

Contents

Statement of Authenticity	1
Evidence Matrix	2
LO1. Be able to review and evaluate an organisation's approach to talent planning.....	5
1.1 Assess how and to what extent the organisation undertakes workforce and talent planning	5
1.2. Analyse internal and external information relating to the organisation's future people and skills needs and the availability of talent.	6
1.3. Assess the extent in which the current organisational workforce and talent planning activities address potential needs.....	6
LO2. Be able to recommend ways to improve an organisation's approach to talent planning	7
2.1 Make reasoned recommendations for how the organisation can maintain an appropriate number of people with the skills required by the organisation.	7
LO3. Be able to contribute to people resourcing activities	9
3.1 Identify and explain the rationale for a specific resourcing activity within the organisation	9
3.2 Agree roles and responsibilities with other contributors to the activity.....	9
3.3 Identify organisational procedures and legislative requirements which underpin the activity	9
3.4 Plan and prepare for agreed role, ensuring the availability of any materials or resources required	9
3.5 Undertake agreed role in a timely and accurate manner, in line with organisational procedures and legislative requirements	10
3.6 Reflect on the effectiveness of the resourcing activity in meeting required objectives and report back to stakeholders	10
References	12

Statement of Authenticity

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to Resourcing and Talent Planning in the Organisation

Word Count: 3778

Student Name: Ruth Taylor

Student Number: 1906248

CIPD Membership Number: 55478664

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed:

A handwritten signature in black ink that reads "Ruth Taylor". The signature is written in a cursive style with a large 'R' and 'T'.

Date: 21 May 2021

Evidence Matrix

Candidate name: Ruth Taylor				CIPD Membership/registration No. 55478664		
Qualification title: CIPD Diploma in Applied Human Resources				Unique Learner No. (ULN): 1906248		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.1	Notes from meeting with National Talent and Succession Senior Meeting	Ev1		
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.1	National Succession Strategy	Ev2		
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.1	Notes from meeting with Head of People and Learning and Development Practitioner	Ev3		
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.1	Draft copy of HEIW Aspiring Managers Training Programme	Ev4		
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.2	Screen shot of risk register highlighting cyber security as a red risk	Ev5		
5ARTP	Contributing to Resourcing and talent planning in the organisation	1.2	Screen shot of OECD (2021) data demonstrating working age population between 1960 - 2018	Ev6		
5ARTP	Contributing to Resourcing and talent planning in the organisation	2.1	AnonymisedEv13 copy of HEIW leavers data from 2018 highlighting staff who left for promotion. Those remaining in NHS highlighted.	Ev7		

5ARTP	Contributing to Resourcing and talent planning in the organisation	3.2	Retrospective email outlining roles and responsibilities in relation to recruitment activity.	Ev8		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.3	NHS Wales Shared Services Partnership Recruitment KPI document	Ev9		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.4	Retrospective email confirming planning of recruitment activity.	Ev10		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.4	Email sent by me to Welsh Language Team requesting translation of job description	Ev11		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Personal specification for role of Train.Work.Live/International Recruitment Officer	Ev12		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Screen shot of selection of shortlisting scores	Ev13		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Email to recruiting manager including top 7 candidates for approval to progress to interview.	Ev14		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Screen shot of calendar showing interview slots and separate panel discussion space	Ev15		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Email sent to recruiting manager including previous interview questions	Ev16		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Copy of finalised interview questions	Ev17		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Copy of pre-interview scenario test	Ev18		

5ARTP	Contributing to Resourcing and talent planning in the organisation	3.5	Copy of one set of interview notes (my comments highlighted)	Ev19		
5ARTP	Contributing to Resourcing and talent planning in the organisation	3.6	Statement from recruiting manager confirming my contribution was effective and met requirements.	Ev20		
Candidate declaration:						
Signature:					Date:	21 May 2021

Contributing to Resourcing and Talent Planning in the Organisation

LO1. Be able to review and evaluate an organisation's approach to talent planning.

1.1 Assess how and to what extent the organisation undertakes workforce and talent planning.

NHS Wales approach to talent and succession planning

Succession planning is a process which focuses on identifying and growing talent to fill business critical and senior positions in the future (CIPD, 2020). It is usually aimed at more senior posts and helps to identify individuals with the potential to step up into more senior positions when they become vacant. HEIW has a leading role in the education, training, development and shaping of the healthcare workforce in Wales, to ensure high-quality care for the people of Wales (HEIW, 2021a). To support this, it is leading work on establishing and managing succession planning and talent management processes for senior and executive leadership roles across NHS Wales (HEIW, 2021b).

A colleague and I met with Jackie Parsons, National Talent and Succession Senior Manager (Ev1), to understand the All Wales approach to talent and succession planning set out in NHS Wales (2017) National Succession Strategy (Ev2), with the aim to ensure a consistent approach that meets the needs of organisations across NHS Wales, taking into account process differences at a local level in relation to talent management and succession planning. It is a 7-step process across 10 years, aimed at:

- Identifying talent at all levels and embedded into organisational processes including PADR/appraisal/job planning processes.
- Improving staff retention at all levels in NHS Wales
- Ensuring availability of candidates that can deliver against strategic objectives
- Increasing creativity and innovation to solve organisational challenges
- Developing attractive career pathways within NHS Wales, to support recruitment and retention.
- Increasing diversity in senior manager positions
- Decreasing turnover at Chief Executive and Executive levels
- Having at least three shortlisted NHS Wales applicants for every Board level position by 2025.

To support this, work has been undertaken to assess the current senior leader landscape and identify:

- which positions are without “ready now” candidates?
- how many “ready now” successors do we have?
- who are the “ready now” candidates?
- who are the high potential leaders for the short, medium and long term?

