

**Organisational Development To Meet Tomorrow's Needs**

**Talent Management, Succession Planning and Management Development at Braintree**

Agenda Item 5d

**Portfolio Area:** Efficiency and Resources  
**Report Presented by:** Cllr Michael Lager

**Background Papers:** Organisational Development to meet Tomorrow's needs report to May Cabinet.  
**Options:** Not to support the proposals for talent management, succession planning and management development  
**Risks:** Set out in the report

**Executive Summary**

This report follows on from the Chief Executives report on Organisational Development presented at the May cabinet.

This paper sets out the Council's longer-term and sustainable approach to management capacity and skills issues highlighting the key drivers for a managed and structured programme.

The first part focuses on talent management and succession planning. There is clear identification of what talent management means for Braintree, the proposed methodology, the creation of a 'Talent Book', how this will work and how it will benefit the organization. Talent Book is based around a 9-box grid and this is attached at Appendix 1.

It is proposed that the approach be piloted in Chris Fleetham's Directorate –training to begin in July for all participants.

The second part of this report focuses on Management development, the objectives of a programme and what this will include. Details of the programme and approaches to delivery are covered in a broad outline and outcomes are summarized. A Charter of Excellence for Braintree Managers has been developed which supports the existing corporate competency framework. This is attached at Appendix 2.

The overall outcome of this planned approach is improved skills, greater resilience, enhanced performance, improved customer experience and an organization that is well placed to meet the challenges of the next decade.

**Decision**

1. To agree the proposed approach to talent management, succession planning and management development over the next 2 years.

<b>Corporate Implications</b>			
<b>Financial:</b>	Funding available within existing budgets		
<b>Legal:</b>	N/a		
<b>Equalities &amp; Diversity:</b>	N/a		
<b>Customer Impact:</b>	N/a		
<b>Environment &amp; Climate Change:</b>	N/a		
<b>Consultation/Community Engagement:</b>	Local Committees		Partners
	Public		Staff
<b>Key Decision:</b>	No		
<b>Public/Private Report:</b>	Public		
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## **ORGANISATIONAL DEVELOPMENT TO MEET TOMORROW'S NEEDS**

### **TALENT MANAGEMENT, SUCCESSION PLANNING AND MANAGEMENT DEVELOPMENT AT BRAINTREE**

#### **Introduction**

The Chief Executives report to the May Cabinet set the scene in respect of the need to review the Council's corporate management arrangements in the light of future challenges, external pressures, a changing society and a growing District.

As with any organisation the capacity, skills and the resilience to deliver need to be reviewed to meet the challenges of today and tomorrow. It is essential to ensure a managed process to meet current and future skills and capacity requirements.

This paper sets out Braintree's longer-term and sustainable approach to management capacity and skills issues.

#### **Drivers**

- The Council's commitment to be an outstanding Council (set out in the Corporate Improvement Plan – 'Shaping up for Excellence')
- Ensuring continuous improvement to services and providing excellent value for money
- The changing skills requirements of an organisation aiming to maximise efficiency and value. These new skills sets include a more business-like approach, political acumen, strategic commissioning, programme and project management, managing ambiguity and risk, working in a variety of partnership models and leading through influence. These combined with generic leadership competencies, are likely to be the requirements for the next generation of managers and leaders at Braintree.
- The need for appropriate skills, capacity and leadership to *drive* change whether that be by innovation, efficiency, organisational effectiveness or methods of service delivery - the organisation needs to be alive to new skills and new approaches that are driven forward with vigour
- The need for an organisation flexible in design and capacity able to deliver our ambitions, cope with external pressures and meet future challenges – an organisation that is 'fit for purpose'.

## **TALENT MANAGEMENT AND SUCCESSION PLANNING**

### **What does Talent Management mean?**

“Talent” can be defined as the skills, capacity, potential and expertise of every officer of the Council. We all know that we cannot deliver the services of the Council without highly trained, motivated and competent officers, working in the roles that maximise their skill sets and allow them to achieve their potential.

