

# NHS FINANCE INCLUSIVE TALENT MANAGEMENT STRATEGY AND MODEL

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### INTRODUCTION

- 30+ years NHS (started Band 2 Debtors Clerk)
- Involved in early appraisal implementation
- Strong advocate staff development mentoring/reciprocal mentoring, sponsorship, shadowing, previous vice-chair role National Finance Academy
- Level 3 Warrington and Halton NHSFT
- Currently working in Gibraltar Ministry for Health,
   Care and Business supporting health and care systems



### **OUR TALENT MANAGEMENT JOURNEY TO DATE**

2020 – 2021 One NHS Finance engagement conversation

September 2021 National Finance Academy established

February 2022 Working group established

November 2022 Talent Management workshop

January 2023 Talent Management strategy plan presented to

Finance Leadership Council

January – May 2023 Regional engagement and feedback

May 2023 Final strategy signed off

May – July 2023 Strategy guidance developments, & launch at One

NHS Finance Leadership Summit

July – January 2024 Governance and reporting structure developed for

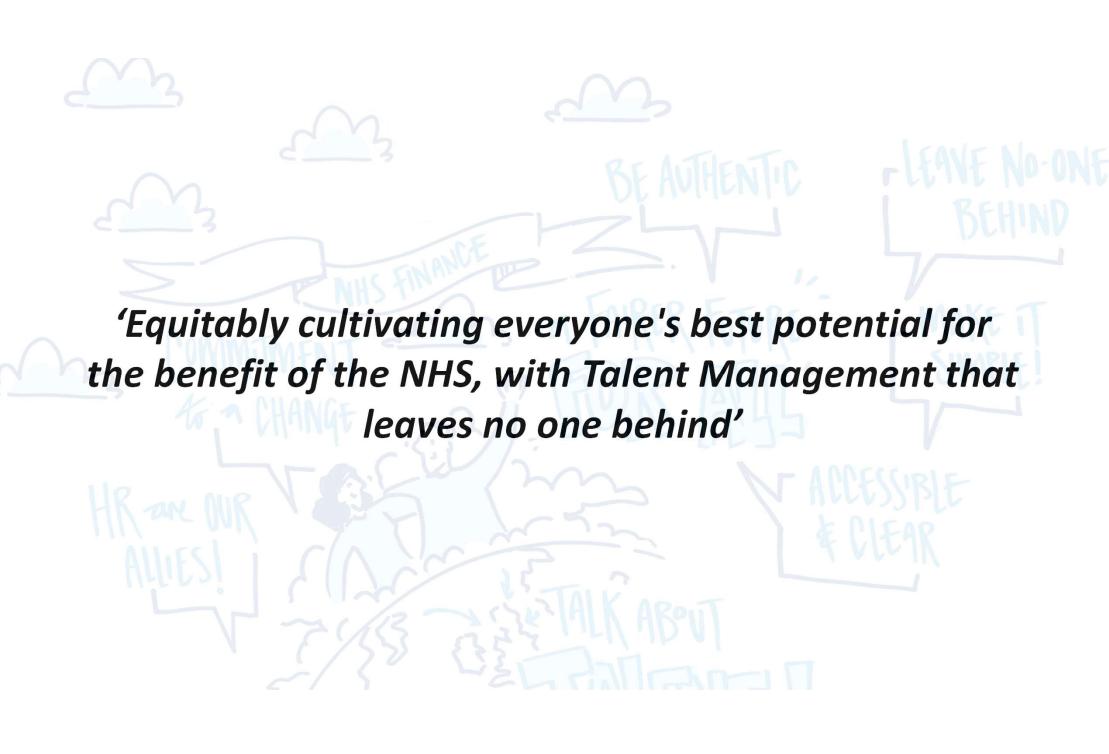
Finance Leadership Council, sign off and roll out

January 2024 – now ONF supporting regions with implementation

through regional board updates. Facilitated

workshops for line managers in Jan, Feb & March.





