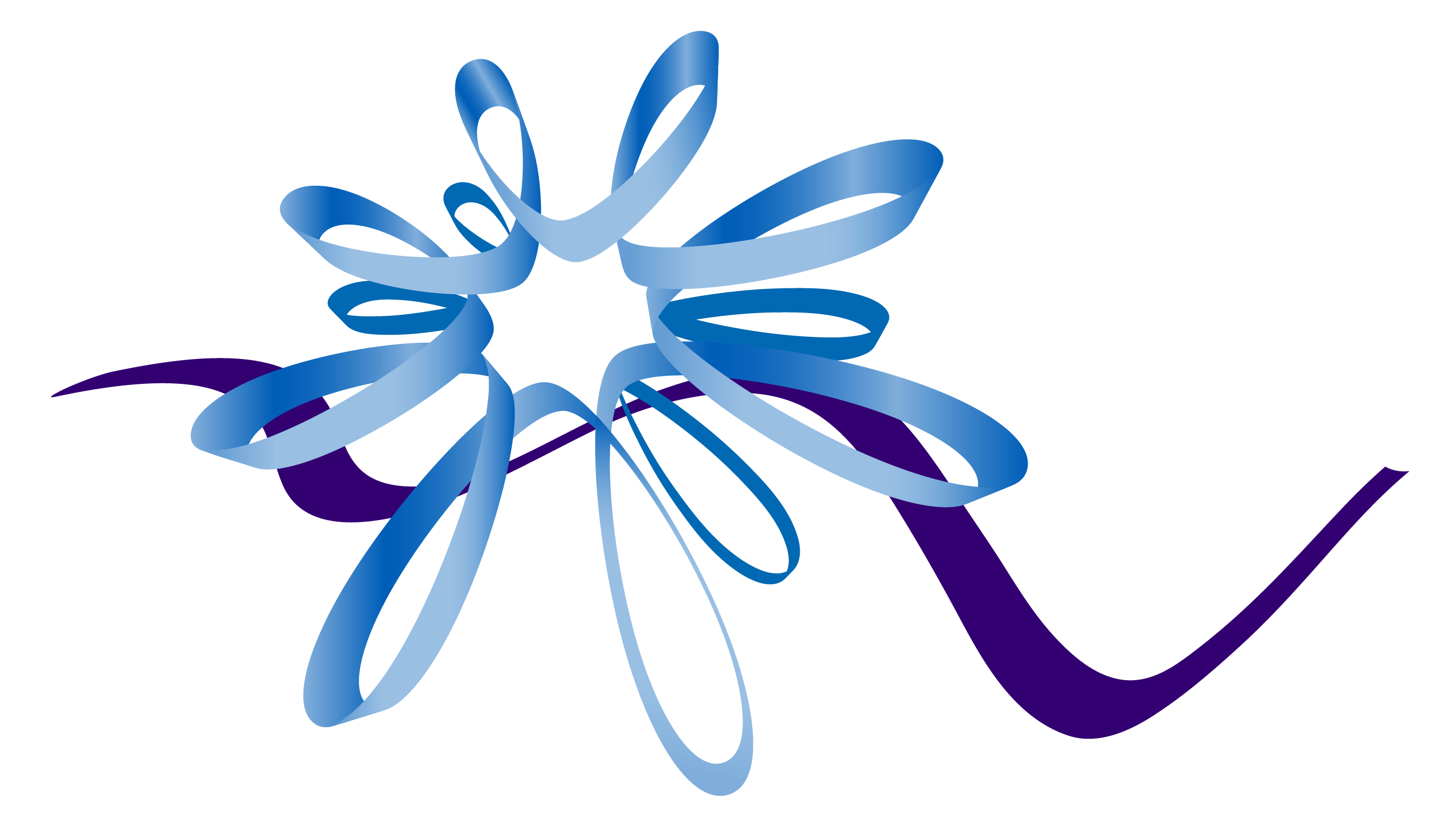


# Facilitator guidelines:

# Talent review briefing

## For use when briefing reviewers/panel members



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**Facilitator notes**

## Purpose

This slide pack has been designed to support the briefing of staff whose role it is to participate in talent review board/panel and collective succession planning discussions. 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 with panel/board members rather than a presentation.

