What is talent management?

Talent is about those individuals who can make a difference to organisational performance, either through their immediate contribution or in the longer-term by demonstrating the highest levels of potential.

Talent management is the systematic attraction, identification, development, engagement, retention and deployment of those individuals who demonstrate talent to an organisation.

All individuals require development and should be valued within an organisation, however certain individuals displaying high potential can be supported to achieve their potential in a systematic and timely way.

Talent and career development is necessary for the retention of employees, no matter what their level in the organisation. Research has shown that structured career paths may be necessary for some staff, for job satisfaction and feeling valued within an organisation, hence job retention.

Talent management is ensuring that talented individuals are identified internally or recruited externally, developed and retained, to enable their contribution to be fully achieved.

This definition underlines the importance of recognising that it is not sufficient simply to attract individuals with high potential. Developing, managing and retaining those individuals as part of a planned strategy for talent is equally important, as well as adopting the means for the Board to understand the utilisation of this investment.

Talent management aims to consider the individual in relation to the organisation using two dimensions, one which takes into account their performance to date, the other their assessed potential. The two measures should also take into consideration an individual’s personal aspirations and motivations.

A report commissioned and undertaken by Ashridge Business School in 2006 stated:

“Leading organisations view talent management as a strategic priority and an important long term investment. The approach needs reviewing, refining and (in some cases) reinvention as an organisation’s needs and priorities change”.

It is therefore crucial as a high performing organisation, to ensure effective internal talent management systems.

The recent National Institute for Health Research report on talent management in the NHS Managerial Workforce details that “a systematic Talent Management policy may contribute to addressing three of the main leadership problems of the NHS: recruiting and retaining Chief Executives; a more diverse or inclusive leadership or an ‘NHS of all talents’ and benefits in terms of organisational performance, as organisations can achieve competitive advantage through people.”

In the 2011 Career Management Consultants Annual Survey conducted of senior HR professionals of both private and public sector, talent management emerged as a key theme. Over half of employers are focusing on developing talent in their organisation and almost two thirds are specifically focusing on developing managers. With an unsettled economy and skills shortages across most sectors, it seems that organisations are recognising the fact that business sustainability and success are dependent on having the right people, with the right skills, in the right roles.
In the NHS, we need to compete for talent and create resilient, agile and high performing leaders for now and the future by:

- Investing now to develop future talent
- Aligning talent to organisational goals
- Nurturing talented leaders
- Identifying talent gaps
- Retaining and developing talent.

It has been evidenced that effective talent management systems have the following impact on both employees and organisations:

- Talented individuals feel valued, they have plenty of opportunities to stretch their potential and progress in their career
- Where employees experience a stretch from working with talented colleagues, correct judgements about performance and potential are made; and people are enabled to make a real impact rather than just those individuals who know how to ‘play the game’ being able to progress
- Line managers are valued and rewarded for actively spotting and nurturing talent
- The CEO and the Executive Director Lead for talent is confident that the organisation has a reliable pipeline of talented people who are being prepared for key roles and promotions
- The whole Board are confident that the organisation has the right people in place to keep pace with a changing business environment and there is a plan for Board resilience
- External stakeholders, especially patients and commissioners, are confident that the business is led by the best individuals and has a robust succession plan in place.

What is talent development?

Talent development leads on from talent management. By which we mean that by identifying and managing your talent, you not only have an informed picture of the development needs of the individuals within an organisation, but also the future skills, styles and behaviours needed to take that organisation forward and effectively deliver against its priorities.

A talent development plan is the output from the yearly cycle conducted for appraisal and objectives setting with individuals and the departments within the wider organisation. By having an accurate annual position statement of who you have, where they are, what their strengths are, what their areas for development are, and what they aspire to be and do (mapped against their performance and potential), you can implement the plan to deliver the development needs of an evolving organisation.

By being part of an annual cycle there is the opportunity for learning from this process to constantly feed the development of the organisation and the staff that work within it.

Once an internal system has been agreed, being explicit with the staff and targeted audience from the outset about who the process is aimed at, ensures expectations are not inadvertently raised and individuals understand if the process is to include or exclude them. This in turn helps staff to understand what they can expect from the system, both if they have the performance, potential and aspirations to further develop, and also what they can expect if their performance and potential falls below organisational expectations.

This clear definition of talent management and development can enhance motivation of all staff, knowing that their contribution and input is valued and there is an avenue to be recognised and developed within the organisation.

Talent development supports the concept that ‘leadership’ should not just sit with those traditionally seen as ‘leaders’ but that there is a need for leadership characteristics, culture and attributes across staff at all levels within an organisation.

The ‘Organisational Readiness Checklist’ tool, Appendix 3, will help you measure strategically how ready your organisation is to implement a system and how it may be led effectively from Board level.
55% of businesses believe that having the right leadership team in place to take the business forward is a key priority.

(CMC - Best Practice Report)
What are we developing talent for?

The age-old ‘jobs for life’ in the NHS are no more. Therefore new and different ways are needed in terms of motivating, enabling and empowering individuals and leaders at work. This means the previously understood psychological contract has changed, and people working in the NHS need to regain their confidence and understand where they see themselves in the new structures and into the future, as traditional career pathways have changed.

The need is increasing to work more with other sectors. Leadership, management development providers and other education and development bodies, will need to respond, so that there is a combination of multi-sectoral learning and also specific sector learning, with adoption of some integrated approaches. Traditional performance appraisal and feedback will also need to be different when leading with peers.

Therefore, in order to achieve and deliver on the cross-sector priorities whilst also delivering against Quality, Innovation, Productivity and Prevention (QIPP), it is recognised we cannot work the same way we used to. We need to find new and innovative ways of working as leaders and encouraging staff at all levels of the NHS to do things differently, whilst enabling them to ‘be the best they can be’.

These new leadership practices need time to be developed, tested, and embedded. We need leaders that are capable of leading effectively within the most challenging environments. To implement the changes to the new and evolving NHS we need to recruit and grow our own local leaders to support the delivery of sustainable and effective organisations, and have a pipeline of our next generation leaders.

New leadership practices are already emerging, based on influencing without authority (part of peer leadership across the system), and within NHS organisations where there have been changes to the organisational structure, reducing the positional power available to some leaders.

To lead organisations forward in this new environment, we need leaders now, and in the future, who can lead in the following ways:

- Leaders need to be able to create a vision and take people with them
- Leaders need to be able to lead across boundaries, without authority, utilising high levels of emotional intelligence in order to influence through a shared mission or goal
- Leaders need to be in the present, but also horizon-scanning and adaptable, as models of the past will not necessarily help in today’s evolving landscape
- Distributed leadership is key, i.e. leadership at all levels as well as at the top
- Organisations may become less hierarchical and may be more technologically driven, but a management infrastructure will still be required
- The role of technology throughout healthcare is evolving and leaders need to understand how these advances can support them
- Leaders need to embrace diversity and be open to alternative views. They need to be able to find a common purpose within those differences (whether it is cultural, social or skill-based) and make the most of them – balancing direction and openness to alternative views.

In doing so they need to be able to recognise talent and solution all around.
The leader needs to be able to:

- **Engage** with people in a way that is reciprocal – give things away and trust that they will get more in return
- **Influence** without authority
- **Motivate** to inspire
- **Be strategic** – use resources and capitalise to get what is needed or wanted
- **Deal** with uncertainty and ambiguity

- **Understand** the need to cooperate, utilising diplomatic skills and working for a ‘win/win’ outcome
- **Recognise** talent and solutions all around
- **Have moral clarity** – the courage and capacity to understand others

A successful leader recognises their own strengths (talent) and has the self-awareness to recognise the limits in their knowledge and skills, working either to develop this within themselves and/or look for it in those who support them.

Therefore, we as a system in the North West are tasked with transforming health by transforming leaders for the new world with commercial, as well as quality-driven health outcomes.

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### Why do talent management and development?

**IN YOUR ORGANISATION**

Evidence suggests that performance will drop during times of organisational change, therefore Board and organisational resilience is crucial when transforming the NHS. By managing the talent already within an organisation, albeit unknown at the start of the implementation of a talent management system, develops this pipeline of internal talent. This ensures sustainability and succession planning into the future of the organisation.

As well as managing the talent already available, organisations must also ensure they are attracting the best in the first place and are then able to retain them.

Organisations should ensure that they review the following in light of their business objectives and workforce strategy, to ensure that they are able to attract the right people, with the right skills, at the right time:

- Internal and external recruitment strategies
- Internal and external recruitment and selection processes
- Retention incentives

- Organisational culture, ensuring it is developmental and supportive, working towards a diverse leadership workforce (in line with organisations’ internal equality and diversity policies and principles)

- Organisational morale – ensuring it is positive.

Talent management should happen at all levels of an organisation. All or part of this document and appendices can be adapted and locally branded to be used for all levels of staff within the organisation.
AGREEING THE LEVELS OF TALENT MANAGEMENT /TALENT DEVELOPMENT RESPONSIBILITY

A pyramid concept of subsidiarity suggests that locally generated approaches are supported and enhanced by regional and national support and that a ‘top down – one size’ formula is not appropriate. The key to success is close and consistent support at all levels of the system to avoid overlap and waste of resource – but equally to support individuals and organisations in achieving and putting best practice into place.

This approach indicates the personal responsibility that each of us hold in relation to our own development, embracing the concept of life-long learning and career planning. There are clearly mandatory requirements for some groups of staff to have well articulated and documented up-to-date and relevant records of personal professional development – robust appraisal systems support individuals in this, where it is not a ‘professional’ or statutory requirement. This should be standard practice.