### TALENT MANAGEMENT MODEL

We are recommending the following approach:

- Grow Individuals in a role with no current desire to move up the banding structure
- Stretch Individuals with a desire to progress with accountancy qualifications and/or up the banding structure
- Accelerate individuals with drive and ambition to reach as high a level as possible, and ambition to reach potential quickly

These 3 groups are then further broken down into:

- New in post
- Core Contributor
- Expert

The guide includes suggestions for development at each level

#### **GROW**

In a role with no current desire to move up the banding structure

#### New in Post

First 18 months of role

#### Core Contributor

Completed more than 50% of the overall competencies of this role

#### Expert

Completed all of the competencies (both technical and behavioural)

#### STRETCH

Desire to progress with accountancy qualifications and/or up the banding structure

#### New in Post

First 18 months of rol

#### Core Contributor

Completed more than 50% of the overall competencies of this role

#### Expert

Completed all of the competencie (both technical and behavioural)

#### **ACCELERATE**

Drive and ambition to reach as high a level as possible, and ambition to reach potential quickly

#### New in Post

First 18 months of role

#### **Core Contributor**

Completed more than 50% of the overall competencies of this role

#### Exper

Completed all of the competencies (both technical and behavioural)

### **KEEPING IT ACCOUNTABLE**

A combined 'top-down and bottom-up' governance process was developed and agreed with the Regional ONF Boards which will co-ordinate reporting, allowing for at least annual progress updates to be provided to the Finance Leadership Council.

This means that annual talent discussions between CFOs and the ICB CFOs about their staff will take place, and then an annual report into the ONF Regional Board (or equivalent).

### Advantages include:

- Regional & national talent and pipeline discussions re all staff and roles
- Support with recruitment and filling current vacancies and high-risk roles
- Discussions should support more opportunities for secondments and movement of staff across systems
- Identification at various levels of organisations and systems that require support to implement the strategy



### **OVERVIEW OF THE TALENT MANAGEMENT PROCESS**

All finance staff to have an annual talent conversation, separate to their appraisal



Organisation CFO has annual Talent Pipeline discussion / review with senior management team



ICB CFO has annual Talent Pipeline discussion with CFOs in system



Regional CFO has annual Talent Pipeline discussion and reports findings into One NHS Finance Regional Board (or equivalent)



Regional Boards report progress made against Talent Management Strategy into National Finance Academy Finance Leadership Group, to be reported onto Finance Leadership Council within an annual strategy update





## TOOLS TO SUPPORT STRATEGY DELIVERY



### Development selfassessment toolkit

Self-assessment against the NHS Finance Competency Framework

This self-assessment toolkit is based on the NHS Finance Commetency Framework which outlines the technical and behavioural skills required at uns sent-assessment tooksit is based on the <u>NUN-annance Competency Framework</u> which outlines the technical and behavioural stalls required at a walk stage of a finance career in the NNS. This tool allows you to sail-assess yourself against each of the competencies to help you identify what wach stage of a mance career in the NHs. This tool allows you to self-assess yourself against each of the competencies to neip you gonthy what areas you need to develop further to become well-experienced across oil areas relevant to your current band level. The self-assessment form can be areas you need to develop rutmer to become well-experienced across all areas relevant to your current band level. The self-assessment form can accessed below where you will be presented with a series of questions that require you to score yourself against each competency from Level 0. accessed below where you will be presented with a series of questions that require you to score yourself against each competency from Leve (none) up to Level 4 (expert). The form should take approximately 20 minutes to complete and on completion you will be presented with a (none) up to Level 4 (expert). The form should take approximately ZU minutes to complete and on completion you will be presented with a summary of your scores including feelback of what competency areas need development and what topics of training and development you should There will also be information on available training and development assessment process to produce an up-to-date result of scores. All of your look to undertake to develop those areas further.

opportunines from uoth notes and stanonal programmes signposted.

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to access / attend).

Encourages, draws attention to, acknowledges and reinforces effective team working and collaboration.

YOU SCORED YOURSELF LEVEL 1 (BASIC)

### Feedback

To further develop your knowledge and experience in this competency, you should look into development opportunities around: Please see below the current opportunities that we have through One NHS Finance and our delivery partners.