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 2-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 12 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 managers 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**  **Slides 3 – 6 Positioning the wider context of talent management**  **15 minutes**  **Slide 7 – Talent Review purpose and benefits**  **10 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 panel/board members to seek clarity they need prior to the talent review taking place. Run through the key points of the agenda, these being to provide a brief overview of the purpose and outputs, what panel members need to do to prepare themselves and their reports, timescales, process for giving feedback and space for questions and answers at the end.  You may find it helpful to run through some of the external drivers for talent management if this has not been previously discussed. It is recommended that the discussion is high-level in order that the focus can remain on the talent review process itself, however, the key points to mention may include:  Developing People: Improving Care – within this strategy, talent management has been identified as a critical capability that all NHS funded organisations should be developing amongst staff.  Well Led: (where applicable) talent management, specifically succession planning for senior leadership roles, is now part of this framework and organisations are now being inspected on the effectiveness of their strategy, approach and contribution to system working in this area.  Regional Talent Boards – these are being established to enable clearer visibility of current and future talent at Sub-Board level. Ensuring organisational readiness to participate in regional activities is important – you may wish to explore what’s happening locally to provide more detailed updates if applicable.  Making connections – this diagram can be used to illustrate how national support is being provided to enable progress at organisation, system and regional levels.  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 panel members to contribute their thoughts/concerns at an early stage so these can be addressed throughout. |
| **Slide 8 – Talent Review Process**  **Slide 9 – Timescales**  **Slide 10 – Talent Review Mindset**  **Slide 11 - 14 – Sources of error, bias and other behaviours**  **Slide 15 – Preparation**  **30 minutes**  **Slide 16 & 17 – Talent Review Structure**  **Slide 18 – Talent Review Agenda**  **Slide 19 – Talent Review roles**  **Slide 20 – Capturing feedback/outputs**  **Slides 21 - 23 – Succession Planning**  **45 minutes** | Next, provide a quick overview of the flow chart so that panel/board members are familiar with the process itself. The key points are:   * Step 1 – this is the stage you are currently in. Explain that you will also be briefing reviewees to ensure all parties are clear on the process and their responsibilities * Step 2 – at the talent review itself, outline the role of the facilitator/who this will be so there is clarity about them ensuring the review runs in the right way * Step 3 – then explain that in turn, panel/board members will be invited to provide a brief overview about their staff to the rest of the group, comprising information about performance, potential, aspirations, readiness, development, strengths and any other pertinent points * Steps 4/5 – the rest of the panel/board will then have opportunity to provide input and feedback based on evidence they have gathered through their experiences of working with the individuals being discussed. Questions can be asked of the person presenting for clarification purposes. * Steps 6/7 – The facilitator will then ensure that appropriate feedback has been captured on each individual, along with decisions about succession and/or development. Panel/Board members will be tasked with providing feedback from the review to their staff. This process repeats until all staff have been reviewed.   Here it is useful to provide your organisation timeline as to when key stages will take place. For reviewers, it is helpful to outline when they should carry out their review/career/talent conversations so they can factor in time to prepare, when the review board/panel will meet, and when they are expected to provide feedback from the review by. You can also emphasise that it is helpful to schedule feedback discussions within two weeks of the review.  Cover the key ground rules that panel/board members should keep in mind – confidentiality, avoiding bias (following slides cover in more depth), being present – available for full session without interruption and using evidence to back up their views. Also encourage them to make the facilitator aware of any conflicts of interest that may exist so that this can be considered in the context of the talent review.  This is a useful space to explore some of the common problems that can be encountered in talent reviews. Explain briefly the sources of error that can arise, providing examples or inviting these from the group. Talk through the meaning of unconscious bias and why this exists and encourage panel/board members to consider when they may have demonstrated this without first consciously considering the foundations upon which their view points were founded. The triggers can be a useful reminder of when it is particularly important to notice this, and mentioning the other behaviours that individuals display that can give off messages or signals that may influence their decisions.  Touch upon the need for all panel/members to understand the process/approach, ensure they have developed a sufficient understanding of the individual’s current intentions and aspirations so that they can represent them appropriately at the review and encourage them to anticipate any areas of surprise or unexpected issues. Encourage discussion of any specific challenges around performance to be held outside the review on a manager to manager basis to ensure any sensitive matters are dealt with via the most appropriate forums.  Following the break (if required), recap on the different steps in the talent review process as described with Slide 8.  Ensure that panel/board members are clear on start and finish times and give them an indication of how long you intend to spend discussing each person. The agenda provided on the slide is for a full-day so you can amend this to reflect local arrangements.  Run through the roles as described on the slide and reiterate that the facilitator will encourage evidence-based discussions and provide constructive challenge on feedback that is not offered with examples to support it.  Here it is useful to encourage line managers to take notes/capture feedback using the form illustrated so that this acts as a prompt for relaying the key messages to individuals following the talent review. If the facilitator is going to take responsibility for capturing this feedback, this should be made clear as part of the briefing.  You may wish to explore the different types of succession planning options that exist (described in more detail within the succession planning guidance). Mention that you should be considering both short-term/temporary and long-term successors and explain how the template will be completed. At talent review itself, it is useful to have this drawn up on a flip chart, along with the names of individuals being reviewed on post it notes so that there is a visual picture can be created of the relative strengths and/or weaknesses of different pipelines.  Cover the risk log that reviewers will need to participate in the completion of by listing the different fields that should be noted/captured as part of the discussions. Explain that the facilitator will take responsibility for recording these and where risks exist, it will be their roles to support through putting any agreed actions in place. You can also touch on the different types of solutions that could/may be explored as part of this discussion. |
| **Slide 24 – Feedback**  **10 minutes** | Emphasise the need for panel/board members to provide the key points of feedback to their reports including positive comments and suggestions for further development, preferably within two weeks of the talent review. |
| **Slide 25 – Quick recap**  **Slide 26 – Your questions**  **10 minutes** | Reiterate the key points of the briefing including key actions/dates panel/board members need to be mindful of.  Finally, ensure that if panel/board members have any additional questions, they have an opportunity to ask these either within the group or with you afterwards. |