The Talent and Succession Planning Team have been developing an Aspiring Directors Programme over the past year, supported by the Kings Fund. Individual NHS Wales organisations were asked to nominate their own talented individuals for the programme, who had the drive and ability to move into executive roles within the next three years. It was clear that organisations were using different approaches to identifying their talent, some using robust processes and others not, highlighting the need for a consistent and fair approach to identifying talent across NHS Wales. Once candidates were identified, a questionnaire was shared with them to collect data on their preferred portfolio. 130 responses were received, which highlighted an even split across workforce and OD, nursing and medicine, but fewer stating they wished to work in digital roles. This is of concern, particularly as the Topol Review (Health Education England, 2019) states that within 20 years, 90% of all NHS jobs will require some form of digital skills. It will therefore be important to expand the pool of available talent

in this area, to drive this portfolio of work forward across Wales to enable NHS organisations to meet their digital objectives of the future.

Palmer (2020) reports that only 1% of senior roles within the public sector are held by black employees and there is a strong need to increase diversity at this level. The questionnaire demonstrated only 4 (3%) candidates from BAME backgrounds. To improve representation across this demographic, plans are in place to commission bespoke positive action programmes, including 6-month reverse coaching and mentoring workshops to increase the number of successors in this category.

The development of a robust talent pipeline into executive roles will ensure that NHS Wales has access to a pool of individuals with the skills, capabilities, values and behaviours to fill senior leader roles when required in the future, which is representative of the communities it serves.

HEIW approach to talent and succession planning

Whilst HEIW is participating in the Aspiring Director's Programme, having identified a number of its own employees, they are also responsible for plans for those lower in the organisational structure. A colleague and I met with Foula Evans, Head of People, and Jeremy Ashdown, Learning and OD Practitioner to understand what HEIW is doing at organisational level to support talent and succession planning (Ev3).

HEIW does not have a formal talent and succession planning process in place for those in roles below senior level and does not identify pools of talent to fill vacant rolls. HEIW is very supportive of developing its staff to meet their maximum potential, which is supported by the Values Based Performance Appraisal and Development policy (HEIW, 2019). However, it is down to employees to identify potential roles and apply following the NHS Wales standard process via application and interview.

There are plans in place to develop an internal Aspiring Manager's Programme, based on compassionate leadership principles (Ev4). This will be a selection of three training programmes aimed at individual, managerial and organisational/systems levels. Whilst this would ensure HEIW has the staff with the necessary skills, values and behaviours required to fill vacant roles, individuals would still need to apply for posts via the NHS Wales recruitment process and be successfully appointed to the role. There are no plans to develop a pool of talent within HEIW to access when such roles arise.

1.2. Analyse internal and external information relating to the organisation's future people and skills needs and the availability of talent.

1.3. Assess the extent in which the current organisational workforce and talent planning activities address potential needs.

With the National Succession Strategy now in place, there are robust processes to address the predicted needs for the future in relation to executive director level roles. Supported by the NHS Wales Graduate programme, there is likely to be a reliable talent pipeline for the future in relation to middle and senior management roles. However, for roles below middle management, there are no formal processes in place. This is likely due to the types of roles available at this level which do not require any specialist skill or knowledge, with a stronger focus on values and transferable skills, i.e. organisation, communication, project management and teamwork, which are readily available.

Both CIPD (2018) and Gibson (2018) recommend using workforce segmentation tools to help identify critical roles. HEIW has not identified its critical roles other than in the area of cyber security, which is the only red rating on the organisation's risk register (Ev5). Cyber security is a significant risk area, supported by Humphreys (2020) who states how it has become more important than ever in light of

the COVID-19 pandemic, with millions of people now working from home, potentially exposing themselves and their organisations to cyber-attacks.

HEIW are also yet to review the age profile of the workforce in detail. This is particularly important as data from OECD (2021) (Ev6) shows how the working age population in the UK is now at similar levels to those seen in 1979, around the time the “baby boomers” entered the workforce, demonstrating how there are significant number of employees reaching retirement age. This is further supported by NHS Wales (2015) Focus on the Age of The NHS Wales Workforce 2015 report, stating how the number of staff aged 50 and over has increased across all staff groups since 2008, accounting for 36% (1 in 3) of the workforce at that time. The overall leaver profile has also changed since 2008, with two definite leaver/retirement peaks in 2007/8 at 60 and 65, but in the period 2015/15, there are now three peaks, with proportionally more leaving from the age 50.

Whilst HEIW has robust plans in place to succession plan for senior roles across NHS Wales, there is a need to explore talent and succession planning at an organisational level, making use of best practice tools such as workforce segmentation to inform robust succession plans for critical roles and workforce analytics to understand the age profile of the workforce. Carrying out these exercises will enhance workforce and talent planning activity across the organisation, ensuring we have the right people, at the right time, with the right skills to achieve our business objectives.

LO2. Be able to recommend ways to improve an organisation’s approach to talent planning

2.1 Make reasoned recommendations for how the organisation can maintain an appropriate number of people with the skills required by the organisation.

1. Identify critical roles within the organisation

HEIW’s workforce is predominately made up of administrative and clerical roles, some of which are classed as specialist roles which require particular skills, knowledge and qualifications. It is recommended that HEIW undertake a workforce segmentation exercise to identify which roles within the organisation are deemed critical to it achieving its business objectives. Professor David Lepak and Scott Snell’s Framework for Human Resource Architecture is recommended by Gibson (2020) to help identify critical roles. This helps to categorise the workforce into four quadrants, specialists, criticals, operators and professionals and scores them against a scale of uniqueness of skills and value to the organisation.

The first area to focus on would be cyber security resource, with this area being highlighted as a significant risk to the organisation. The need to act in this area is further supported by the Open Text (2019) White Paper, which states almost 60% of survey responders stated that the most significant barrier to managing cyber attack incidents was the shortage of staffing and skills. EMSI (2020) reports how cyber security is the 2nd most in demand skill for IT security roles, demonstrating the rising need in this area.