The local role of your organisation is focused on:

- Executive responsibility to lead an organisational talent panel to review and identify talent
- Talent spotters and talent panel activity
- Alignment of annual development cycles
- Links to transparent objectives
- Agreement and implementation of a process based on best practice which takes account of openness, transparency and appraisal and performance procedures
- Talent identification, selection and development at a local level ensuring that the profile of leaders reflects the communities that they serve
- Demonstration of alignment of career paths with the organisation’s strategic direction and the development of care pathways
- ‘Hand off’ to the regional level where development needs fall outside of local ability to deliver e.g. in terms of scope or uniqueness, economy of scale
- Creating and fostering conditions for talent leadership and development
- Providing guidance, tools and techniques to line managers
- Consideration of inclusive talent and climates that enable talent to flourish.

IN OUR NORTH WEST REGION

With recent reconfiguration following the reforms, it is unclear what the impact on retention of senior leaders will be. Added to the fact that a significant proportion of the NHS senior leadership cadre is aged 50 plus, this will create major gaps in the next decade.

In understanding talent gaps across the region, bodies such as the NHS NW Leadership Academy, can work in partnership with organisations to address these gaps and have a regional approach to development, where it makes business sense to do so. Our role is to develop talented senior leaders once identified within their organisation, in addition to:

- Gathering research and evidence to support a process based on best practice
- Aggregation of organisational data based on openness and transparency
- Working with the local level where there are efficiencies / quality benefits in relation to scale, scope and economies of scale
- Promoting shared learning and acting as a catalyst for the spread and adoption of good practice in relation to talent management
- Commissioning senior leadership development programmes
- Advising, linking and connecting with sector and national colleagues where talent gaps due to skills or demographics are identified, particularly where associated risks could have an impact on care, oversight and governance
- Gathering the regional view of talent supply and demand
- Developing an effective map of the existing availability of talent that is ready now, ready soon and ready later
Illustrating where pockets of under- and oversupply of talent is evident
Commissioning leadership development to address any identified short, medium and long term, region-wide gaps
Tailoring regional standards with a particular view to equality and diversity.

ACROSS OUR NHS NORTHERN SECTOR

Working with NHS colleagues across the Northern Sector to identify potential northern gaps and talent pools, where this makes business sense and widens the pool for our North West organisations. In recent surveys the answer to the question ‘How confident in your professional grouping are you that we have good leadership talent coming up through the grades?’, highlighted the following:

- **Directors of HR** – High confidence due to development programmes delivered over the last four years
- **Directors of Finance** – Medium confidence
- **Medical Directors** – High confidence, but not across all sites
- **Directors of Public Health** – Medium confidence dependent on employment considerations
- **CCG leaders** – Low confidence due to these being new and evolving roles
- **Executive roles** for enduringly challenged organisations – low confidence

This is supported by:
- Aggregating northern data
- Commissioning leadership development to address any identified short, medium and long term sector wide gaps.

DEMOGRAPHIC CONSIDERATIONS

We know the average age of our national population is projected to increase, with the average age rising from 39.7 years in 2010 to 39.9 years in 2020 and 42.2 years by 2035.

Between 40% and 70% of all Senior Executives will become eligible for retirement in the next five years at most major corporations (Gandossy & Kao, 2004) and this trend looks set to continue as in the NHS in the North West, approximately 47% of our senior leaders are aged 50 years plus.

An ‘Organisation for Economic Co-operation and Development’ (OECD) study, reveals that Britain has lost to other countries, one in ten of its most skilled people and is experiencing the worst ‘brain drain’, compared to 220 other countries.

Of those emigrating:
- 27.3% had health or educational qualifications;
- 37.7% held humanities or social science degrees;
- 28.5% were scientists or engineers.

As the ‘baby boom’ generation approaches retirement age, larger cohorts of workers will be retiring while the numbers of new labour market entrants will be insufficient to replace them. As a result, a major labour shortage is expected, which will pose a serious threat to macro-economic performance and competitiveness, despite productivity and technological advances (Villoso et al, 2008).
These trends are creating an unprecedented demand for talented people and an unprecedented shortage of traditional sources of talent, namely young people and more experienced professionals. To have an identified talent pool ready to undertake senior leadership level roles in our most complex and challenging organisations, attracting top talent is key. This enables organisations to deliver the best possible services to patients and to ensure that the NHS continues to reform and improve to meet the demands upon it.

Supporting these potential national issues, the NHS NW Leadership Academy will ‘hand off’ development more appropriately delivered at a national level to the National Leadership Academy, whose role is:

- Development where customer group development needs are unable to be offered regionally due to customer size, scale or uniqueness, and/or where it would not be impactful or cost effective at a regional level (ie Top Leaders – small specific professional groupings)

- Talent development at a national level where regions/sectors have identified a specific pool requiring development (and this has been triangulated)

- Aggregation of regional/sector data

- To set standards to improve consistency of approach

- To lead on creating improvements in talent management, articulating and supporting efforts at all levels, as a partner organisation

- To support research and development and in particular the impact of talent management and its correlation to quality of care

- To maintain a focus on equality, diversity and inclusion.

By understanding talent management and talent development at each level within the NHS, and each undertaking, its responsibilities, with appropriate hand-offs built in, we will have a better chance at a supply of talent and support at every level.
the average age of the national population is set to rise from 39.7 years in 2010 to 39.9 years in 2020 and 42.2 years by 2035.
WHAT ARE WE LOOKING FOR?

TALENT SPOTTING

Traditionally, organisations rely on people self-nominating or promoting themselves to know who may be their rising stars. There is however a bigger organisational responsibility to drive and own this, and make it a systematic process.

In order to support those with the most talent to progress, it is essential that leaders are able to identify and signpost these individuals to the most appropriate developments within their organisation’s talent management and development process.

How do we know talent when we see it?

AMBITION

What I want to do

POTENTIAL

What I can become through learning

BALANCE

Not equal in all of us (as some suggest)

Speed of Conversion

As well as the two dimensions previously mentioned, performance and potential, aspiration/ambition to progress is a key element. Although an individual may be high performing in their current role and have the ambition to progress, it is their potential for more complex working that needs to be assessed, and also the speed with which they can convert potential into actual performance supported by development, indicating ready soon or ready later.
In spotting talent we must consider the following:

- Current performance in role
- An individual’s aspirations for their future
- Personal motivation to progress
- Potential to progress
- ‘Bouncebackability’
- Speed of conversion
- Future role suitability

When an individual makes a career move, they may transition to:

- A more senior post
- A portfolio requiring new expertise/knowledge
- A completely different discipline/sector.

Research suggests that talented individuals can usually make one ‘job transition’ without too much trouble. In a few cases, a talented individual may be able to manage two transitions at the same time, however, evidence suggests, three combined transitions is nigh on impossible!

The National Leadership Framework provides a single framework for a consistent approach to understanding ‘leadership development’ and associated competencies for staff in health and care, irrespective of discipline, role or function. It represents the foundation of leadership behaviour throughout the NHS, and provides a common leadership language.

The Leadership Framework is designed to enable staff to understand their progression as a leader and to support the NHS to foster and develop talent. There are many ways it can be applied, for example:

- To raise awareness that effective leadership is needed across the whole organisation
- To underpin a talent management strategy
- To underpin an existing leadership development programme
- To inform the design and commissioning of training and development programmes
- To develop individual leadership skills
- Through team development
- To enhance existing appraisal systems
- To inform an organisation’s recruitment and retention processes.

To access the framework visit http://nhsleadershipframework.rightmanagement.co.uk/

As well as the attributes detailed in the Leadership Framework, we also need to spot leaders who demonstrate:

- Ability to exploit inner drive. To build and grow things, as well as connect with others in the making. The ‘maker instinct’ is basic to leadership in the future, as leaders make and remake organisations
- Ability to see through messes and contradictions to a future that others cannot yet see. Leaders need to be very clear about what they are making, but very flexible about how it gets made
- Ability to turn dilemmas into advantages and opportunities
- Ability to immerse in unfamiliar environments, and to learn directly in the first-person
- Ability to turn dilemmas into advantages and opportunities
- Ability to be open and authentic about what matters to you without promoting yourself. If you promote yourself, you become a target
- Ability to create quick early versions of innovations with the expectation that later success will require early failures. Leaders will need a learn-as-you-go style of leadership that knows how to learn from early setbacks and fail in interesting ways
- Ability to create, engage with and nurture purposeful business - social networking through intelligent use of electronic and other media
- Ability to seed, nurture, and grow shared assets - which can benefit other players and sometimes allow competition at a higher level.

Evidence of past examples of NHS leaders showed many of them to have adopted a pace-setting style, strong minded and focused on getting the job done, with leaders declaring a preference to leading from the front, with strong strategic thinking. These styles were necessary in recent times when the focus was on achieving targets. However, there is an acceptance that as the NHS develops and cross-sector ways of working are necessary, leading without authority, partnership working and other leadership styles are paramount.

Current and emerging leaders need to develop a full range of leadership styles, and whilst pace-setting, delivery and execution, does have its place, it should be used to compliment other styles.

We therefore need to look for the following styles:

- Collaborative style
- Influencing along with affiliative
- Activity leading and participatory
- Long term strategic and visionary
- Dynamic and coaching as well as pace setting
- Whole system approaches and horizon scanning
- Have courage, commitment and accountability.
How do we assess and identify talent?

It is important that an organisation maintains a balance between equity of access to training and development to all staff in role, fast-tracking those individuals that show the potential to work in more complex roles, whilst mapping these initiatives against business need.

However, within every organisation, there are people who show the potential to be future leaders and strategic thinkers. It is usually clear to those they work and interact with, that they could, with the right support and development, advance further than their current role or environment allows, as we explored in the previous section.

WHAT ARE THE KEY TALENT REQUIREMENTS?

ROLES

As well as identifying talented individuals, the organisation must also be clear about their business critical posts - those posts that if suddenly unfilled would cause most risk to the organisation. When considering those in the talent pool, what roles are they talented for?

