comes from two main sources, these being the appraisal (to assess the individual’s performance) and the Talent Conversation (to capture the individual and manager’s view on potential, aspirations and readiness).

This information should be gathered before the Talent Review Board and is used to inform discussions about the individual, their development and their readiness to fulfil any aspirations or succession requirements.

A date for the conversation with individuals who are being reviewed should be agreed – ideally this should align with internal review processes. Managers should commit to finding a suitable room, away from day to distractions and where they will not be interrupted. The length of your review is up to you, but we suggest that you set aside 2.5 – 3 hours – the meeting is almost certain to take longer the first time tie you do it.

There’s no right or wrong way to do this – some managers prefer to separate out the appraisal and talent components whereas others like to hold one conversation to accommodate everything. The needs of the individual should be taken into account to ensure this is as effective as possible.

Information should be submitted ahead of the Talent Review so that initial analysis can take place and an agenda can be prepared.

## During the review

In general, the talent review board will look to evaluate no more than 10 - 12 people in one session. This ensures the board has the opportunity to spend at least 15 minutes discussing each individual. The review board (which should be facilitated or chaired by an individual who is independent of the other managers) will then run through a process as follows:

* Managers will agree / be reminded of the ground rules and principles required for review board to run effectively.
* At the beginning of the day a succession plan will be drawn up on a flip chart and managers will write the names of individuals on post-it notes and stick them on the flip chart. This allows positions to be moved if necessary. It also relies on managers sending through the positions of each of their talent pool to the facilitator in advance of the session.
* The next stage (and what subsequently forms the bulk of the day’s activities) requires each manager to provide the rest of the board with evidence as to the decision making that has led them to their ratings of individuals. This should include sharing with the board where the individual sees themselves and examples and evidence from both the manager and the individual.
* Following this explanation, the rest of the talent review board are invited to challenge, comment, question or seek clarity. The outcome of this conversation is agreement between the talent review board about the readiness of each individual at that point in time.
* During and after this process each manager will need to record the conclusions reached by the group about the individual and how they can be better supported by the organisation. Managers will be provided with a feedback sheet that will help them summarise the key messages and form the basis of their follow-up / feedback conversation with the individual.

The above process can be challenging to facilitate particularly if there are large numbers of individuals to evaluate. With this in mind the selection and training of talent review board facilitators / chairs is critical and strongly recommended.

## After the review

As mentioned previously, feedback offers crucial insights and is a process fundamental to increasing the performance and potential of people in organisations. You need to plan your feedback carefully to ensure it is effective.

As with the appraisal and talent conversations, you should commit to finding a suitable room, away from day to day distractions and where you will not be interrupted. The length of your review is up to you, but we suggest that you set aside 1 hour. Managers usually bring along the outcomes from the Talent Review Board to share. You may also find it helpful to have copies of the review and career conversation forms at this meeting.

You should also reflect on the succession plan, ensuring this is complete and that any actions have been recorded so that these can be followed up at subsequent meetings.

## Suggested flow for the feedback conversation

The talent review feedback template can be used as a prompt for the conversation.

The manager introduces the conversation and debriefs how the Talent Review Board was managed as a process. Then the manager talks the individual through their feedback and outcomes and the rationale behind this. No-one else’s information is shared. Reiterate that there are no right or wrong places to be – the most important thing is to emphasise the quality of the conversation and to ensure that this leads to supporting the individual to maximise their potential.

The conversation should move onto exploring development options and the development plan created as part of the review should be revisited. Any development actions should be documented, enacted, monitored and evaluated on an on-going basis to review the impact it is having.

Remember there are a wide range of development opportunities that could be explored at a local, regional and national level. Amongst other things, these could include coaching, shadowing, networking, reading, taking on new projects, reflective practice, secondments and attendance at specific courses. More options are provided under the growth and development section.

Managers have a responsibility to work with their organisational learning and development functions to help them understand the development needs of their staff and finding appropriate ways of supporting these.

The key is to keep the feedback factual and then explore with the individual what they think they can do to improve or develop. When giving feedback:

* Be timely – make sure you set a time and date as soon after the review board as possible
* Be clear – explain the process and relay the facts
* Make it specific – give examples and explore how the individual can develop or improve
* Vary your approach according to the receiver – tailor your response accordingly
* Check your feedback has been understood – agree actions and next steps

## Ongoing support

Remember, the Review and Career Conversations are just the start and the conversation should be continuous. Individuals and managers need to revisit performance, potential, aspirations and readiness frequently to ensure the information upon which decisions are based is kept up to date.