A significant barrier is emerging in relation to cyber security roles in that the public sector is struggling to keep up with the salaries offered in the private sector (Scammell, 2018), making it more challenging to recruit and retain staff in this area. This, alongside EMSI reporting that in the US alone there are only 48 qualified candidates for every 100 cyber security roles, Humphreys (2020) recommends building resource capacity from within. EMSI (2020) recommends employers invest time and money in developing employees to acquire the required cyber security skills. There is only one individual assigned to the area of cyber security in HEIW. Therefore, there is benefit in identifying staff from within with a particular interest in this area and investing time and money to enable them to provide support to this agenda. If an individual/s is not identified, EMSI (2020) recommend engaging with

colleges, universities and education providers at a local level to help identify talent that could potentially fill this gap.

Results from the Beyond Hiring: How companies are reskilling to address talent gaps survey (McKinsey, 2020) reports how data analytics is the business area with the greatest need for upskilling, with almost all respondents to the survey classing this area as a priority for their organisation. HEIW has a data analytics team in place, which supports the data analysis needs of NHS Wales. It is recommended that the skills in this team are assessed to ensure capability is fit for purpose and supports the data analytics and workforce intelligence elements of the annual plan (strategic objective 1.6), with plans for 2021/22 focusing on developing workforce intelligence to improve the quality of workforce planning and modelling across NHS Wales.

2. Identify age profile of workforce

NHS Wales' (2015) report highlights how the NHS Wales workforce is aging, with the greatest number of staff sitting in the 50 – 54 age range at just under 17% of a workforce size of just under 86,000. Over the past year, the workforce in NHS Wales has increased considerably from 94,291 in January 2020 to just under 100,000 in January 2021 (HEIW, 2021d). Aligning these figures with the declining working age population, there are likely to be significantly more employees in the age 50 and over category than ever before. It is therefore important that HEIW begin reviewing the age profile of its current workforce, with a particular focus on those aged 50 and over in light of the leaver profile highlighted by NHS Wales (2015). This will enable HEIW to identify potential retirees and their positions and begin succession planning if deemed appropriate. This would be particularly important for senior roles including the Chief Executive and Director of Finance roles, both roles explicitly stated as being essential in HEIW's standing orders (HEIW, 2019).

3. Develop talent pools for middle management roles

Although HEIW does not currently use talent pools for middle management roles, with the development of the Aspiring Managers Programme, there would be value in implementing a talent pool for this category of staff. Employees identified as being suitable for the talent pool would have the skills, knowledge, values and behaviours required for these posts within HEIW and the organisation would have confidence in their abilities and fit within the organisation. However, to support this, I believe it would be important to develop a fair and consistent approach to identifying staff to participate in the programme. With a more robust and consistent system for identifying talent being required for the Aspiring Director Programme, a similar system could be developed for those lower in the organisational structure. This would ensure a fair and consistent approach to identifying talent which does not rely on manager perception or opinion, but purely on capabilities, drive to succeed and career progression aspirations.

This pool would also support development of staff, particularly with retention rates being significantly low at 7.5% (HEIW, 2021e), considerably lower than the UK average of 15% (Monster, 2021) meaning internal promotion opportunities are limited. Supporting employees to meet their full potential whilst enabling them direct access to internal vacant posts will help ensure the organisation has the skills available for the future and are not lost to other organisations as is occurring at the current time with 12 out of 82 leavers since October 2018 leaving the organisation for promotion (Ev7), only 4 of which choosing to remain in the NHS. Therefore, both HEIW and the NHS are failing to retain these individuals.

The above recommendations can be used to support the A Healthier Wales: Our Workforce Strategy for Health and Social Care's (Social Care Wales and HEIW, 2020) ambition of having a "motivated, engaged and valued Health and Social Care workforce with the capacity, competence and confidence to meet the needs of the people of Wales".

LO3. Be able to contribute to people resourcing activities

3.1 Identify and explain the rationale for a specific resourcing activity within the organisation

In September 2020, the Train.Work.Live marketing campaign was transferred from Welsh Government to HEIW, which is designed to attract and train more GPs, pharmacists, nurses and other health care professionals to Wales (HEIW, 2021f). As part of this transfer, the Train Work Live Strategic lead (HH) was seconded to HEIW to continue this work. However, the admin support associated with the programme did not transfer. Therefore, there was an urgent need to recruit to the team within HEIW. As HH was new to HEIW and was unfamiliar with our recruitment and selection processes, I supported her with this work to ensure the process was followed correctly. I was able to support her in this work having undergone recruitment and selection training and supported other recruitment and selection activities across the organisation.

3.2 Agree roles and responsibilities with other contributors to the activity

I met with HH to discuss the process and how I could offer my support and our roles and responsibilities were agreed (Ev8). We agreed that I would take on the role of vacancy manager, which involves the management of the vacancy on our TRAC recruitment system, ensuring all documentation and information is uploaded to ensure the smooth running of the process as well as the organisation of processes outside of the system, e.g. preparing the scenario, identifying panel members, shortlisting, planning and arranging interviews and sitting on the interview panel. As recruiting manager, HH was responsible for finalising the job description and personal specification, finalising shortlisting, interview questions and scenario, leading the interview panel and providing feedback to candidates.

My responsibilities were allocated due to my significant experience with managing vacancies on the TRAC system and supporting previous interview processes.

3.3 Identify organisational procedures and legislative requirements which underpin the activity

The recruitment process is supported by a list of key performance indicators (KPIs) (Ev9) which outline the responsibilities of the organisation and NWSSP in the recruitment process. These ensure responsibilities are carried out promptly and delays are avoided. I was able to schedule the recruitment plan for the post, ensuring adequate time was available for the key milestones listed.

To support the requirements of the Equality Act 2010 legislation, NHS Wales is part of the Disability Confident Scheme, which supports organisations with the recruitment and retention of great people, regardless of their disability, demonstrating their commitment to equality in the workplace (Disability Confident, 2021). When applying for an NHS job, candidates can declare that they have a disability. However, this information is not known to the employer until after shortlisting has taken place. Candidates who declare a disability and meet all personal specification essential criteria must be put forward for interview. Following completion of shortlisting, no candidates meeting all essential criteria were identified with a disability.