Organisations simply cannot operate without a sound ‘pipeline’ of talented individuals ready and able to deliver. Some of the reasons for this are:

- A shrinking 25 - 45 demographic pool and an ageing workforce
- Fewer FE colleges training professional disciplines
- A tighter ‘talent pool’ of well-qualified and available professional officers within “hard to fill” professions, with the local authority offering the highest pay and benefits package winning the ‘war for such talent’. (Current economy affects this)
- With the increasing challenges of working in the public sector with tough efficiency targets to achieve and a “getting more with less” mandate, many long serving knowledge-rich professionals are seeking early retirement options taking with them their skills and expertise.

The ambitious change agenda set by central government and embraced locally will not be delivered without a ready supply of competent, well-trained and capable officers, enjoying the ‘best fit’ within their organisations.

Talent management is simply a way of providing a consistent approach to getting the best out of our people. Without any doubt, managing talent and taking a holistic approach to how we manage our most prized resource is now a business imperative and demands strategic attention. Service delivery is heavily dependent on the quality of the human resource available.

### **What does talent management look like for Braintree?**

For the Council to assure organisational effectiveness and build its capacity and resilience to change, it is vital that we take a more integrated and focused approach to harnessing our talent.

A recognised methodology can be used to provide the ‘language’ and the framework within which all managers and staff can have purposeful conversations about their strengths, their career aspirations and what the organisation needs to do to maximise their potential and enhance their personal performance. Creating a ‘talent book’ to capture important information about managers and staff, their strengths and development needs

and long term career aims will help address succession plan issues and offer organisational intelligence that will ensure each individual is fulfilling a role that best suits their capability and 'talent'. This is a feature of any enlightened business – Braintree should not be an exception!

Not all our officers are leaders or even effective managers. This may be from personal preference as well as a historical context where officers were 'promoted' into manager positions as the only way their careers could be progressed within the Authority. This has not always been in the best interests of the individual or the Council. In building our capacity and resilience it is essential that we create the 'best fit' for every officer and develop them to their strengths. This is good for them and good for business!

In shaping a future talent strategy for Braintree there needs to be a twin-track approach – for those aspiring to be future leaders and effective people managers and those striving for technical/functional excellence. Both tracks should be compensated equally, as both contribute to the success and 'value' of the organisation. It is crucial that each individual is recognised and developed to maximise their skills base and rewarded for their value-added contribution to Braintree.

### **Next steps: a proposed methodology**

The methodology described in this paper aims to provide a common language in which a consistent and comprehensive approach to managing our talent can be realised. The creation of a 'talent book' requires a mature, honest appraisal of where individuals fit within the organisation matching their own aspirations and perceptions with those of their line managers.

We have spent considerable time compiling an asset register of our physical assets – but not one of our most prized assets – our people! Neither have we addressed one of our biggest strategic risks – the loss of talent and expertise and our inability to attract, motivate and develop our new and pre-existing 'talent'. The risk to our business of not having a strategic talent management plan in place and a living process does not make sound business sense. Failure to mitigate such risk could have a significant detrimental impact on our future service delivery and corporate performance.

### **Creating a Talent Book**

Talent Book can help both people and the business to consider these questions and perhaps more importantly to provide answers that lead to appropriate development actions.

Talent Book can be used at all levels of the business but the proposal from Braintree is to use it at senior management and service unit manager levels. It is a tool that helps identify and understand individual's current level of performance and consequently identifies development actions with one's

manager to enable full potential to be reached. It complements the existing performance review process.

### **Aim of a Talent Book**

The aim of the Talent Book process is to:

- Position talent management at the heart of the People and business strategy
- Help individuals and their managers to identify and understand current levels of performance in relation to role, potential and development needs
- Help enable individuals to achieve their full potential
- Help individuals (in collaboration with their line managers) with career management
- Offer a more objective assessment of performance and potential
- To enable the creation of Braintree's succession plan – a list of business critical roles and their potential successors. These will be a mixture of senior and leadership roles and roles of a specialist or technical/functional nature. Firstly these roles will have to be recognized, then a successor or successors identified and lastly, a succession plan will be developed to ensure that in a determined time span successors will be capable of performing in that role if required.