As a start to this process, a high-level exercise should be conducted to ascertain what the key requirements of the organisation are now, soon and in the future, to ensure your talent development plans meet the needs of your evolving organisation.

The following are broad questions to determine if a role is “key” or not, and to prompt consideration of the skills needed to lead the organisation in the future:

■ Is this a significant leadership role?
■ Is there a known scarcity of people in the pipeline to fill this role?
■ Is the role integral to current operational activity?
■ Is there a significant people/team management aspect?
■ Is this role accountable for the delivery of key strategic priorities?
■ Is the role a bridge between the organisation and other key partners?
■ Is there a known increase in demand for this role based on planned retirements?

In addition to these questions, following transformation of services, consideration also needs to be given to:

What are your key roles and skills needed in the next 3-5 years?

Appendix 4 can be used to help in ascertaining if a role is key or not.

WHAT HAVE YOU CURRENTLY GOT?

IDENTIFICATION

It is important to identify which group of employees constitute your talent pool. It is critical that you monitor your talent in some way, to ensure that the talent is not “leaking” away at certain career stages and that the pools have enough entry points to ensure they are replenished as necessary (not by the same historical groups or professionals). It is also essential that this is an inclusive process that considers a richness of diversity for optimal organisation performance.

Career development status based on performance and potential needs to be done in agreement with the individual and their line manager. This ensures a true reflection of their aspiration and potential to achieve and that the process is transparent.

By using a potential and performance tool, Appendix 5, which is a simple way to assess any population of leaders on two important dimensions,
it is also a great way to facilitate a dialogue amongst a senior leadership team. The Executive Team can use it to calibrate their expectations and ratings, open debate and obtain multiple perspectives to provide a much more accurate assessment, rather than just one person’s opinion. The process can facilitate a shared sense of ownership for the organisational talent pool and identified development needs.

The tool is best if used by a team and facilitated by someone who has experience with the process. This could be an HR professional, OD Practitioner and/or someone responsible for leadership development or succession planning.

The tool and process should be presented to the team to make sure they all understand and buy in to the purpose and process. It should not be underestimated the amount of anxiety a team has never done anything like this before (a ranking exercise). It is best to decide ahead of time how performance and potential will be assessed (use a leadership competency model if you have one).

Other relevant information should be asked for, such as years in current position, diversity status, retention risk, or relocatability, one level at a time (comparing ‘apples to apples’).

Sponsoring managers should explain the rationale for their assessment by asking lots of whys and triangulating agreement should be reached. This first assessment can be then used as a benchmark for all future assessments to compare against. If there is disagreement in perception, agree any change of decisions based on new feedback.

This process will enable the organisation to assess the performance and potential of individuals and test the consistency of the information gathered. It provides an indication as to the readiness of an individual to progress to the next level; as well as a consolidated picture of the pool of people likely to progress within a given time frame.

**Appendix 7A** shows an example of identification of a Future Talent Resilience Map and is supported by **Appendix 6** that guides the user through a bank of questions, once the performance and potential has been plotted on the grid in **Appendix 5** supporting the open and honest conversation with the employee, identifying development interventions that can be delivered via the organisation’s local activity.

Equality of opportunity for all needs to be considered within the process.

Use the flowcharts and appendices to start the talent management processes. However, **remember**, research tells us we tend to promote based on current performance, rather than determination of future potential. We also often ‘hire’ on IQ (Intelligence Quotient) and then occasionally need to ‘fire’ on EQ (Emotional Quotient). Consider what you are looking for in the future and assess based on future need, rather than current status. By achieving a richness of diversity across your organisation and its leaders, you will further strengthen the collective engagement and leadership by all members of the Board. The embedding and mainstreaming of diversity and inclusion does not eliminate the need for specific focused governance, anymore than this is the case for other strategic priorities such as finance or safety.

Progress towards diversity and inclusion objectives can be improved and enhanced by:

- Exploration of what steps can be taken to shift the balance of diversity and inclusion leadership, so that all members can play a more equal part
- Boards exerting their influence across the health system at a local / regional level, for example, through Board to Board dialogue
- Regular and visible prioritisation by the Board of the effectiveness of service delivery to diverse patient groups, the outcomes from tackling health inequalities and the success of tailored care
- Diversity and inclusion as a standing item on the Board’s agenda, supported by adequate time for discussion, debate and decisive action

- Effective, outcome-driven challenge of the diversity and inclusion agenda being encouraged and undertaken by all Board members
- A collective acknowledgement at Board level of the diversity and inclusion vision and priorities, with explicit linkage being made to organisational and NHS strategic objectives.

Tools which support the enhancement of Inclusive Boards can be found at the National Leadership Council, Leadership for Equality web pages:


**WAYS TO ASSESS TALENT**

Objective assessment is a key part of this process to avoid indirectly discriminating or building bias into the process.

A structured approach to assessing talent enables an organisation to benchmark, assess capability and align talent with the needs of the business. This will enable focus on the development areas required to meet organisational priorities, as well as informing recruitment decisions based
on future talent requirements and will enable HR to demonstrate the value of investing in talent development to business leaders. Some key questions to ask when assessing talent are:

- Is there an emphasis on job performance or on potential?
- Do you actively acquire the most talented players for your most key positions?
- Do you know if there is a ‘brain drain’ in your key positions?
- Does ability or talent have the strongest influence on your key players’ careers?
- Will your talent management strategy impact on your success?
- What are your most key positions and what are your sourcing strategies if not succession planning?
- Is your emphasis on remedy of weaknesses or on potential?
- When was the last open and frank conversation with each key post incumbent, no matter how difficult?
- Is the focus on ensuring posts are filled with a suitably qualified individual or with someone who is outstanding?
- How much have you recruited in your own image?
- How do you know if your current perception of talent will be suitable for the future needs of the organisation and the health economy? (Transformational leadership skills will be needed to lead our organisations in the coming years).

**The Organisation Readiness Checklist - Appendix 3** is a starting point.

A range of diagnostic tools and exercises are available on the NHS NW Leadership Academy website: [http://nwacademy.nhs.uk/ourfutures](http://nwacademy.nhs.uk/ourfutures) that could be used as part of the assessment process for individuals and there are a range of formal psychometric assessments that may be useful. The appendices at the back of this document will aid you in the gathering of necessary data and transferring into a talent map.

While the success of an individual in a role will depend on competence and their own aspiration, this alone is not a measure of who has the potential to progress and therefore organisations should consider implementing tools that can predict potential and future talent. By recruiting and investing in the development of an individual - and promotion where appropriate - there is an increased probability of retaining that individual.

Things you may consider when looking to identify talented individuals are:

- Individual aspiration
- Enhance specific performance in current role
- Who is asking challenging questions?
- Who is taking on stretch opportunities?
- Who is driving change?
- Who is quietly ‘getting on with things’?
- Who is willingly ‘putting up their hand’?
- and other attributes outlined on page 10 of the toolkit

We also supply in the People - Performance and Potential Grid - Appendix 5 & 6 definitions relating to each box on the Talent Potential and Performance Grid, supported by a bank of questions to be used during your talent conversations.

Examples of development you may consider and the possible interventions which may be considered (and delivered by organisational development interventions) are available at [http://www.nwacademy.nhs.uk/ourfutures](http://www.nwacademy.nhs.uk/ourfutures). 

Along with spotting talented individuals (which may be subjective), other methods can be used to triangulate your findings more objectively.

A **personality test** is a questionnaire or other standardised instrument designed to reveal aspects of an individual’s character or psychological makeup. The first personality tests were developed in the early 20th century and were intended to ease the process of personnel selection, particularly in the Armed Forces. Since these early efforts, a wide variety of personality tests have been developed, notably the MBTI (Myers Briggs) and a number of tests based on the Five Factor model of personality, 16 or 32 elements also. Today, personality tests are used in a range of contexts, including individual and relationship counselling, career planning and career development, but can only be used in employee recruitment and selection if it is a validated recruitment tool (validated by The British Psychological Society).

**Psychometrics** is the field of study concerned with the theory and technique of psychological measurement of knowledge, abilities, attitudes, educational measurement (and includes personality traits). The field is primarily concerned with the construction and validation of measurement instruments such as questionnaires and tests. These tests are constructed of instruments and procedures for measurement. Those who practice psychometrics must possess a specific psychometric qualification, and while many are clinical psychologists, other professionals can administer the tools,
but all are qualified in administration, assessment and feedback of results.

**An Assessment Centre** is a place at which a person, such as a member of staff, is assessed to determine their suitability for particular roles. The candidate’s aptitude determined by a variety of techniques including interviews, examinations, role-plays, scenarios and tested against agreed criteria and competencies.

**Role profiles and job description mapping**, list descriptions, key responsibilities, and requisites but also focus on less tangible behavioural competencies. Linked to each competency are indicators of how effectively employees should meet each requirement. Being able to describe job profiles and competencies, facilitates personal selection, awareness, role comprehension, and potential for reaching the next step.

**360 degree feedback** is a multi rater, multisource assessment and is feedback that comes from all around an employee. ‘360’ refers to a circle, with an individual figuratively in the centre of the circle. Feedback is provided by direct reports, peers, and supervisors. It also includes a self-assessment and in some cases, feedback, from external sources such as customers and suppliers or other interested stakeholders. It may be contrasted with ‘upward feedback,’ where managers are given feedback by their direct reports, or a ‘traditional performance appraisal’ where the employees are most often reviewed only by their managers.

**Stretch opportunities** with robust support and analytical post stretch review, give an individual the opportunity to enhance their experience and act at a higher level than their substantive post currently allows. Stretch opportunities should be targeted at addressing areas for development identified with the individual as part of their performance and potential discussion. Clear objectives and milestones should be built into the period of the stretch opportunity to measure the progress towards meeting these development needs, as well as the availability of a mentor to support the individual to ensure maximum value is achieved by the individual and the organisation.