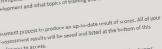
### Resources

### DECISION-MAKING

(10 hours of CPD)







Please note that if you score yourself as Advanced (level 3) or Expert

nere will also be information on available training and development opportunities from both local and national programmes signposted self-assessment results will be saved and listed at the bottom of this

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[evel 4] in a competency, then this will result in no resources / events.



TALENT MANAGEMENT STRATEGY

### **GOVERNANCE**



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individuals regarded on whether things are commonly averaging in results.

Recogniting that the 10% Factor Fundam facts challenges in respect of underrepresented groups at restrict retrieval, the third properties, creating retrieval retrieval and the state of the s

This will be carried out by looking into support programmes such as the ONF Spontanting Programme, mentoring programmes and evidence of the Company of the

### TALENT MANAGEMENT APPROACH



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### 06 - HOW TO HOLD TALENT CONVERSATIONS: AS A LINE MANAGER

In accordance with the NHS Scope for Growth model and NHS Our People Promise, it is essential to recognise the potential in every individual and regard everyone as talent. All individuals within the team, irrespective of technical expertise, as talent. All individuals within the toam, irrespective of technical expertise, band, profession, working arrangements or characteristics should have an annual conversation that focuses on their potential and career, not just their performance, with regular updates throughout the year on progress made.

> "Individuals should be able to bring their whole selves to work and be in the right environment for them to flourish and reach their potential" Leadership Academy



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### STEP 1: PREPARATION

encourage the 15th installed assessing themselves against the NHS Finance Competencies assessing themselves against the NHS Finance Competencies at the rolle / area they wish to aspire to, using the unline curriculum self-assessment toolkit, and bring their results to

From previous appraisals and one-to-ones, aim to yourself with the staff member's career aspiration development goals.

### TALENT MANAGEMENT RESOURCES - QR CODES



Access / download all Talent Management resources on ONF website



To access the online development selfassessment tool

### **NEXT STEPS**

### TALENT MANAGEMENT STRATEGY

- Comms and awareness workshops to promote Talent Management Strategy
  - Facilitated online workshops taken place in January, February, and March 2024
- Link in with Leadership Academy and Scope for Growth training materials for Talent Management
- Tools and resources developed and available to download from ONF website to help line managers with facilitating talent conversations with staff
- Incorporate Talent Management process / expectations into ONF national development programmes

### **GOVERNANCE PROPOSAL**

- Letter from Julian Kelly to all CFOs in January expectations for CFOs re implementation and reporting outlined
- ONF team now supporting each region to implement their local governance process and support with building first reports
- First regional reporting updates to Regional Boards by end of May 2024
- Regional updates then taken to June 2024 National Finance Academy Finance Leadership Group
- Then update to September Finance Leadership Council (2024) from National Finance Academy re initial implementation and progress so far
- Expectations built into all 3 levels of Towards Excellence Accreditation implementation from September 2024



### **NEXT STEPS**

### **PULSE CHECK**

The strategy sets out the expectations for delivering Talent Management for all, the governance process details how progress will be reported, and we want to check-in with the finance community as to whether the strategy is making a difference.

We will carry out an annual survey with our community to gain feedback:

- ✓ Whether they are receiving a dedicated annual Talent Management conversation
- ✓ Do they feel more valued as a result of dedicated time focused on their talent
- ✓ Do they have a clear development plan on which they are more focused
- ✓ Has there been any tangible benefits
- This will provide:
  - Assurance that the strategy is delivering on the original intentions, and
  - confirm whether we have achieved Talent Management in NHS Finance that leaves no-one behind.



### WHAT YOU CAN DO NOW...

- Visit the ONF stand in the exhibition during the breaks to learn more about the talent management process and be shown where to access all the documentation
- Network with colleagues during the conference to learn about current experiences of talent conversations and talent management processes – share the learning!
- Using the guidance and documentation available, start working through the
  process asap. Put in a request with your line manager for a talent management
  conversation, and / or set this up with your staff and ensure you dedicate time to
  this in addition to their appraisals.