It should be noted that leadership talent and succession planning are closely related and overlap considerably, particularly in future leadership roles.

### **How does the Talent Book work?**

Talent Book is based around a nine-box grid, with two axes, assessing both potential and performance (see Appendix 1).

Talent book is not static – it is reviewed every year as part of the performance review process - and individuals' positions will change. Like any tool, the talent book should be used wisely and within the context of it being seen as a framework to assist in managing the 'talent' of the organisation not as a sterile mapping or labeling process that fails to add any lasting value and builds resentment and confusion.

### **What's in it for line managers?**

**Line Manager's will:**

- have a better understanding of having the right person in the right position at the right time.
- be able to plan succession and create a pipeline of talent for their service area and the wider organisation, as a consistent approach to identifying key talent will be in place.

- have staff who are better able to understand where they fit within the team and the organisation and receive more targeted training and development through the Council's management development programme
- have staff who should be more motivated as they will feel more comfortable with the role expectations aligning better with their own personal aspirations.
- be able to hang on to their best people because both parties know where they stand and what they expect from each other. It's a mature understanding based on robust and honest dialogue.

### **What's in it for staff?**

- Business and personal needs will be better aligned hence fostering motivation and a greater sense of personal purpose.
- Individual strengths and areas for development will be identified and more targeted development offered.
- As individuals progress across the grid matrix, a range of special attention measures could be offered to enhance performance even more.
- Opportunities for coaching, mentoring and access to development interventions that may not have been available come onto the individual radar.
- Individuals who aspire to more challenging and potential-developing opportunities are able to benchmark themselves within the framework and strive in their career.

### **Where to start our programme?**

Pilot in Chris Fleetham's directorate – training for all participants to commence in July.

### **Success criteria - Council**

Success criteria are set out in the Council's Corporate Improvement Plan - 'Shaping up for Excellence' – People and Performance:

To ensure that our organisation recruits, manages and develops staff that demonstrate excellent performance and leadership and achieve their own and the Council's overall objectives, resulting in better value and service to the taxpayer.

By 2012 we will have:

- A highly motivated workforce
- A responsive and flexible workforce able to adapt to changing requirements

- Increased ideas and innovation from staff to improve service and provide Value for Money
- A skilled and developed workforce that is prepared for the challenges of tomorrow
- Staff who are clear what needs to be achieved and how they contribute to this
- Good CAA, Direction of Travel, Use of Resources and IIP assessments and reports

### **Success criteria - People**

#### **Front line staff**

- Delivering annually improving services
- High and improving customer service
- Committed to improving our skills and knowledge
- Ambassadors for the Council

#### **Service Unit Managers**

- Improved service performance
- Improved customer service
- Individual services recognised as best in class
- Improved capacity/skill base of staff

#### **Senior Managers and CMB**

- Strong partnership with elected Members
- Delivering complex projects to achieve improved customer service, better services and/or sustainable finances
- Improved local, regional and national reputation
- Improved capacity/skill base of service unit managers

## **MANAGEMENT DEVELOPMENT**

### **Objectives**

- To develop and deliver a flexible programme for managers and leaders designed with a major focus on work-based learning and application, underpinned by theory
- To deliver targeted development that supports organisational talent management and succession planning, thereby improving use of scarce resources
- To develop Braintree's future managers and leaders
- To identify specific areas of knowledge or skills in need of developing and offering support to meet individual needs

## **What will management development at Braintree include?**

The programme will cover:

- Team Supervision Development - aimed at 1<sup>st</sup> line managers or those aspiring to be first line managers.
- Management Development – aimed at existing service unit managers or those wanting to develop their skills as managers.
- Leadership Development – aimed at practicing senior managers or those aspiring to be leaders of the future, who already have significant senior management experience.

