



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.





‘Equitably cultivating everyone's best potential for the benefit of the NHS, with Talent Management that leaves no one behind’

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



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



ONE NHS FINANCE

RESOURCES EVENTS NETWORKS PROGRAMMES ACCREDITATION

LOGIN / REGISTER

Development self-assessment toolkit

Self-assessment against the NHS Finance Competency Framework

This self-assessment toolkit is based on the **NHS Finance Competency Framework** which outlines the technical and behavioural skills required at each stage of a finance career in the NHS. This tool allows you to self-assess yourself against each of the competencies to help you identify what areas you need to develop further to become well-experienced across all areas relevant to your current band level. The self-assessment form can be accessed below where you will be presented with a series of questions that require you to score yourself against each competency from Level 0 (none) up to Level 4 (expert). The form should take approximately 20 minutes to complete and on completion you will be presented with a summary of your scores including feedback of what competency areas need development and what topics of training and development you should look to undertake to develop those areas further.

There will also be information on available training and development opportunities for both local and national programmes signposted about your feedback (Please note that not all resources and events are accessible to you).

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

assessment process to produce an up-to-date result of scores. All of your self-assessment results will be saved and listed at the bottom of this page for you to access.

Please note that if you score yourself as **Advanced (level 3)** or **Expert (level 4)** in a competency, then this will result in no resources / events showing for that competency.

Feedback

To further develop your knowledge and experience in this competency, you should look into development opportunities around:

- building and developing a collaborative culture


Please see below the current opportunities that we have through One NHS Finance and our delivery partners.

Resources

DECISION-MAKING

Online e-learning bite-size advanced course from the HFMA (10 hours of CPD)

FIND OUT MORE




NHS FINANCE TALENT MANAGEMENT STRATEGY

GOVERNANCE

The National Talent Management Strategy is led by the National Finance Academy and will be implemented through Regional One NHS Finance Boards (or regional equivalents) with feedback to the National Finance Academy and onwards to FLC.

The workforce will link in with other areas of the One NHS Finance programme, including attracting individuals into a career within NHS Finance which is a part of the PFP workstream.

The strategy will include actions at local, regional and national level, which will be reviewed and updated data resulting from the talent pipeline modelling.

Work will be undertaken to link in with technological solutions to map progress made and to record the data. As the NHS Talent Management Model Scope for Growth is rolled out, this strategy will link to align with the approach, and will work to ensure link into the already established Regional Talent Boards.

Reviews the talent and the organisation engagement results in relation, rather than supported by senior important, giving value will also need time for annual

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The strategy recognises that individuals may move between these groups throughout their career based on their current circumstances, and that regular quality talent conversations are required to ensure that the current position of the individual is understood.

It also recognises that the 3 groups will be inclusive of all roles within the NHS finance structure; accountancy and technician roles, all training routes such as apprenticeships, training roles, supported study, CPD and individuals regardless of whether they are currently studying or not.

Recognising that the NHS Finance function faces challenges in respect of underrepresented groups at senior levels, the strategy also looks to support individuals that may undertake their potential, ensuring that individuals are fully aware of their potential or can identify their ambition in the right section of a Talent Management model.

This will be carried out by linking into support programmes such as the OMF Sponsorship Programme, mentoring programmes and development programmes aimed at individuals with protected characteristics. The strategy will look to include Talent Management requirements within the One NHS Finance Towards Excellence accreditation process and encourage individual Talent Management requirements within the annual objectives of Line Managers and the senior management team.

TALENT MANAGEMENT APPROACH

The strategy aims to develop a framework for Talent Management to be applied at organisation, system and regional level that allow:

- Individuals to have an annual Talent Management conversation to assess where they are, to articulate their aspirations and to work with their Line Manager to agree a programme of development to allow them to progress.
- Chief Finance Officer and their senior management team to discuss the outcomes of these conversations to assess the talent pipeline for their structure, and the development that needs to be supported to result in a continuum of those ready now (0 to 12 months), ready soon (12 to 24 months), and future ready (24 years) to step into roles within the structure.
- Systems and regions to focus on critical roles where the pipeline is particularly challenging and recruitment, and to facilitate cross organisational working.
- Recognition for those that have achieved their aspirations and how they can continue to develop, stay up to date, support others within the system and possibly provide a short term 'caretaking' role as appropriate. How NHS Finance can utilise their expert knowledge and skills within the function in roles such as improvement and innovation of the function is also of importance.

The output of the framework will then be used to map the development needs, to inform regional development PDPIs for individuals, to develop organisational development and training plans, to inform regional development plans and to inform national requirements.

As part of the process, leaders will be able to identify individuals that are happy in their current role, but that there are no opportunities for advancement within the team. Discussion then then take place as to opportunities to expand their role and/or how the individual can be supported to take on more responsibility within the system or a new role, providing them with exposure to other teams, keeping their talent and expertise within NHS Finance.



It will also allow CFOs within the region to identify weak spots, to provide focus on facilitating recruitment or job swaps to deal with those weak spots.

The framework will provide an ongoing process, allowing for post development evaluation and the ability to track the progress of the individual, as the model is updated and refreshed as movements and development occurs. As a minimum, the talent pipeline will be updated by the Senior Management team (overseen by the CFO) every 12 months with individuals receiving at least one conversation per annum in talent management.

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, professional, 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



INDICATORS OF SUCCESS

Success of the Talent Management strategy will be measured through indicators that will include:

- Individuals receive a dedicated annual talent management conversation.
- Every role has a talent management pipeline identified, which is reviewed at least every 12 months by the senior management team.
- Individuals have their own talent management development plan which is reviewed at least annually.
- System leaders are aware of the talent within the system and are clear as to the talent pipeline for critical talent management plan.
- Staff are provided with the opportunities to gain the experience/development required to achieve their improvement in staff survey feedback experience.

STEP 1: PREPARATION

Talent Management is recognised as a two-way process, requiring equal commitment and focus from the manager and individual alike. As a line manager your role is to ensure that there are clear development offers in place and that the individual is supported to take ownership of their development, with a focus on building strengths and working on development areas.

- Prepare yourself with the staff member's role, responsibilities, and performance.
- Review the job description, competencies, and any relevant job descriptions to understand the expected skills and behaviours.
- Encourage the staff member to prepare for the meeting by assessing themselves against the end finance competencies at the role / area they wish to aspire to, using the [online curriculum self-assessment tool](#), and bring their results to the talent meeting.
- From previous approaches and one-to-ones, aim to familiarise yourself with the staff member's career aspirations and development goals.
- Consider any challenges or barriers the staff member may be facing and how you can support them.

Following the talent Principles as set out by the Leadership Academy, you need to ensure that:

- 1) We engage everyone through openness, equality and inclusion.
- 2) We think about future potential as well as current performance.
- 3) We recognise and support talent at all levels.
- 4) We effectively plan for the future.

TALENT MANAGEMENT RESOURCES - QR CODES



Access / download all Talent Management resources on ONF website



To access the online development self-assessment 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.