

# Facilitator guidelines:

# Review and Career Conversation Briefing

## For use with staff



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**Facilitator notes**

## Purpose

These materials have been designed to support managers to brief staff at all levels and enable them to get the best out of their review and career/appraisal/talent conversations.

These facilitator notes accompany the ‘Review and Career Conversation Briefing for Staff’ slides. When using these slides, it is best to position them as aids for a short presentation which can be supplemented with facilitated conversation or discussion.

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 engaging staff at all levels and encouraging conversations to promote inclusive talent management.
* these are intended to be used as a starting point for briefing staff. Other materials exist within the toolkit for training managers in the skills needed to apply talent management and host conversations effectively.

## Timings

The facilitator notes are based upon a briefing session lasting up to 1 hour and 30 minutes, 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 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 as you run through the briefing 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 – What we’ll cover**  **Slide 3 – Introductions**  **Slide 4 – Talent Management purpose** | Welcome everybody to the session,  Position the session as being an opportunity for everyone to understand the review and career/talent/appraisal conversation process, including what they need to do to prepare in order to get the most out of it. Depending on the type of framework you are using, you may also want to bring any changes you have made to existing processes to their attention.  Ask everyone to introduce themselves, providing their name, role and team/service/directorate and gather any specifics questions that they would like covered as part of the session. You can answer these as you go through or ensure they are discussed at the end.  This enables positioning of the talent management 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 management or refer to your own definitions/approaches more explicitly – take the opportunity to ask individuals to contribute their thoughts/concerns at an early stage so these can be addressed throughout along with any questions you have captured. |
| **Slide 5 – Context**  **20 mins**  **Slides 6 – 14 – Your conversation framework**  **30 mins**  **Slide 15 – Your role and responsibilities**  **Slide 16 – Making it work**  **Slide 17 – Feedback**  **Slide 18 - Accessing development and support**  **Slide 19 - Timescales**  **Slide 20 – Owning the actions**  **30 mins** | 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.   Here it is useful to run through your review and career/talent conversation framework – the slides included illustrate the review and career conversation template which is included as part of the National Talent Management Toolkit, however if you are using an alternative, you can insert the details of this.   * It is recommended that you cover the key aspects of the review and career/talent conversation: well-being, performance, potential, aspirations, readiness and development/support * It is recommended that you spend around 30 mins on this section, explaining each section including any components they are required to complete and how your organisation’s ratings should be applied. * Bring copies of your document so that the group can familiarise themselves with each section and encourage questions throughout   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 the organisation to engage in valuable discussions with its staff, form a whole picture of succession planning and to support individual and collective development needs. Here you can signpost individuals to the workbook which accompanies these materials which provides the individual provide some further reflections.  *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 as part of their conversation. 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.  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.  Ask the group to consider how things are for them at the moment, 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.  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.  Touch again on the importance of this – the skill of the manager delivering it but also the receptiveness of the individual to it. Explain that we all have strengths to celebrate, but as human beings, we also all have areas which we need to work on (or may never enjoy or be good at). The emphasis here needs to be on us all being able to recognise our good point and the less good and being open to working on both to maintain/improve our contributions.  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.  Signpost to information about your organisation’s development offers/opportunities here – demonstrate the range of opportunities where possible.  Provide an overview of the timescales in which your organisation expects conversations to take place.  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. |
| **Slide 21 – Your questions**  **10 minutes** | Finally, ensure that if people have any additional questions, they have an opportunity to ask these either within the group or with you afterwards and that you have covered those collected at the start of the session. |