The approaches will be through a number of interventions, namely:

1. 'Evolution' a Management and Leadership Development Programme for all Essex Authorities delivered through the Essex HR Strategic Partnership.

The Evolution programme supports the needs of individual authorities by developing their future managers and leaders, and also supports partnership working across all authorities within Essex. It is a flexible programme for managers and leaders designed with a major focus on work-based learning and application, under-pinned by theory and will lead to a nationally recognized management qualification.

These programmes prepare participants at different levels of management by developing specific areas of knowledge or skills, and by offering support to meet individual needs. This programme will lead to ILM (Institute of Leadership & Management) qualifications at levels 3, 5, or 7. Each programme incorporates a number of modules designed to ensure that our managers have the skills and knowledge to succeed in an ever-changing environment. Coaching will be an integral part of this programme at Levels 5 and 7, both in respect of being coached as a participant in the programme and in respect of developing coaches within all participating authorities.

2. Core In house programme
3. Managers Forums
4. Continuous professional development (CPD)
5. 360°Appraisal for Heads of Service

## **How will Management development be delivered through these interventions?**

## **1. Evolution Programme**

The programmes are modularised, blended learning programmes incorporating the following core elements:

- Induction workshops.
- Direct teaching (delivered across the County) by an external provider.
- Joint learning and support from cohort of participants from across the 15 Essex Authorities.
- e-learning and e-resources using the VINE (A shared learning management system i.e. learning pool, for all members of the HR Strategic Partnership and Evolution delegates to utilise).
- Self-directed learning (e.g. research, further reading).
- Completion of assignments.
- Assignments, assessment and examinations leading to a nationally recognised qualification from the Institute of Leadership and Management (ILM).
- Working with fellow participants from authorities within Essex on joint assignments.
- Tutorials.
- Support from Line Manager.

As well as the core elements above, the Evolution managers and leaders programmes will include elements of:

- Coaching
- Mentoring
- Psychometrics (for diagnostic and personal development planning)
- Workshops
- CE Challenges
- Innovation report on topic of use to the participant's own Authority

Participants will form discreet cohorts (of approx 16 in total) who will go through their programme together. Participants in the cohort will be from the similar levels but could be from any discipline or professional background, and will be from a diverse range of Essex Authorities.

The cohort will be expected to work together (e.g. on joint assignments), contribute to discussions and support each other through the programme (e.g. participate in on-line discussions). It is hoped that once the programme has finished, the cohort will continue to work together constructively, benefiting all authorities.

The training provider and the HR Strategic partnership will rigorously evaluate the course. There will also be participant evaluation and quality assurance review.

## **2. Core In House Programme**

A range of supervisory and management development modules, both mandatory and optional, which can be accessed via a number of methods including:

- Self directed learning – using a mixture of resources including e-resources, learning library materials and other tools sign-posted too within the Corporate Learning Framework (housed on BDC's Learning Pool site). These are designed to support the competency framework and there are tools linked to each competency covering all staff levels
- e-learning – using Braintree District Councils Learning Pool
- Blended learning – via a mixture of taught input, e-learning, etc
- Taught Input Delivery – Delivered by internal and external providers
- National Vocational Qualifications (NVQ's)

These core courses will support Braintree's particular management requirements and will be informed both through the annual performance review process via personal development plans and by managers highlighting areas as priorities for learning.

### **3. Managers Forums**

The opportunity for managers to interact, learn together and to share best practice. These events promote innovation and creativity and also provide a platform for key corporate issues to be communicated. These will be via:

- Monthly manager's briefings
- Quarterly manager's network or case study sessions
- Annual conference for senior and service managers.

The annual conference is designed to engage managers in identifying future challenges and planning priorities for the organisation for the coming year.

### **4. CPD (Continuous professional development)**

By providing all managers the opportunity to apply for both PET (Post Entry Training) and ESC (External Short Course) funding. Both of these budgets form part of the Organisational Development and Learning central budget. CPD may also be funded directly via the individual's service budget.

### **6. 360 ° appraisal**

These will be an integral part of senior managers performance review process. They will be carried out in February each year in order to have full analysis available for Performance Review meetings. This will be resourced externally.