A range of both developmental and assessment examples can be found at [http://www.nwacademy.nhs.uk/ourfutures](http://www.nwacademy.nhs.uk/ourfutures) with explanations about when and best to use them.

Remember, formal assessment is great and informative, but changes in performance and future development will be directly correlated to the quality of the feedback of any assessment or development intervention. Ensure your feedback is undertaken by a competent mentor, coach, facilitator or assessor.
In ensuring an organisation has a multi-level succession plan, there should always be at least one successor identified for each key role in the organisation.
In ensuring an organisation has a multi-level succession plan, there should always be at least one successor identified for each key role in the organisation. By identifying these individuals well in advance of any specific need, they can be supported in targeted development and stretch opportunities to ensure they are fully prepared to take on the role and challenge when it arises. This ensures the organisation avoids any panic situations by a key post holder handing in their notice and no successor identified, or a potential successor not being at a stage where they are ready to step into the role. This may only be a temporary solution but provides resilience at all times.

By having an effective internal talent management strategy and process, organisations will be prepared to respond to any future political reforms and restructure.

Open and honest conversations about temporary cover should be had to avoid the situation of staff assuming they will naturally ‘succeed’.

Identifying at what stage an employee is in their current career or post can aid succession planning within departments and an organisation.

Potential stages could be:

1. Being ready to do the next job now (0 – 12 months)
2. Being ready for a stretch position within 1 – 3 years
3. Being ready for a stretch position within 3 – 5 years;
4. Being ready for job rotation/stretch at the same level
5. Being ready for lateral assignments on a temporary relief or project work.

The introduction of a ‘talent panel’ supports the embedding of a robust talent management system. This panel would ideally be made up of senior or Board level individuals tasked with:

- Championing the implementation of a talent management and development process within the organisation
- Overseeing the talent pools
- Sense checking the sources of information within their organisation
- Ensuring consistency and equality of opportunity and identification
- Actively managing career movements.

Emerging leaders are a vital part of the talent pipeline, the NHS NW Leadership Academy in collaboration with the Regional Emerging Leaders Steering Group and NW organisations will deliver an exciting and innovative approach to supporting these individuals as future leaders.

These delegates will have been identified as part of their organisation’s talent management process as individuals that demonstrate the potential, performance and have personal aspirations to progress within their career.
32% of employers recruited new talent to support business expansion.

(CMC - Best Practice Report)
How do we build a regional picture across very separate organisations and systems?

This toolkit is intended to provide organisations with the tools and templates to triangulate and test their internally gathered and tested data.

The NHS organisations in the North West all operate very different systems, of differing levels of complexity, and therefore data is not always gathered under the same principles, making comparisons difficult. However, we can use locally prepared data to inform future activity on a regional basis. This toolkit is intended to provide organisations with the tools and templates to triangulate and test their internally gathered and tested data.

By working with the toolkit, the data gathered will have some consistency and validity across the region. Previously there has been no national approach to talent management, however the National Leadership Academy proposes a talent management system that is built on a foundation of good practice with a shared model of leadership, talent performance and potential assessment. As a result talent can by systematically, inclusively, routinely and consistently assessed and identified at every level of the system.

The National Leadership Academy will also develop an industry wide model of effective leadership accreditation securing fit and proper development and assessment of leadership capability.

Most organisations are actively developing their talent and we have some fantastic examples of development initiatives across the North West. By all organisations having robust talent management systems embedded at all levels from point of appraisal, common themes and trends across the region, can be identified in sufficient time for development initiatives to be implemented to reduce risks to organisations resilience.

By having an embedded and effective talent management system, which informs the development of a fully integrated organisation business plan, as well as the annual cycle of procurement of training and development, activity will be aligned to support the needs of the individuals as well as the organisation.

Built into the stages of an internal talent management system, the ‘hand-off’ and ‘hand-up’ stages to outside support and to the NHS North West Leadership Academy and National Leadership Academy, will enable development to be handled at the most appropriate level.

The NHS North West Leadership Academy will ask NHS organisations in the North West to submit data detailing the supply available for the key roles in their organisation, and also detail any gaps or potential risk and undersupply for their organisation now and for future roles required to lead the organisation. By collating this data on a regional level we will have a picture of where short, medium and long term risks may lie by role, along with required skills.

The local role of your organisation is focussed on:

- Executive responsibility to lead an organisational talent panel to review and identify talent
- Talent spotters and talent panel activity
- Annual cycles alignment
- Links to transparent objectives
- Agreement and implementation of a process based on best practice which takes account of openness,
transparency and appraisal and performance procedures

- Talent identification, selection and development at a local level ensuring that the profile of leaders reflects the communities that they serve
- Demonstration of alignment of career paths with the organisation’s strategic direction and the development of care pathways
- ‘Hand off’ to regional level where development needs fall outside of local ability to deliver e.g. in terms of scope or uniqueness and economy of scale
- Creating and fostering conditions for talent leadership and development
- Guidance, tools and techniques to line managers
- Consideration of inclusive talent and climates that enable it to flourish.

Organisations will then ‘hand off’ their senior level talented leaders to the:

**NHS North West Leadership Academy**, whose role is to develop talented senior leaders, once identified within their organisation. In addition to this we:
- Gather research and evidence to support a process based on best practice
- Aggregate organisational data based on openness and transparency
- Work with the local level where there are efficiencies / quality benefits in relation to scale, scope and economies of scale
- Promote shared learning and act as a catalyst for the spread and adoption of good practice in relation to talent management
- Commission senior leadership development programmes
- Advise, link and connect sector and national colleagues where talent gaps, due to skills or demographics, are identified particularly where associated risk could have an impact on care and governance
- Tailor regional standards with a particular view to equality and diversity.

**SECTOR ROLE (NHS NORTHERN SECTOR)**

Some activity could be co-ordinated at a sector level when it makes good sense, based on:

- Geography – for example, due to low numbers regionally
- Value for Money – for example, commissioning under one contract
- Members/customer benefit being enhanced
- Expertise being available within the Northern Sector to lead, or prior experience and knowledge
- Return on investment for members is enhanced
- QIPP returns are multiplied
- Greater impact on system transformation achieved through shared learning and wider network opportunities
- Support based on previously commissioned bespoke products is beneficial or offers greater ROI.

In 2012/13, sector level collaboration based on national funding will focus on four main areas as achievable within a year:

1. Talent Management
2. Inclusion
3. Coaching and Mentoring activity
4. Emerging leaders initiatives.

**NATIONAL (NATIONAL LEADERSHIP ACADEMY)**

In turn the NHS NW Leadership Academy will ‘hand off’ development more appropriately delivered at a national level to the **National Leadership Academy** whose role is:

- To build common NHS leadership values and approaches. It’s work will be founded in the NHS Constitution and the NHS Leadership Framework
- To provide cutting edge expertise in leadership development, setting standards, frameworks and best practice – to make a difference to patient experience, clinical outcome and staff satisfaction
- To aid development where customer group development needs are unable to be offered regionally due to customer size, scale or uniqueness, and for where it would not be impactful or cost effective (i.e. Top Leaders – small specific professional groupings)
- To develop talent at a national level where regions/sectors have identified a specific pool requiring development (and this has been triangulated)
- Aggregation of regional/sector data
- To set standards to ensure value for money
- To lead on creating advocacy for improvement in talent management, articulate and support efforts at all levels as a partner
- To support research and development and in particular the impact of talent management and its correlation to the quality of care
- To maintain a focus on equality, diversity and inclusion.
In the NHS in the North West approximately 47% of our senior leaders are aged 50 years plus.
How do we actively support and continuously develop talent?

Talent alone is not always enough to guarantee success. It may be perceived that talented people act like the proverbial cream and automatically float to the top of their organisations. Research tells us that no matter how gifted, talented people need to work in organisations which nurture their talents and provide them with an increasingly larger stage upon which to test their abilities and potential.

By organisations working with individuals to support their continuous personal development and learning journey, and helping them to be the best they can be, an organisation develops and nurtures its future leaders. These leaders understand and uphold the culture of development and support with constructive challenge, to drive the organisation forwards and upwards to achieve its key outcomes of services and support to the local population, and the customers it serves.

By enhancing development discussions, development plans become more comprehensive and specific. Open conversations around future aspirations and suitability to move into other roles, need to be part of these development plans and discussions.

Your most talented people are also most likely to be actively testing the job market, and are most desirable to your competitors. Lack of career progression or development opportunities are cited as the main reasons why top talent seeks to leave.

By understanding the supply, potential and aspirations at all levels of your organisation, this informs the talent pipeline that supplies your organisation. This pipeline needs to be supported, refreshed and revisited so the supply is aware of the opportunities and process to support them in their learning journey.

By identifying the potential gaps in an individual’s experience and knowledge, it is easier to understand how these gaps can be addressed.

When considering development needs, aspirations and future career plans, with some of the changes in the NHS, consideration should be given to the benefits of sideways moves as well as upward progression. Sideways moves and stretch opportunities within the organisation are another way for an individual to experience new challenges and ways of working, therefore expanding their portfolio. By setting clear objectives that underpin the stretch opportunity or sideways move, the individual and their internal sponsor can monitor the achievement against these objectives and the progress and value of the opportunity.

Organisations can consider how these sideways moves can be promoted and facilitated as short term projects with specific aims, objectives and outcomes. This will require managers working together, to identify potential placements and opportunities coming up within their workstreams or departments that would benefit from a new perspective, and facilitate an internal colleague developing in their skills and experience, that may not be readily available in their current role.

Talent initiatives send a clear message to your employees – this is an organisation committed to investing in people and where talented individuals can flourish. Recognition for recruiting and developing talent also strengthens your employer brand and attracts new talent to the organisation (2011 Career Management Consultants Survey).