To further support the Act, all personal information relating to protected characteristics are removed from application forms at the time of shortlisting. This information is only made available once shortlisting is complete and candidates have been selected for interview. This reduces the risk of unconscious bias during the shortlisting process.

3.4 Plan and prepare for agreed role, ensuring the availability of any materials or resources required

I met with HH to review the KPI document and plan the process (Ev10). The approval process can take up to 12 working days, although we agreed that I would prompt the HEIW approvers to do this as a

matter of urgency. We therefore agreed that this part of the process should not take more than one week. We agreed that the post would be advertised for 2 weeks to ensure a good number of applications and that I would shortlist the day after closing before finalising with HH. Candidates would then be given at least one week's notice for interview. Interviews would be scheduled over 2 days, ensuring appropriate breaks between interviews.

HH provided me with the job description and personal specification and I arranged translation (Ev11). Applications would be made available to me the day after the closing date for shortlisting.

3.5 Undertake agreed role in a timely and accurate manner, in line with organisational procedures and legislative requirements

With all preliminary TRAC documentation and information uploaded and approval given, I identified a day which I could dedicate to reviewing all applications and carry out robust shortlisting. Resourcing and Talent Planning Survey (CIPD, 2020c) demonstrated the most popular methods for selecting candidates was by review of previous work history/experience and thorough application screening. This is the method used in HEIW, with candidates scored against a personal specification (Ev12). Using this criteria, I was able to fairly and consistently evaluate each application form and generate an overall score for each candidate (Ev13). I set a provisional score target of 30/38 and shared the 7 applications with HH for final approval (Ev14). On review, she agreed that all 7 candidates should be invited to interview.

Shortlisted candidates were invited to attend for interview, which I scheduled using Microsoft Teams, ensuring adequate time between interviews and that all invites were sent as private appointments to ensure confidentiality to all candidates (Ev15). I also scheduled separate panel space, which ensured discussions occurred outside of interview slots.

HEIW uses the popular method of competency and values-based interviews to aid the selection process as well as the lesser used work sample tests (CIPD, 2020c). HEIW has a strong set of values (HEIW, 2018), which underpin all that we do. Therefore, when interviewing, the panel are looking for examples of how their competencies are underpinned by these values. Previous interview questions were shared with HH (Ev16) and she refined these to ensure they met the scope and expectations of the role (Ev17).

Michael Page (2021), describes the use of situational judgment tests to assess candidate suitability, drive and core knowledge. This is a common method used in recruitment and therefore we decided that a workplace scenario assessment would be an appropriate method to use. I developed this to include a number of tasks that the candidate could face in their day to day role and asked that they reflect on how they would approach and prioritise each task incorporating HEIW's values (Ev18).

I attended each interview and took detailed notes to help inform deliberation discussions (Ev19). Panel notes were scrutinised and summarised at the end of the process taking a considerable amount of time, due to the high calibre of candidates, with three appointable candidates identified. Therefore, detailed discussions were had before finally agreeing on one successful candidate. HH contacted each candidate and informed them of the outcome of their interview, offering them feedback if they wished.

3.6 Reflect on the effectiveness of the resourcing activity in meeting required objectives and report back to stakeholders

I played a significant role in this resourcing activity, utilising my previous experience to support HH in her first recruitment activity in HEIW. The process was extremely successful, leading to the

appointment of an excellent candidate with the required skills, knowledge and values for the role. This activity has developed my passion for recruitment, and I have taken steps to further develop in this area. I will shortly be supporting HH in the recruitment of the Programme Manager to her team. This will give me exposure to recruiting to a senior role. I have also requested to attend job matching training, to support the training I have already undertaken on job description writing, to further develop my skills and knowledge in recruitment.

I met with HH to reflect on the process and identify if there was anything we could have done differently. The only significant element we would change in future would be the wording of the interview questions. We agreed that these were too “wordy”, as candidates required clarification and prompting to ensure they were able to answer the questions fully. In future, we will ensure questions are written more succinctly and clearly.

We also reflected on the quality of interview by the 2 internal candidates. Unfortunately, whilst both candidates provided excellent applications and were clearly capable of undertaking the role, their interview technique was poor, and they were unable to demonstrate their abilities effectively at interview. We discussed this in detail and reflected on the impact being an internal candidate and knowing the panel members had on their responses. The recruitment process is developed to be as fair as possible and therefore all candidates were scored against their performance at interview, with prior knowledge of candidate’s ability not considered to ensure fairness to external candidates. This was extremely challenging as HEIW is committed to developing its staff, but we agreed that we made the right decision to recruit from outside the organisation on this occasion, which was fair and in line with process.

Grensing-Pophal (2020) highlights the importance of paving the path for development and, to support this and, HH offered both internal candidates constructive feedback by explaining where their answers fell short and how they could be developed to ensure more robust answers. This advice will help them improve their interview technique, helping them to be successful in future.

We further reflected on what HEIW could do to support internal candidates. HEIW is committed to providing learning and development opportunities to staff to enable them to progress in their careers. We are clearly developing staff to meet the expectations of the roles available, however they do not have the level of competence required at interview to enable them to progress. I discussed this issue with the People Team who confirmed that this training is available to staff, however is not clearly promoted and therefore it was agreed that this would be added to our learning and development intranet pages.

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Scammell, R (2018) *Cybersecurity professional salary increase reflects growing cyber threat*. Available at: <https://www.verdict.co.uk/cybersecurity-professional-salary-increase/> (Accessed: 27 April 2021)



Notes from meeting with Jackie Parsons, National Talent and Succession Senior Manager, HEIW HEIW approach to Talent and Succession Planning

Wednesday 14 April 2021

Present:

Jackie Parsons, National Talent and Succession Senior Manager (JP)

Emma Carrington, Policy Officer (EC)

Ruth Taylor, Careers and Widening Access Advisor (RT)

RT and EC asked to meet with JP to understand the organisation's approach to talent and succession planning as part of their CIPD studies. One of HEIW's strategic objectives is to work with partners to improve collective leadership capacity. The first step in this has been to develop talent and succession plans, which identify the following in relation to tier 3 (assistant director) candidates wanting to move into tier 2 (executive director) positions:

- which positions are without "ready now" candidates?
- how many "ready now" successors do we have?
- who are the "ready now" candidates?
- who are the high potential leaders for the short, medium and long term?