### **What will the outcomes be?**

- Improved skills and capacity of the organisation at the appropriate level and a focus on priority areas.
- Clear succession planning in place through a refreshed approach to talent management and management development.
- Improved skills, greater resilience, enhanced performance and the organisation prepared to meet the challenges of the next decade.
- Managers able to demonstrate they meet the requirements of the council's competency framework and fulfil the Charter of Excellence for Braintree Managers. (Appendix 2)
- Participants prepared for the demands of their current (or future) role and learners enabled to achieve their future potential in management or leadership.
- The performance of current and future Braintree managers and leaders raised.
- Council performance raised.
- Our customers served more effectively through better leadership and management.
- Essex partnership learning developed (Evolution)

Other benefits of the Evolution Programme to the participating Authorities include raising the performance of managers, utilizing good practice from across the authorities in the partnership and trained coaches who can be used to improve performance. The partnership approach to Evolution will also mean that the costs of the programmes are lower because of the higher volume, and it will form evidence for the KLoE assessment.

### **Budget in place**

The programme will be delivered within existing budgets for 09/10 and 10/11. There may be a need to bid for further resources for 11/12 and going forward. This will be assessed after review of the first year of the programme.

### **Evolution and Core In-house programme:**

£28,850 over the next two years

PLUS

£10,500 focusing on a Performance Management Training Programme (08/09).

### **Continuous Professional development (CPD):**

£8 000 PET Budget – Subject to applications for the current financial year.

AND

£31 530 External Short Course budget. (This budget is divided across all Council services based on staffing numbers)

**Managers Forums and 360 °appraisal:**

Costs met through in-service provision.

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## Performance/Potential Grid – Definitions (9-Box Grid)



POTENTIAL	High Growth Potential	<p><b>Box 7: ENIGMA – New to Role/Role Mismatch</b></p> <ul style="list-style-type: none"> <li>• Temporary situation (new in the function, is expected to become fully performing within 6 months).</li> <li>• Needs on-the-job coaching due to promotion or new in the business/ company.</li> <li>• Needs a lot of information about culture/ company and/or exposure to industry knowledge.</li> <li>• Fully performed in previous job and is working to expand capabilities to perform in a larger job.</li> </ul>	<p><b>Box 8: GROWTH EMPLOYEE</b></p> <ul style="list-style-type: none"> <li>• Occasionally exceeds expectations.</li> <li>• Comes up with innovative ideas/pushes boundaries/status quo.</li> <li>• Demonstrates some capabilities that are needed at the next level.</li> <li>• Can be viewed as successor of next level position.</li> <li>• Can be a current deputy.</li> <li>• Pipeline for future business leaders and top experts.</li> </ul>	<p><b>Box 9: NEXT GENERATION LEADER</b></p> <ul style="list-style-type: none"> <li>• Constantly needs to be challenged.</li> <li>• Can either move up or go sideways (in a different business) with high probability of success.</li> <li>• Sees the future, has a vision of where to go.</li> <li>• Sets new boundaries.</li> <li>• Shapes the game.</li> <li>• Could/Should move within 6–12 months</li> <li>• Highly driven/impatient for new results.</li> <li>• Raises the expectations for self and others.</li> </ul>
	Growth Potential / Role Expansion	<p><b>Box 4: DILEMMA – Role Dilemma / New to Role</b></p> <ul style="list-style-type: none"> <li>• Mismatch where they are (are good at some things, but large knowledge or performance gaps).</li> <li>• May have competencies that are part of a different job.</li> <li>• Low confidence in development potential.</li> <li>• Should move to a more appropriate job within 6 months.</li> <li>• Needs “corrective” action plan with clear milestones.</li> <li>• Needs to show serious commitment to corrective action plan.</li> </ul>	<p><b>Box 5: CORE EMPLOYEE</b></p> <ul style="list-style-type: none"> <li>• Always performs to general satisfaction.</li> <li>• Keeps up with market changes.</li> <li>• The crucial decision on career path has to be taken, an assessment might be appropriate → potential needs to be clearly assessed.</li> <li>• May need encouragement to exploit potential (coaching, challenging, ...)</li> </ul>	<p><b>Box 6: HIGH IMPACT PERFORMER</b></p> <ul style="list-style-type: none"> <li>• Pipeline for future business leaders and top experts.</li> <li>• Demonstrates some capabilities that are needed at the next level.</li> <li>• Very good representative of the organization in the market place.</li> <li>• Pushes the status quo.</li> <li>• Has both strong technical expert/social skills and continuously performs at the highest levels.</li> <li>• Uses a wide internal and external network to get the job done.</li> </ul>
	No / Limited Growth Potential	<p><b>Box 1: UNDER PERFORMER</b></p> <ul style="list-style-type: none"> <li>• Would not be hired if currently a candidate.</li> <li>• Does not have the right competencies.</li> <li>• Should move out of the job within next 6 months.</li> <li>• May not have the appropriate technical/social skills.</li> <li>• No confidence in development potential.</li> <li>• No promotion potential.</li> <li>• Big gap between what is needed and current performance.</li> <li>• Blocks a developmental opportunity for someone more junior.</li> </ul>	<p><b>Box 2: EFFECTIVE</b></p> <ul style="list-style-type: none"> <li>• Usually performs to general satisfaction.</li> <li>• May find it difficult to keep up with environmental changes (market/complexity).</li> <li>• With the right level of support can become solid and valuable performer.</li> <li>• Not ready to be promoted to a higher level.</li> </ul>	<p><b>Box 3: TRUSTED PROFESSIONAL</b></p> <ul style="list-style-type: none"> <li>• Professional backbone of the organization.</li> <li>• The one that everybody learns from.</li> <li>• Performance is extremely reliable in all aspects.</li> <li>• Will probably stay in their current position or at current level.</li> <li>• Stays up to date with current market and subject matter development.</li> <li>• Important asset to the corporation.</li> </ul>
		New to Role / Does not meet / Partially meets expectations (should not be in this category for more than 6 months)	Meets expectations	Exceeds expectations
PERFORMANCE				