Sideways moves and stretch opportunities within the organisation are another way for an individual to experience new challenges and ways of working, therefore expanding their portfolio.
However, not all talented people will have jobs to 'rise' into, therefore a range of motivation, retention and job enrichment strategies need to be considered:

- Expand the job to include new, higher level responsibilities and re-assign responsibilities that your talent feels are routine and not stimulating
- Provide more authority for your talent to self-manage and make decisions
- Invite your talent to contribute to more important, department or organisation wide decisions and planning and provide more access to important and desirable meetings
- Provide more information by including your talent on specific mailing lists, in briefings and coach/mentor them personally
- Support your talent to undertake projects or personal and team stretch.
- Undertake personal development and personal awareness interventions. Examples of which can be found at: http://www.nwacademy.nhs.uk/ourfutures

http://www.cipd.co.uk/hr-resources/survey-reports/war-on-talent-talent-management-under-threat-uncertain-times.aspx

http://www.ashridge.org.uk/website/content.nsf

http://www.nwacademy.nhs.uk/ourfutures


http://www.kingsfund.org.uk/

http://www.oecd.org/home/

http://www.nihr.ac.uk
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Organisational Talent Management Flowchart

APPENDIX 2
Organisational Readiness Checklist - Rationale

APPENDIX 3
Organisational Readiness Checklist - Template
Appendix I

Organisation commitment to Talent Plan – Complete Organisational Readiness Checklist

(Appendix 2 & 3)

Identify Key roles in each ‘level’

(Appendix 4)

Identify your Talent - in partnership with individuals

(Appendix 6)

Plot outcomes on ‘Performance/Potential’

(Appendix 5)

Identify short term and medium term ‘Successors’ plot on ‘Future Resilience Map’

(Appendix 7/7A)

Identify risk areas – plan contingency

Test and agree action at a Talent Panel – agree data to be submitted to inform regional activity

Agree responsibilities – e.g. CEO to undertake Board level, Executive Lead to undertake direct reports etc

Verify your assumptions by triangulation of evidence with others & objective assessment
Organisational Readiness Checklist
Rationale – Talent Management:

BOARD LEVEL READINESS IN MANAGING TALENT AND DEVELOPMENT

It is the Board’s task to ensure that the processes are in place and to receive assurance that they are being used effectively to identify, develop and utilise the skills and resources of the staff of the organisation, particularly those in senior or crucial positions.

- **Talent** consists of those individuals who can make a difference to organisational performance, either through their immediate contribution or, in the longer term, by demonstrating the highest levels of potential.

- **Talent management** is the systematic attraction, identification, development, engagement, retention and deployment of those individuals who demonstrate talent to an organisation, either in view of their ‘high potential’ for the future, or because they are fulfilling business/operation-critical roles.

This definition underlines the importance of recognising developing, managing and retaining those individuals as part of a planned strategy for talent, as well as adopting the means for the Board to understand the utilisation of this investment. The following checklist provides overarching questions to assess Board and Organisational readiness.
ESTABLISHING CLEAR COMMITMENT, AN OVERALL STRATEGY AND DELIVERY PLANS

An effective organisation will recognise that an active talent identification, development and utilisation plan will require leadership and direction from the Board and senior officers. The Board should expect regular assurance that these plans are being progressed and are providing the organisation with improved performance and the means to manage the risks inherent in all senior staff transitions much more effectively and with less disturbance.

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<th>Questions to consider for talent management readiness – Does your organisation have…</th>
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<td>1</td>
<td>A clear commitment to talent management that underpins organisational vision and workforce plans?</td>
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<td>2</td>
<td>A model of talent management and development agreed at Board level?</td>
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<td>An active commitment at Board level to support and challenge high potential individuals?</td>
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<td>A talent management plan that aligns with strategic and operational plans?</td>
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<td>An active plan to ensure that the organisation is an employer of choice?</td>
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ENSURING EFFECTIVE LEADERSHIP, ACCOUNTABILITY AND ACTION FOR THE PLANS

Although this is a key Board responsibility, named individual executive accountability is important in ensuring that the plans are enacted throughout the organisation committed to:

- Identification of those in whom further investment will pay dividends
- The provision of development and challenge opportunities and utilisation of these talents in terms of promotion, projects and job enrichment/enlargement.

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<td>A CEO and Chair who both champion and offer leadership to the talent management programme?</td>
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<td>7</td>
<td>A named Executive Board Director responsible for developing a talent management development programme?</td>
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COMMUNICATING THESE PLANS

The Board’s commitment and the actions that follow will need to be understood throughout the organisation to enable staff to engage with the opportunities and to ensure that the talent pool is as wide as possible, not just determined through the personal relationships and knowledge of a small number of staff and managers who are more closely involved.

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<td>A clear process for communicating the talent and associated HR and development plans to all staff?</td>
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DEVELOPING A CULTURE OF TALENT DEVELOPMENT – ENCOURAGING EFFECTIVE BEHAVIOURS

The focus on potential and talent challenges the common patterns of many organisations to concentrate only on current levels of performance. This way of thinking constantly asks such questions as:

- Are we using the sum talent of our staff to best effect?
- Are there opportunities for developing skills, capacity and understanding that will enlarge our overall talent pool as well as improve performance?
- Can we reshape and rework our existing jobs, tasks and roles to use our staff more effectively?
- Are we encouraging our staff to innovate within their existing roles/workplace and can we extend this to a wider perspective on the work of the organisation?

An additional benefit of this culture is that it becomes commonplace for mentoring/support/coaching to be acceptable at all levels and it is then focused on sharing learning and building understanding together.

Questions to consider for talent management readiness – Does your organisation have…

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<td>Organisational behaviours that reflect and encourage robust talent management within the organisation?</td>
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<td>Experience of ability to fill temporary or permanent senior positions from within the organisation?</td>
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**INvolving and Engaging Others – A Talent Panel**

A talent panel is a proven way of engaging a team of managers and clinicians in the processes of identifying organisational talent and shaping the programmes/actions to ensure that potential is developed, challenged and used effectively. The panel offers an effective mechanism to enable a pan professional and clinical group, to explore possibilities for the movement of skills and potential in innovative ways across the organisation.

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<td>11 The means for the Board to identify and use effectively its pool of talented individuals?</td>
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<td>12 A talent panel to oversee those within the talent pools?</td>
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BUILDING INTERNAL CAPACITY AND ORGANISATIONAL RESILIENCE

Organisations that have flexibility in terms of skills transfer, team working and boundary crossing between different departments, professions and clinical specialities, are much more likely to meet changing circumstances with energy and capacity. An active commitment to building on potential and managing talent is likely to offer a strong reinforcement to a process of developing a flexible and robust staff team.

UNDERSTANDING AND MITIGATING THE RISKS TO ORGANISATIONAL RESILIENCE

A crucial element of building a strong and flexible workforce is to develop an understanding of the risks associated with:

- Loss or gaps in capacity due to senior or service crucial staff movements
- Changes in practice demanding new skills
- Loss of organisational memory
- Time taken to en-skill or re-skill staff to cover gaps
- Lack of confidence in the organisation as a good employer if internal candidates are rarely appointed/suitable for appointment.

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<td>13</td>
<td>A clear understanding of the Board’s resilience risks?</td>
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<td>A similar understanding of the resilience risks to the rest of the organisation?</td>
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### Questions to consider for talent management readiness – Does your organisation have…

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<td>15</td>
<td>A strategy for the mitigation of Board and organisational resilience risks?</td>
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<td>16</td>
<td>A process for consideration of the risks of not utilising talent management within the organisation?</td>
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**RESOURCING AND SUPPORTING THE PROCESS**

The Board will need to recognise and approve the resource implications of the plan and assess this against the costs of not meeting a number of the risks identified above.
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<td>Tools to verify readiness, status and potential of staff?</td>
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<td>18</td>
<td>A clear and well implemented approach to senior management, clinical and executive appraisal?</td>
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Access and use of tools and data from a range of sources such as performance review, annual appraisals and internal development programmes, can be supplemented by development or assessment centre approaches, including individual profiles, psychometric assessments, team exercises etc. The key for a Board is to ensure internal data is used alongside any external assessments and that any processes are able to support the management and use of talent rather than just provide an analysis of potential.
Questions to consider for talent management readiness – Does your organisation have...

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<td>19</td>
<td>Open and productive discussions regarding readiness status and potential for development opportunities?</td>
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<td>20</td>
<td>A demonstrable coaching and developmental culture?</td>
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<td>21</td>
<td>A senior team who are skilled in, and able to offer mentoring and coaching support?</td>
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- Enable staff with projects or challenges to face new ways of working
- Help reframe issues, problems and dilemmas

The Board should ensure that a culture of providing such support is available throughout the organisation.
PROGRESS REVIEW AND DEVELOPING THE APPROACH

The Board will need to be assured that all of the above is planned and executed within a high demand environment. The big challenge, as with all strategic assurance, is to have sufficient understanding of the details, without intruding into the operation of the talent management programme. An annual review of the talent management programme would be a minimum.

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<td>A monitoring system for implementation and execution of the talent management and leadership development plans?</td>
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<td>An active and regular review by the Board of its approach to talent management?</td>
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A talent management plan that aligns with strategic and operational plans?

An active plan to ensure that the organisation is an employer of choice?

A CEO and Chair who both champion and offer leadership to the talent management programme?

A named Executive Board Director responsible for developing talent management development programme?

A clear process for communicating the talent and associated HR and development plans to all staff?

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|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
Appendix 4

IDENTIFICATION OF KEY ROLES

Working through the seven questions below, will aide in the identification of whether a role is ‘key’ or not:

1. Is this a significant leadership role?
2. Is there a known scarcity of skills in this role?
3. Is the role integral to current operational activity?
4. Is there a significant people / team management aspect?
5. Is this a role accountable for the delivery of strategic priorities?
6. Is the role a bridge between the organisations and “external stakeholder”?
7. Is there a known spike in demand for this role based on planned retirements?