This level has been chosen as these roles are the most challenging to recruit to.

Over the past year, the Talent and Succession Planning Team have been developing an Aspiring Directors Programme, supported by the Kings Fund. Individual Health Boards were asked to identify their own talented individuals who had the drive and ability to move into an executive role within the next three years and nominate them for the programme. This exercise clearly demonstrated that health boards were using different approaches to identifying talent in their organisations, some using robust processes and other not, highlighting the need for change and a consistent approach across NHS Wales. All identified were invited by the Chief Executive of HEIW to join the talent pipeline and were invited to attend Talentbury, A virtual festival of leadership, learning and collaboration, aimed at providing a valuable leadership experience for aspiring clinical and non-clinical executive leaders. This was supported by the development of a success profile and talent management programme involving clinicians, Planning and Workforce and OD Executive directors from across NHS Wales to identify the need for any additional offering.

Initial information only included the name of the candidate, their organisation and role. It did not include details of the portfolio they wished to work in. Therefore, a questionnaire was sent to all attendees of Talentbury with the aim of identifying a pool of candidates to use for deployment and targeting individuals. The questionnaire identified 130 credible individuals who knew what portfolio of work they would like to pursue. This showed an even spread across workforce and OD, nursing and medicine, but fewer stating they wished to pursue a role in digital or governance.

The questionnaire also asked for information across all the Stonewall Equality and Diversity characteristics and identified only 4 candidates who represented the BAME group. There are therefore plans in place to commission a bespoke positive action programme, including reverse

mentoring and coaching and workshops over a six-month period to increase the number of successors in this category.

The questionnaire also identified how ready individuals were to progress in their careers. This included ready now, ready in one to two years and ready in three to five years candidates. There was an equal split across all categories, with those identified as ready now being offered three 1 ½ hour mentoring sessions by a retired CEO over six months. To date, 29 individuals across NHS Wales have been identified and the process will be evaluated once complete.

Moving forward, the process is likely to change to an application process supported by development centres that put candidates through a number of exercises including interviews, group exercises and psychometric testing, the results of which will be assessed against the success profile to identify suitable candidates. It will also identify the differences and transition gap between individuals who are not successful and the steps they need to take to enable them to enter the programme at a later date.

JP explained that whilst HEIW is responsible for implementing a talent and succession plan for tiers 1 – 3 across NHS Wales ensuring it keeps all organisations informed, involved and able to influence, it sits with individual health boards to develop their own programmes that supports those in tier 4 and above. There is currently no standard process in place across health boards, with some using best practice such as the 9 box grid. HEIW will therefore be working with Learning and OD Practitioners to develop a toolkit that health boards can use to identify and develop talent in their organisations, most likely tied in with the annual appraisal process.

NHS WALES
NATIONAL SUCCESSION STRATEGY
2017-2027

1. INTRODUCTION

The NHS Wales National Succession Strategy sets out the ambition to deliver a pipeline of talent of NHS staff at local and national levels, underpinned by a technical solution through ESR.

This strategy is designed to be utilised within local NHS organisations to better support consistent mechanisms for succession planning and inform senior level succession planning across both NHS Wales.

Planning for what is needed now will ensure there is effective capability and capacity in the future. This will support NHS Wales to identify, develop and fully utilise the potential of NHS staff in the delivery of a world-class health service for the people of Wales.

2. DEFINITIONS

For the purpose of this document, and to provide clarity, the following definitions of talent management and succession planning are used.

Talent management is a set of integrated workforce processes designed to attract, develop, motivate and retain productive, engaged employees. The goal of talent management is to create a high performance, sustainable organisation that meets its strategic and operational goals and objectives

(Kings Fund, 2015)

Succession planning is the process of identifying critical positions within each organisation and across NHS Wales and assessing current staff members who might be able to fill these positions.

3. CONTEXT

Talent management and succession planning is good practice in any organisation. The focus across NHS Wales has been triggered by an emerging crisis in the recruitment of senior and executive leaders, and the increasing number of roles held by individuals on an interim basis. This situation creates instability across organisations, impacts on the morale and workload of existing staff and ultimately affects organisations' ability to achieve their objectives.

There is a considerable body of evidence to suggest that a vibrant blend of talent management and succession planning provides an important dual function within an organisation. It lifts individual performance beyond the impact of conventional

programmes of learning and at the same time provides an assurance of quality and capability at the point of recruitment into business critical roles.

In addition to this, the evidence suggests that 'home-grown' talent, when undertaken effectively is one of the distinguishing features of world class top performing organisations.

4. VISION

Our vision for NHS Wales is to refresh our national approach to talent management and succession planning to ensure a future pipeline of outstanding performers across services within NHS Wales.

The implementation of the strategy will deliver a systematic and planned strategic effort across NHS Wales to attract, retain, develop and motivate high-performing staff who meet the short, medium and long-term needs of all organisations. The strategy is based on equity of opportunity, will widen access to support and promote opportunity, resulting in a diverse leadership.

There are a number of elements to this strategy, many of which are already in place or in development in individual NHS organisations across Wales. This strategy has been developed, to ensure a consistent overview approach across NHS Wales that meets the needs of all organisations but takes account of local differences in specific processes related to talent management and succession planning.

Evidence shows that when investment in individuals is valued and demonstrated, organisations see improved outcomes, better financial results and an engaged workforce and adaptable workforce which will ensure public confidence.