## The Charter of Excellence for Braintree Managers

The Council's corporate improvement programme for 2008-2012, 'Shaping Up For Excellence', sets out the Council's ambition to be a leader in public service, with a reputation for delivering excellence in all services.

The four themes of Shaping up for Excellence, our Core Values, and our competency framework are all key to achieving excellence.

### **Shaping up for Excellence**

- Customer Service
- People & Performance
- Communications & Engagement
- Innovation & Efficiency

### **Core Values**

- Perform well and get things done
- Respect and value customers and staff
- Improve and learn
- Deliver that bit extra, and be
- Efficient and effective

In order to be excellent, we must have excellent people. Our Competency Framework sets out the behaviours we expect from every employee of the Council, including distinct behaviours for managers, which are formally measured within the Performance Review process.

In addition, the Council places the following expectations on managers, and you should strive to exemplify these behaviours in your day to day role as a manager:

- Champion your customers' needs
- Recognise others' commitment to customer care
- Consider your approach to customers – think of them in everything you do
- Deliver what you say you will deliver
- Share your own and others' successes
- Be clear with people about what you expect from them – don't assume anything
- Respect others' contributions
- Work collaboratively and ensure others can rely on you
- Make the right decision – even if it's an unpopular one
- Demand high performance of yourself and peers
- Be accountable for managing your staff
- Learn from mistakes and look for improvements, not blame
- Tackle difficult situations – grasp the nettle
- Be fair and objective in your approach to colleagues and customers
- Build trust
- Lead by example – and be visible
- Be innovative and creative, share resources with colleagues
- Manage finances like they are your own
- Plan and deliver projects on time
- See yourself as a resource – know your limitations and manage these
- Don't be afraid to challenge the status quo
- Be open to new ideas and take calculated risks consistent with Council values
- Look for solutions, not problems