In addition to these questions, following transformation of services, consideration also needs to be given to:

What are your key roles and skills needed in the next 3-5 years?

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<tr>
<td>2. YES</td>
<td>NO</td>
</tr>
<tr>
<td>3. YES</td>
<td>NO</td>
</tr>
<tr>
<td>4. YES</td>
<td>NO</td>
</tr>
<tr>
<td>5. YES</td>
<td>NO</td>
</tr>
<tr>
<td>6. YES</td>
<td>NO</td>
</tr>
<tr>
<td>7. YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ROLE TITLE</th>
<th>YES/NO IN RESPONSE TO THE 7 QUESTIONS ABOVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. YES</td>
<td>NO</td>
</tr>
<tr>
<td>2. YES</td>
<td>NO</td>
</tr>
<tr>
<td>3. YES</td>
<td>NO</td>
</tr>
<tr>
<td>4. YES</td>
<td>NO</td>
</tr>
<tr>
<td>5. YES</td>
<td>NO</td>
</tr>
<tr>
<td>6. YES</td>
<td>NO</td>
</tr>
<tr>
<td>7. YES</td>
<td>NO</td>
</tr>
</tbody>
</table>
## Appendix 5

### PEOPLE – PERFORMANCE AND POTENTIAL GRID

<table>
<thead>
<tr>
<th>Not likely to be ready (NL)</th>
<th>Emerging Talent (ET)</th>
<th>Developing Talent (DT)</th>
<th>Ready Now (RN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shows limited potential to develop at current level within 3 – 5 years or shows no motivation or aspiration to want to progress.</td>
<td>Shows potential and motivation to develop at current level in some respects. Shows future promise and expected to progress within 3 – 5 years.</td>
<td>Demonstrates the potential and motivation to develop at current level to progress within 1 – 3 years.</td>
<td>Demonstrates the potential motivation and experience to perform at next level. In next 12 months, should focus on developing leadership behaviours at next level.</td>
</tr>
</tbody>
</table>

### Exceeds Expectations

<table>
<thead>
<tr>
<th>NL1 – Expert (peak performance)</th>
<th>ET1 – Deep Professional (in own field)</th>
<th>DT1 – Key Generalist (pivotal and flexible)</th>
<th>RN1 – Consistent Talent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuous high performance</td>
<td>High performance in own field</td>
<td>High performance with consistency of results across a variety of assignments</td>
<td>High performer with lots of potential and capacity for performance advancement</td>
</tr>
<tr>
<td>Limited upward potential</td>
<td>Consistent results</td>
<td>Moderate potential</td>
<td>Highest levels of performance and potential</td>
</tr>
<tr>
<td>Usually possesses special experience / technical knowledge that would be difficult to replace</td>
<td>Shows upward potential</td>
<td>Secondary pool to fill critical positions; perhaps move one level; likely to shift to key or high professional roles over time</td>
<td>Demonstrates mastery of current assignment</td>
</tr>
<tr>
<td>Significant value to the organisation</td>
<td>Emergent skills</td>
<td>True organisation asset</td>
<td>True organisation asset</td>
</tr>
<tr>
<td></td>
<td></td>
<td>First call to fill critical positions</td>
<td></td>
</tr>
</tbody>
</table>

### Meets Expectations

<table>
<thead>
<tr>
<th>NL2 – Pace Setter (stable/critical)</th>
<th>ET2 – Future Professional (narrow field)</th>
<th>DT2 – Solid Generalist (solid and adaptable)</th>
<th>RN2 – Future Talent (emerging – capacity for key roles.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfactory performance</td>
<td>Satisfactory performance with moderate potential over time</td>
<td>Satisfactory performance</td>
<td>Individual with high potential</td>
</tr>
<tr>
<td>Limited upward potential – may be related to aspirations</td>
<td>Showing upward potential</td>
<td>Meets expectations</td>
<td>Satisfactory performance</td>
</tr>
<tr>
<td>Great value to organisation</td>
<td></td>
<td></td>
<td>Has the capacity to be a consistent talent</td>
</tr>
<tr>
<td>Stable and delivers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Partially Met Expectations

<table>
<thead>
<tr>
<th>NL3 – Take action to address (issue)</th>
<th>ET3 – Challenge Professional</th>
<th>DT3 – Future Generalist in Training (needs stretching)</th>
<th>RN3 – New Role (budding talent)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low level of performance</td>
<td>Showing potential but low performance</td>
<td>Low performance but showing moderate potential over time</td>
<td>Have yet to demonstrate results, or high potential in a new position / development assignment</td>
</tr>
<tr>
<td>Limited upward potential may be related to aspirations</td>
<td></td>
<td>Needs pushing and stretching – may be bored or under-used</td>
<td>Now to post or assignment</td>
</tr>
<tr>
<td>Individual will need to change results and behaviour quickly</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Appendix

<table>
<thead>
<tr>
<th>Partially Met Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below “met expectations” against performance objectives and behaviours required at level</td>
</tr>
<tr>
<td>NL3 – Take action to address (issue)</td>
</tr>
<tr>
<td>LT3 – Challenge Professional</td>
</tr>
<tr>
<td>DT3 – Future Generalist in Training (needs stretching)</td>
</tr>
<tr>
<td>RN3 – New Role (budding talent)</td>
</tr>
<tr>
<td>Have yet to demonstrate results, or high potential in a new position / development assignment</td>
</tr>
<tr>
<td>Now to post or assignment</td>
</tr>
</tbody>
</table>

Exceeds Expectations

Outstanding performance against objectives and behaviours required at level.

Meets Expectations

Meets the expectations for performance against objectives and behaviours required at level.

Partially Met Expectations

Below “met expectations” against performance objectives and behaviours required at level.
**Performance Potential Identification and Development Guide**

**Ready Now Talent (0 – 12 Months)**

- **RN 1 Consistent Talent**
  - High performer with lots of potential and capacity for immediate advancement.

**Definition**
- Highest levels of performance and potential
- Demonstrates mastery of current job / assignment
- Aspires to progress
- True organisation asset
- First call to fill critical or emergency positions

**Development Considerations**
- Future role, exposure to ‘acting / step up’ posts
- Identify ‘appropriate’ career path
- Immediate move and longer term view
- Stretch assignments, giving depth and breadth of experience
- Reinforce value of individual to organisation, use praise and recognition appropriately
- Raise profile and exposure

**Bank of Questions**
- What do we need to do to ensure continuous optimum performance?
- Where do you see your career path both now and in the immediate future i.e. next 12 months?
- What could prevent you progressing/realising your aspirations?
- What ambition do you have for the future?
- What do you feel are the ‘new’ required leadership behaviours?
- What do you see as your immediate next move and what would you imagine the next one to be?
- What experiences do you need to make that happen?
- What skills and knowledge do you need to develop to be more rounded?
- What personal styles help you?
- What resources do you need to help you – personal, organisational or professional?
- What personal styles hinder you?
- What is your ‘profile’ within the organisation and how might this be developed?
- What can get in your way of delivery?
- What would colleagues say about your leadership and delivery ability at the various levels (manager, peer, direct report)?
- How do you influence where you don’t have power?
- What are your strategies to motivate your team?
- What de-rails your performance as a team member?
- In your opinion, are there areas of the corporate agenda that could be developed, and what part would you play?
- What do you do with good ideas?
- Do you need to further develop creativity or business acumen?
- What other professional skills would you like to develop?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- How do you manage your own work/life balance?

**Possible Interventions**
- 360 degree feedback / other self awareness exercises
- Mentoring (self and others)
- Secondments (external)
- High profile presentations / exposure
- Stretch outside of comfort zone
- Placement outside of organisation
- Develop skills / knowledge – next role
- Leadership programmes
- Exposure to multi-cultural, multi-business, teams or groups where an outcome is needed with no direct authority
- An understanding of organisational development, interventions and techniques
- Further education
- Coaching
- Action Learning Set
- Add in your own local development activity
RN 2 – Future Talent

Satisfactory performer with the ability and potential to be a consistent talent.

Definition
- Individual with high potential
- Satisfactory performance
- Has the ability and potential to be a consistent talent
- Aspires and has ambition

Development Considerations
- Current role development
- Increase current performance/delivery
- Discuss future ambition/aspirations
- Specific competencies, experience and learning needed for future roles

Bank of Questions
- What do you think you need to be doing to raise your performance levels higher?
- What holds you back at times?
- Are you aware of anything that holds the team back?
- Where might your next career steps take you?
- How do you think we can increase your exposure to demonstrate your capabilities?
- What can you do to manage constraints/barriers to your progression?
- Do you feel informed and involved in the organisation’s decision-making?
- What can get in your way to perform/deliver?
- Where do you see your career path both now and in the future i.e. next 2-3 years?
- What could prevent you progressing/realising your ambition?
- What do you feel are the ‘new’ required leadership behaviours?
- What do you see as your next move and what could you imagine the next one after that to be?
- What experiences do you need to make that happen?
- What skills and knowledge do you need to develop?
- What personal styles help you?
- What resources do you need to help you – personal, organisational and professional?
- What personal styles hinder you?
- What is your ‘profile’ within the organisation and how might this be developed?
- What would colleagues say about your leadership and delivery ability at the various levels (manager, peer, direct report)?
- How do you influence where you don’t have power?
- What are your strategies to motivate your team?
- Are there areas of the corporate agenda that could be developed and what part would you play?
- What do you do with good ideas?
- Do you need to further develop creativity or business acumen?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- How do you manage your own work/life balance?