5. THE OUTCOME

This strategy is designed to enable talent to be identified and nurtured at an early stage in the careers of those with potential to be senior leaders. In this context an effective succession planning approach implemented across Wales will bring the following benefits;

This will result in

- Talent identified at all levels and embedded into organisational processes including PADR/appraisal/job planning processes.
- Improved staff retention at all levels in NHS Wales
- Availability of candidates that can deliver against strategic objectives
- Increased creativity and innovation to solve organisational challenges
- Attractive career pathways within NHS Wales, to support recruitment and retention in line with the Train.Work.Live campaign
- Increased diversity in senior manager positions
- Lower turnover at Chief Executive and Executive levels

- At least three shortlisted NHS Wales applicants for every Board level position by 2025.

6. THE OUTPUT

The output of this work is to facilitate a managed process in relation to the deployment of people within the local talent pipelines and between NHS Wales organisations and wider public services and private sector.

The potential for route transfers between streams of management eg functional managers into general management and vice versa etc could offer an extra opportunity for job enrichment in what could be a very long career.

Implementation of this strategy will be supported by a framework and toolkit, which will describe how we identify, select, develop, deploy, support and evaluate talent within NHS Wales. In the first instance this will be developed to facilitate Senior Succession Planning, but will also support a mechanism to identify potential talent earlier in the talent pipeline at local levels.

7. THE CASE FOR CHANGE

NHS Wales cannot currently answer key questions related to succession planning:

- Which positions are without 'Ready Now' candidates
- How many 'Ready Now' successors do we have?
- Who are the 'Ready Now' candidates?
- Who are the high potential leaders for the short, medium and long term?

Traditionally, there has been a reliance on individuals taking responsibility for their own development and career progression, with managers developing individuals in the context of current roles, rather than taking an organisational or NHS Wales perspective.

Since reorganisation of NHS Wales in 2009, Health Boards and Trusts have been taking action at local levels to identify effective talent management/succession planning arrangements. Consequently, organisations are at different stages of implementation with most investing in their own leadership programmes at various levels. Some organisations are starting to translate the output of these programmes into a process of identification of talent to address and identify appropriate individuals at various levels.

There are currently national development programmes which could form part of the development platform of a succession planning system, however whilst these elements can be building blocks in the overall approach, these are not sufficient to meet the need. Research on senior leader recruitment suggests that on the job experience is the primary defining quality and individuals should be given the opportunity to learn how to lead when in highly visible roles (Harvard Business Review Sept 2012). In addition, recent research by Anders Erickson from Florida State University and

supported by leadership expert Malcolm Gladwell, suggests that it takes 10,000 hours of quality effortful practice or 10 years of quality experience to become expert in a leadership role.

8. THE APPROACH

There is a considerable body of evidence to suggest that a vibrant blend of talent management and succession planning provides an important dual function within an organisation. It lifts individual performance beyond the impact of conventional programmes of learning and at the same time provides an assurance of quality and capability at the point of recruitment into business critical roles. In addition to this, the evidence suggests that 'home-grown' talent, when undertaken effectively, is one distinguishing feature of world class, top performing organisations.

The National Succession Strategy will be delivered through a managed seven step process. A supporting framework and toolkit will describe the specifics of each of the steps, and how they should be adopted at local and national level to create effective talent management and succession planning processes for NHS Wales and allow transfer between the local and national pathways. The seven steps are as follows;

- Step 1 Identify staffing needs
- Step 2 Create talent pools
- Step 3 Identify succession pool candidates
- Step 4 Develop successor candidates
- Step 5 Utilise national reporting capability
- Step 6 Identify candidates for vacancies from talent pools
- Step 7 Evaluation

This will involve organisations releasing their identified top performers to work across the whole system during a time of increasing challenges within local services.

The implementation of the strategy will be managed in two distinct ways. The process for tier 1 and 2 roles, will be managed nationally, through the National Succession Manager post. All other tiers will be managed in local organisations, through a local approach to detailed succession planning. Staff who are appointed into Tier 3 positions will be included within the nationally managed network for succession to Tier 1 and 2 posts.

This strategy is designed to enable NHS Wales talent and succession approaches to deliver against the following key principles;

- Ensuring future leaders have experience of the whole system;
- Ensuring broader sector experience, especially social care services
- Facilitating hands-on experience, especially social care services as part of a top leader's portfolio;
- Acknowledging the importance of being identified from within organisations and supported, mentored and sponsored to succeed.

9. EVALUATION AND MONITORING

This strategy will be adopted across all organisations, however specific implementation of these principles will be unique to meet the demand of each individual organisation. The performance monitoring will therefore be designed to capture what the organisations are doing rather than how they are doing it.

Organisations will therefore be asked to report on an annual basis as a minimum

- Whether the organisation have a consistent mechanism in place for succession planning.
- At what levels of the organisation the mechanism is actively functioning.
- What outcomes the organisation is anticipating and to what extent these are materialising.
- How many leaders are currently in the process.

10. GOVERNANCE

The Succession Strategy at National Level will be sponsored by the Director General of NHS Wales and the lead Chief Executive for Workforce and Organisational Development. Operational implementation of the national level (tiers 1 and 2) will be managed through the National Succession Manager, who will report to the Director of Workforce and OD lead for this workstream. Ownership at local level for the delivery of this strategy will be through the Executive Director of Workforce and OD in each local organisation.

CONCLUSION

Refreshing our national approach to succession planning is a vital step towards ensuring a future pipeline of outstanding leaders in senior roles across NHS Wales. When investment in individuals is valued and demonstrated, organisations demonstrate improved outcomes, better financial results and an engaged workforce, that is adaptable to shifting conditions with organisations ensuring public confidence in their future.

An implementation framework and supporting toolkit will support NHS Wales in delivering this strategy. This will ensure synergy between the national and local pipelines and to enable a system that creates the cross organisation and cross sector deployment opportunities NHS Wales needs future leaders to have.

Planning for what is needed now will ensure there is effective leadership capability and capacity and will support NHS Wales to identify, develop and fully utilise the potential of our staff as leaders in the delivery of a world-class health service for the citizens of Wales.



Notes from meeting with Foula Evans, Head of People and OD and Jeremy Ashdown, Learning and Development Practitioner, HEIW
HEIW approach to Workforce and Talent Planning

Monday 19th April 2021

Present:

Foula Evans (FE), Head of People and OD
Jeremy Ashdown (JA), Learning and Development Practitioner
Ruth Taylor (RT), Careers & Widening Access Advisor
Emma Carrington (EC), Policy Officer

RT and EC asked to meet with FE and JA to understand the organisation's approach to workforce and talent planning as part of their CIPD studies. Having met with Jackie Parsons last week who is supporting the organisation's objective by working with partners to improve collective leadership capacity, specifically for those in tier 3 (assistant/deputy directors) being capable and competent to move to tier 2 (executive director) positions, this meeting was to gain an understanding of the organisation's approach in relation to those in tiers 4 and below, which are the responsibility of individual organisation's to manage.

Both JA and FE explained that there is no formal process within HEIW to identify talent and it does not identify pools of capable candidates in workforce and talent planning. Whilst it supports the learning and development of employees to reach their maximum potential, it is down to individuals themselves to identify suitable roles for themselves and apply following the NHS standard process via application and interview.

We discussed how potential pools of candidates could be identified, using current processes if HEIW were to use pools of candidates. The only potentially relevant information available is the annual appraisal information, which is subjective and based solely on manager interpretation. To identify pools of candidates would require the People Team to assess every appraisal to identify potential talent, but with the potential for line manager interpretation and commitment to development to be inconsistent across the organisation. Using this method would need further supporting tools to ensure the process was fair and identified all appropriate and capable talent.

There are plans in place to develop an Internal Aspiring Managers programme based on compassionate leadership principles, which would enable aspiring managers to undergo recognised training. Whilst this would ensure there are individuals in the organisation with the necessary skills required to fill these positions, individuals would still need to follow the application process and be successfully appointed through the recruitment process. The organisation would not solely tap into this talent pool and would advertise posts on the NHS Jobs website, ensuring fair competition to those from within and outside the organisation.

We discussed whether any work had been done looking at critical roles. The only role that has currently been identified as critical is in cyber security, which is listed on the risk register. Another area to explore would be data analytics.

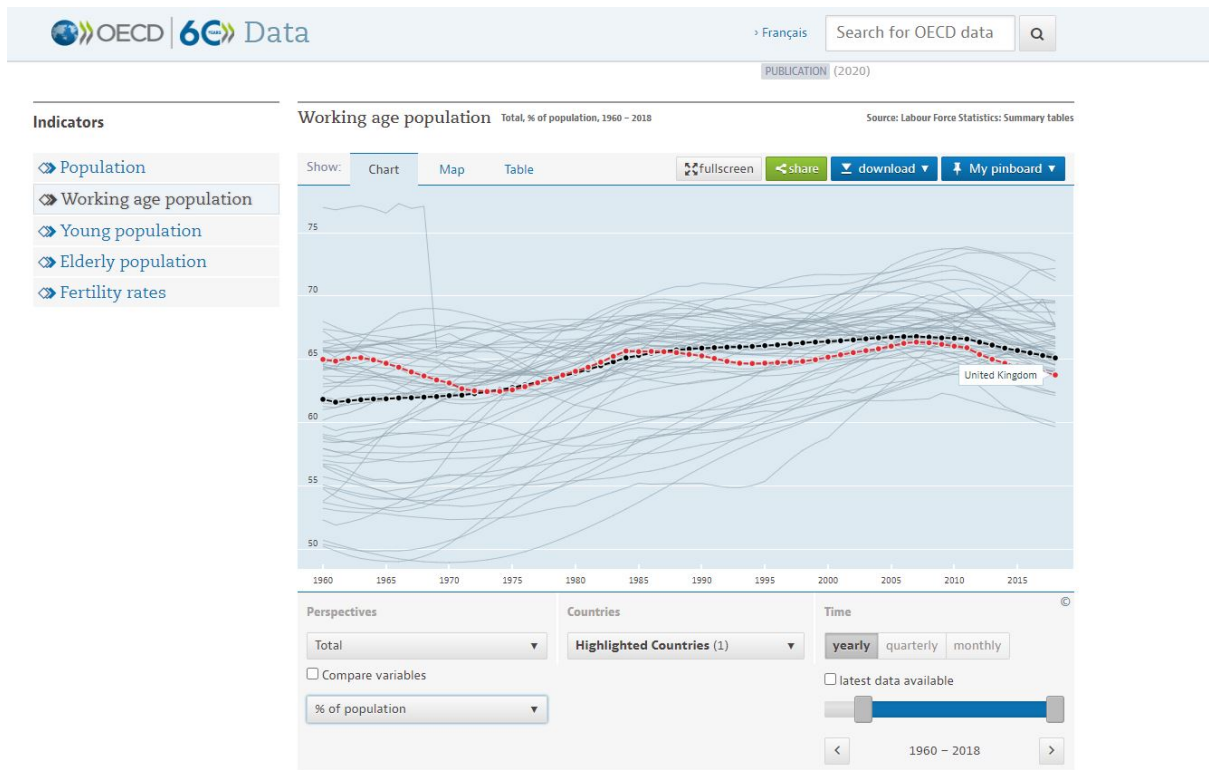
With the work beginning on the Aspiring Directors Programme, FE and JA explained how it was now important that HEIW started to look at their succession plans in relation to tier 2 and 3 roles, to enable us to plan for the future.