Possible Interventions
- Managing personal growth
- 360 degree feedback
- Secondments / stretch opportunities
- Mentoring (as mentee) or as mentor
- Coaching 1:1
- Job rotations / exposure to broader Trust agenda and priorities
- Skills / knowledge – next role
- Projects – working outside functional expertise; working on a failed project in a recovery phase
- Add in your own local development activity
**RN3 – New Role**  
*(budding talent)*

High potential in new job or under-performing.

**Definition**
- Have yet to demonstrate results, or high potential in a new position / development assignment / loss of motivation.

**Development Considerations**
- Current role skills and behaviours
- Direction and support
- Motivate, mentor and coach
- Development plan to improve performance and demonstrate potential over the next 12 months
- With evidenced performance could move to RN2 or RN1 swiftly

**Bank of Questions**
- How do you feel about your development so far?
- What motivates you in the work place?
- What are your major challenges in the next year?
- Where do you think you will be in a year, in terms of both potential and performance?
- What impact on your pace have changes in the organisation or changes in your role caused?
- What do you need in order to become effective more quickly?
- Who do you need to support that?
- What do you get from your team?
- Do you know where you want to be in the future?
- What have you learnt about yourself in your career so far?
- What would you have done differently in your career so far?
- What is your profile perceived as by the organisation and how might this be developed?
- Are there any barriers preventing improved performance?
- What do we need to do to ensure continuous optimum performance?
- Where do you see your career path both now and in the immediate future i.e. next 12 months?
- What could prevent you progressing?
- What ambition do you have for the future?
- What do you feel are the ‘new’ required leadership behaviours?
- What experiences do you need to make that happen?
- What skills and knowledge do you need to develop?
- What personal styles help you?
- What resources do you need to help you?
- What personal styles hinder you?
- What would colleagues say about your leadership and delivery ability at the various levels (manager, peer, direct report)?
- How do you manage your own work/life balance?
- What are your strategies to motivate your team?
- What de-rails your performance as a team member?
- Are there areas of the corporate agenda that could be developed and what part would you play?
- What do you do with good ideas?
- Do you need to further develop creativity or business acumen?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- How do you manage your own work/life balance?

**Possible Interventions**
- Coaching / buddying on the job
- Monthly contact to assess / re-assess and keep on track
- Induction (culture / systems / processes)
- Basic knowledge and skills training
- Encouragement to keep on going and gain organisational acceptance
- Realistic management of time scales and expectations
- Possibly some career diagnosis – would need to be carefully handled in terms of raising expectations
- Reassess in next cycle of planning / performance management
- Challenge with clear expectations
- Clear and stretching objectives with regular review
- Add in your own local development activity
DT1 – Key Generalist
(pivotal and flexible)
High performance in a variety of areas.

Definition
- High performance with consistency of results across a variety of assignments
- Flexible, and could fill short term gaps
- Moderate potential
- Could fill critical positions; perhaps move one level; likely to shift to key or high professional post over time

Development Considerations
- Motivational stretch to enhance fulfilment
- Further developments in role giving both breadth and depth of experience
- Identify ‘appropriate’ career path
- Reinforce value of individual to organisation, use praise and recognition appropriately

Bank of Questions
- What do we need to do to ensure your continuous performance and maintain motivation?
- What gets in the way of your performance?
- Where do you see your career path and level of ambition?
- What could prevent you progressing?
- What do you see as your next move?
- In what timeframe (realistic)?

What experience do you need to gain to make that happen?
What exposure do you need?
Do you have the necessary business and organisational skills?
What other styles/skills would benefit you?
What skills and knowledge do you need to develop / move into the first role?
What resources do you need to help you?
What support do you get from your manager, peers, direct reports?
What would your team say about your leadership and delivery ability?
What is your profile within the organisation and how might this be developed?
What would your team say your style is?
How might the organisation better utilise your skills and experience?
What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
How do you influence in areas you don’t have power in?
What scope do your ‘networks’ have?
What would colleagues say about your leadership style and performance?
What do you do with good ideas?
What derails you?
How do you manage your work/life balance?
What do you like to ‘specialise’ in?

Possible Interventions
- Managing personal growth
- Further education
- 360 degree feedback
- Mentoring (as mentee)
- Coaching 1:1
- Develop skills / knowledge / competencies
- Projects to develop competencies and develop further depth and breadth of experience
- Secondments into development assignment to stretch
- Projects – using existing strengths with some future orientation
- Develop skills / knowledge / competencies – current role
- Diagnosis of career options may be appropriate
- Future leader programme
- Engage in training others
- Add in your own local development activity
**DT2 – Solid Generalist**  
*(Solid and adaptable)*

Satisfactory performance with moderate potential.

**Definition**
- Satisfactory performance with moderate potential over time
- Meets expectations
- Solid, steady team member

**Development Considerations**
- Current role and development opportunities e.g. acting-up arrangements
- Enhance current performance
- Future career considerations
- Discuss future aspirations and ambition
- Consider developmental assignment
- Identify factors which motivate or demotivate individual and affect performance

**Bank of Questions**
- How satisfied are you with your performance in your current role?
- What would you need to do to increase your performance in your current role?
- How do you see your career progressing?
- How would you like to achieve this?

- What do you feel your particular strengths are and how can the organisation best utilise them?
- How can we continue to build and develop these?
- How do you feel we could utilise your strengths even more?
- Is there anything preventing improved performance?
- Do you feel informed and involved in the organisation’s decision making?
- What do we need to do to ensure continuous performance and maintain motivation?
- What gets in the way of performance?
- Where do you see your career path and level of ambition?
- What could prevent you progressing?
- What do you see as your next move?
- In what time frame (realistic)?
- What experience do you need to gain to make that happen?
- What exposure do you need?
- Do you have the necessary business and organisational skills?
- What other styles/skills would benefit you?
- What resources do you need to help you?
- What support do you get from your manager, peers, direct reports?
- What is your profile within the organisation and how might this be developed?
- What would your team say your style is?
- How might the organisation better utilise your skills and experience?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- What scope do your ‘networks’ have?
- What do you do with good ideas?
- How do you manage your own work/life balance?

**Possible Interventions**
- Managing personal growth
- Further education
- 360 degree feedback
- Secondments into development assignment to stretch (with support)
- Mentoring (as mentee)
- Coaching 1:1
- Projects / development areas
- Develop skills / knowledge / competencies – current role
- Diagnosis of career options may be appropriate
- Development to improve current performance
- Add in your own local development activity / processes
DT3 – Future Generalist in Training (needs stretching)

Moderate potential but under performing.

Definition
- Low performance but showing moderate potential over time
- Needs pushing and stretching – may be bored or under used
- Could be in the wrong job

Development Considerations
- Current role and factors that could motivate the individual more
- Ambition discussion
- Understanding barriers
- Current performance and future improvements

Bank of Questions
- How would you rate your performance at present?
- What standard of performance would you suggest you deliver?
- What do you require to enable you to enhance your performance?
- How can we support you to achieve enhanced performance?
- Do you wish to develop?
- What are the barriers or blocks to success?
- Who “owns” these barriers/blocks?
- What do you consider your particular strengths to be?
- What areas do you need support with?
- How can we assist you to build and develop these?
- How do you identify opportunities for growth and new experiences and learning?
- What motivates you to come to work?
- Do you feel informed and engaged in the organisation’s business planning process?
- What part in the team do you play?
- What do we need to do to ensure continuous performance and maintain your motivation?
- What gets in the way of your performance?
- Where do you see your career path and level of ambition?
- What could prevent you progressing?
- What do you see as your next move?
- In what time frame (realistic)?
- What experience do you need to gain to make that happen?
- What exposure do you need?
- Do you have the necessary business and organisational skills?
- What other styles/skills would benefit you?
- What skills and knowledge do you need to develop / move into the first role?
- What resources do you need to help you?
- What support do you get from your manager, peers, direct reports?
- What is your profile within the organisation and how might this be developed?
- What would your team say your personal style is?
- How might the organisation better utilise your skills and experience?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- Do you influence in areas you don’t have ‘power’ or ‘mandate’ in?
- What scope do your ‘networks’ have?
- What would colleagues say about your leadership style and performance?
- What do you do with good ideas?
- How do you manage your own work/life balance?

Possible Interventions
- Identify interventions to motivate and engage
- Swift action on improvement plan with tight timescales
- Open conversation and role review.
- Challenge with appropriate level of support (high support and regular contact)
- Coaching for performance
- Career counselling
- Quick remedial targeted development activity
- Formalised performance management-dependent upon timescale
- Add in your own local development activity /processes
**EMERGENT TALENT (READY IN 3 – 5 YEARS)**

- **ET1 – Deep Professional (in own field)**

  High performance in own field with consistent results.

**Definition**
- High performance in own field
- Consistent results
- Shows upward potential
- Emergent skills

**Development Considerations**
- Current role
- Stretch opportunities out of field
- Aspirations and exposure
- Reinforce value to organisation, use praise and encouragement
- Incremental progression plan

**Bank of Questions**
- What do we need to do to ensure continuous performance?
- Where do you see your career path both now and in the future i.e. next 3-5 years?
- What do you see as your next move?
- What experience do you need to gain to make that happen?
- What skills and knowledge do you need to develop / move into the role?
- What resources do you need to help you?

**Possible Interventions**
- Managing personal growth
- 360 degree feedback
- Job rotations
- Build skills / knowledge required for current role
- Further professional qualification to enhance role e.g. accountancy, management etc
- Manage current performance
- Ensure feedback is given
- Mentoring
- Coaching
- Exposure
- Robust development planning
- **Add in your own local development activity**

- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
ET2 – Future Professional (narrow field)

Satisfactory performance and showing upward potential.

Definition
- Satisfactory performance
- Showing upward potential
- Meets experience

Development Considerations
- Current role development
- Improve strengths and motivation
- Increase current performance in role
- Stretch projects to evidence ability

Bank of Questions
- What do you feel your particular strengths are?
- How can we continue to build and develop these?
- In terms of the skills / knowledge and competencies what areas do you feel need developing in order to improve your current performance?
- Are there any specific issues that are stopping you performing at an even higher level?
- How can we address these?
- What is your preferred learning style and which method would best suit you?
- How satisfied are you with your performance in your current role?
- What would you need to do to increase your performance in your current role?

Possible Interventions
- Managing personal growth
- 360 degree feedback
- Job rotations
- Build skills / knowledge required for current role
- Professional qualifications e.g. management, baseline requirements for current role
- Managing current performance
- Mentoring
- Coaching
- Exposure / experience
- Add in your own local development activity

How do you see your career progressing?
How would you like to achieve this?
What do you feel your particular strengths are and how can the organisation better utilise them?
How can we continue to build and develop these?
How do you feel we could utilise your strengths even more?
Is there anything preventing improved performance?
Do you feel informed and involved in the organisation’s decision making?
What do we need to do to ensure continuous performance and maintain motivation?
What gets in the way of performance?
Where do you see your career path and level of ambition?
What could prevent you progressing?
What do you see as your next move?
In what time frame (realistic)?
What experience do you need to gain to make that happen?
What exposure do you need?
Do you have the necessary business and organisational skills?
What other styles / skills would benefit you?
What resources do you need to help you?
What support do you get from your manager, peers, direct reports?
What is your profile within the organisation and how might this be developed?
What would your team say your style is?
How might the organisation better utilise your skills and experience?
What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
What scope do your ‘networks’ have?
What do you do with good ideas?
How do you manage your own work / life balance?
**ET3 – Challenge Professional**

Showing potential but low performance.

**Definition**
- Limited drive or motivation
- Showing potential, but low level performance
- Occasional sparks of brilliance
- Bright, new ideas and creative solutions

**Development Considerations**
- Current role development
- Use appropriate performance improvement plan
- Understand aspirations, motivators and work importance

**Bank of Questions**
- How do you feel about your current performance?
- What factors have affected the present situation?
- What actions have been taken and what was the outcome?
- What other resources need to be utilised?
- What are your strengths?
- How can we support you to improve your performance?
- How would you rate your performance at present?
- What standard of performance would you suggest you deliver?
- What do you require to enable you to enhance your performance?
- How can we support you to achieve enhanced performance?
- Do you wish to develop?
- What are the barriers or blocks to success?
- Who ‘owns’ these barriers/blocks?
- What do you consider your particular strengths to be?
- What areas do you need support with?
- How can we assist you to build and develop these?
- Identify opportunities for growth and new experiences and learning.
- What motivates you to come to work?
- Do you feel informed and engaged in the organisation’s business planning process?
- What part in the team do you play?
- What skills and knowledge do you need to develop / move into the first role?
- What resources do you need to help you?
- What support do you get from your manager, peers, direct reports?
- What is your profile within the organisation and how might this be developed?
- What would your team say your personal style is?
- How might the organisation better utilise your skills and experience?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- Do you influence in areas you don’t have ‘power’ or ‘mandate’ in?
- What scope do your ‘networks’ have?
- What would colleagues say about your leadership style and performance?
- What do you do with good ideas?
- How do you manage your own work/life balance?

**Possible Interventions**
- Appropriate skills, knowledge and attitude development in current role
- Interventions related to de-motivators or ‘de-railers’ (if there is evidence that these will result in improving performance)
- Action taken quickly for remedial and targeted development
- Projects (use as measure of competencies for next role as well as playing to strengths)
- Managing personal growth
- Further education
- 360 degree feedback
- Mentoring (as mentee)
- Secondments – internal
- Coaching 1:1
- Career counselling
- Clearly define the areas of poor performance, measured against criteria technical procedures, Leadership Framework etc
- Develop agreed plan with individual with key actions and timescales for delivery
- Have monitoring process in place for delivery plan
- Manager to give regular feedback on performance
- Formalised performance management dependent upon time scale – the appropriate formal procedure should be applied
- Add in your own local development activity
**NOT LIKELY TO BE READY**

**NL1 – Expert / Peak Performance**
Continuous high performance with limited upward potential.

NOT IN A POSITION TO PROGRESS DUE TO:
- Aspiration
- Personal decisions
- Motivation
- Limited potential

**Definition**
- Continuous high performance
- May have limited upward potential though this may relate to the desire/aspiration to progress
- Usually possesses special experience / technical knowledge that would be difficult to replace
- Usually has excellent relationships with internal and external stakeholders
- Significant value to the organisation

**Development Considerations**
- Current role development
- Utilise strengths / motivate / excite
- Work with individual to reduce barriers that prohibit progress
- Retrain in position / wider portfolio
- Reinforce value of individual to organisation, use praise and recognition appropriately

**Bank of Questions**
- What are your aspirations for the future?
- What do you feel your particular strengths are?
- How can we continue to build and develop these?
- How do you feel we could utilise your strengths even more?
- Given the changing NHS, what new skills/competencies do you need to develop to maintain your current performance in this new climate?
- What would motivate you in terms of development and your current role?
- How can we best meet this need?
- How do you ‘role model’ the next generation?
- What motivates you to remain in this employment?
- Do you feel you have any areas for improvement that would help you maintain your performance within this role?
- What else will help you to continue producing your current levels of high performance?
- What personal styles help you?
- What resources do you need to help you – personal, organisational and professional?
- What personal styles hinder you?
- What is your ‘profile’ within the organisation and how might this be developed?
- What would colleagues say about your leadership and delivery abilities at the various levels (manager, peer, direct report)?

**Possible Interventions**
- Managing personal growth
- 360 degree feedback – to look at other competencies beyond their role profile
- Mentoring (as mentor) – maybe external
- Secondments – external to consider other alternative work methods
- Coaching 1:1 – external
- Develop skills / knowledge / competencies for a potential other role
- Transferrable skills in different work environment
- Stretch projects – this could then be utilised to assess potential to progress
- Utilise as ‘subject matter expert’ in wider forums

**Add in your own local development activity**
NL2 – Pace Setter (stable/critical)

Satisfactory performance with limited upward potential.

Definition

- Satisfactory performance
- Limited upward potential though this may relate to the desire/aspiration to progress
- Great value to organisation, stable and delivers

Development Considerations

- Current role development
- Utilise strengths/motivate/excite
- Increase current performance
- Check learning styles and motivators

Bank of Questions

- What aspirations do you have for the future?
- How would you consider you are performing in your current role? (dependent on the answer manager may need to offer feedback)
- What strengths have you identified?
- What factors have affected the present situation?
- How might we support you to enhance your performance?
- Given the changing NHS context, what skills are required for this new environment?
- What new skills do you require for development?
- What skills and knowledge do you need to develop / move into the first role?
- What resources do you need to help you?
- What support do you get from your manager, peers, direct reports?
- What is your profile within the organisation and how might this be developed?
- What would your team say your personal style is?
- How might the organisation better utilise your skills and experience?
- What more could you do to improve the quality of services, patient experience and the health and wellbeing of the workforce?
- Do you influence in areas you don’t have ‘power’ or ‘mandate’ in?
- What scope do your ‘networks’ have?
- What would colleagues say about your leadership style and performance?
- What do you do with good ideas?
- How do you manage your own work/life balance?

Possible Interventions

- Appropriate skills, knowledge and attitude development in current role, including those new skills necessary for the new NHS
- Interventions related to de-motivators or ‘de-railers’ (if there is evidence that these will result in improving performance)

- Career counselling
- Action taken for targeted development
- Formalised performance management- the appropriate formal procedure could be applied
- Add in your own local development activity
NL3 – Take action to address issue.

Low level of performance with limited upward potential

Definition
- Low level of performance
- Limited upward potential though this may relate to the desire/aspiration to progress
- Individual will need to address performance and behaviour quickly

Development Considerations
- Current role mismatch
- Identify issues related to poor performance
- Set clear targets for individual with maximum contact
- Ensure individual owns their need to improve performance
- Use informal performance improvement plan
- Use internal formal procedure if appropriate

Bank of Questions
- How would you describe your current performance? (Dependent on answer, manager may need to offer feedback and define under performance).
- What are the reasons for your continued under performance, both personal and professional?
- What support have you sought to address these issues?
- What has worked and what hasn’t worked and why?
- What were the outcomes of support in terms of training and other interventions?
- What are the areas that we need to concentrate on and develop a plan?
- How can your manager support you in these?
- What would your team say your input is to the overall agenda?
- What was your performance like in your last job?
- What helped in your last job and what hindered?
- Are you motivated by your objectives?
- How do you feel you support the overall organisational objectives?
- What barriers do you experience?
- Do you wish to improve and develop?
- On a scale of 1–10, how much do you want to address the issues?

Possible Interventions
- Clearly define the areas of under performance, measured against criteria e.g. technical procedures, Leadership Framework etc
- Develop agreed plan with individual with key actions and timescales for delivery
- Have monitoring process in place for delivery plan
- Manager to give regular feedback on performance
- Quick remedial development activity
- Career counselling
- If no improvement, formalised performance management procedure
- Add in your own local development activity
## FUTURE TALENT RESILIENCE MAP – TO PRESENT TO YOUR TALENT PANEL

<table>
<thead>
<tr>
<th>KEY ROLE</th>
<th>INCUMBENT</th>
<th>EMERGENCY COVER</th>
<th>READY NOW (0 – 1 YEAR)</th>
<th>READY SOON (1 – 3 YEARS)</th>
<th>READY LATER (3 – 5 YEARS)</th>
<th>RISK</th>
<th>COMMENTS</th>
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<td>FA</td>
<td>MI</td>
<td>TL</td>
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<td>AT</td>
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<td>None</td>
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<td>Medium</td>
<td>Action plan needed for ‘Ready Soon’ pipeline</td>
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## EXAMPLE OF POPULATED FUTURE TALENT RESILIENCE MAP

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