Draft Aspiring and Current Managers Programme 04022021(Key: Items in bold are suggested mandatory)

Module:	Compassion Starts with me The Compassionate Self at an individual level	Compassionate Relationships at a team managerial level	Cultures of Compassion at an organisational / systems level
Learning Objectives:	Looking at how we view ourselves, exploring our role, our skills, and our daily interactions	Looking at highly effective team dynamics and team collaboration and methods of intervening to support team effectiveness	Understanding what is key to achieving transformational change at scale and disrupting habits with digital, diagnostic, and dialogic approaches to support this
Aimed at:	<u>All HEIW Staff</u>	<u>All Aspiring and Current Managers</u>	<u>Senior Managers / Heads of Department</u>
Menu / Elements:	• Who am I? • Wellbeing • Digital Literacy • Agile Working • Report Writing • Decision Making • Valuing Diversity • Experience Cube • Inclusivity at work • Reflective practice • Psychological Safety • Stress Management • Emotional Intelligence • Quality Improvement • ESR and Business Intelligence • Equality Impact Assessments	• 360 feedback • Colour Insights • Coaching Triads • Healthy Conflict • Working digitally • Unconscious Bias • Managers Toolkit • Manager as Coach • Matrix Management • Managing Budgets • Quality Improvement • RASCI and Group Dynamics • Healthy Working Relationships • Dialogue, Debate and Discussion • High Performing Teams (Lencioni) • Managing Projects (Agile, Prince II, Verto)	• Forecasting • Procurement • Myers Briggs • Scenario Planning • Workforce Planning • Political Sensitivity • Strategic Thinking • Values and Culture • Appreciative Enquiry • Succession Planning • Mental Health First Aid? • Workforce Strategy 2030 • Managing Remote Teams • Compassionate Leadership • Five Dysfunctions of a Team • IMTP / Annual Plan Objectives
Skills Acquisition	• Self Care • Inclusion • Mindfulness • Emotional Intelligence	• Coaching • Project Management • People Management • Understanding Teams	• Mentoring • Strategy and Planning • High Performing Teams • Compassionate Leadership

HEIW CORPORATE **RISK REGISTER** (MARCH 2021)

te Added	Ref (Risk Area)	Risk Description and Executive Owner	Inherent Risk			Risk Appetite	Mitigating Action	Residual Risk			RAG Status	Progress
			Impact	Probability	Overall Score			Impact	Probability	Overall Score		
		Details of risk If...then... impact...				None Low Moderate High V. High	Summary of action to date or proposed action to reduce risk impact or proximity – this should include a deadline or timetable for completing actions				R/A/G & trend	
8. Apr 2020	1	If HEIW does not ensure that all reasonable steps are taken in respect of cyber security it may be vulnerable to a data breach, possible fines from the Information Commissioner's Office and associated bad publicity. Board Secretary	5	5	25	LOW	This requires the implementation of recommendations highlighted within HEIW's Cyber Security assessment report. This includes the recruitment of a Head of Cyber Security. Cyber Security Implementation Plan to be drafted and implemented	5	4	20		The recommendations within HEIW's Cyber Security assessment report have or are being implemented. The new Head of Cyber Security joined HEIW on 29 June and has commenced working on a new Cyber Security Implementation Plan. Update 04/03/2021 Activities to support the delivery of the cyber security plan are underway. Recent developments: - Access has been granted to the NHS Wales Security Information and Event Management (SIEM) service. - A high-level procurement plan has been submitted to procure a cyber security eLearning and simulation service. - Work is underway to look at additional cyber security resource. - Work is underway to setup the secondary (warm) server to support the Pharmacy website. - The Cyber Incident Response Policy has been redrafted and is ready for Executive review. - Disaster Recovery Plan is currently under review and being redrafted. Other developments: The cyber security internal audit has drawn to a conclusion. A draft copy of the audit report has been distributed for internal review.



Org L3	Position Title	Job Role	Destination On Leaving	NHS Organisation	Leaving Reason
082 Finance and Corporate Services Directorate	Business Partner - Management Accountant	Manager	Unknown		Voluntary Resignation - Promotion
082 Director of Workforce and OD Directorate	Web Support Officer	Officer	Other Public Sector		Voluntary Resignation - Promotion
082 Medical Director Directorate	Data Analyst	Analyst	Other Public Sector		Voluntary Resignation - Promotion
082 Director of Workforce and OD Directorate	Workforce Information Officer	Officer	NHS Organisation	120 Velindre University NHS Trust	Voluntary Resignation - Promotion
082 Medical Director Directorate	Data Analyst	Analyst	Other Public Sector		Voluntary Resignation - Promotion
082 Director of Workforce and OD Directorate	Business Information Systems Support Unit Manager	Manager	Other Public Sector		Voluntary Resignation - Promotion
082 Medical Director Directorate	PSU Caseworker	Officer	Unknown		Voluntary Resignation - Promotion
082 Director of Workforce and OD Directorate	E-Learning Project Manager	Officer	Education /Training		Voluntary Resignation - Promotion
082 Medical Director Directorate	Head of Specialty Training School Pathology (Associate Dean)	Associate Postgraduate	Education Sector		Voluntary Resignation - Promotion
082 Director of Workforce and OD Directorate	Assistant Workforce Planning Manager	Manager	NHS Organisation	339 North Bristol NHS Trust	Voluntary Resignation - Promotion
082 Medical Director Directorate	Business Support Manager	Manager	NHS Organisation	984 Health Education England	Voluntary Resignation - Promotion
082 Director of Nursing Directorate	Senior Business Support Officer	Officer	NHS Organisation	120 Velindre University NHS Trust	Voluntary Resignation - Promotion

From: [Hilary Hopkins \(HEIW\)](#)
To: [Ruth Taylor \(HEIW\)](#)
Subject: RE: TWL/International Recruitment Officer recruitment
Date: 28 April 2021 14:31:34
Attachments: [image001.jpg](#)
[image003.jpg](#)

Hi Ruth,

I am happy to confirm the roles and responsibilities as listed in your e-mail below.

Thank you for all your help and support with the recruitment to this post.

Kind regards,
Hilary

From: Ruth Taylor (HEIW) <Ruth.Taylor@wales.nhs.uk>
Sent: 28 April 2021 10:58
To: Hilary Hopkins (HEIW) <Hilary.Hopkins2@wales.nhs.uk>
Subject: TWL/International Recruitment Officer recruitment

Morning Hilary

I would be grateful if you could confirm the roles and responsibilities for the recruitment to the above post we agreed when we met at the beginning of March.

Hilary

- Finalise JD and advert and share with Ruth
- Agree interview questions and scenario task
- Review top candidates identified from shortlisting
- Agree candidates for interview with Ruth
- Lead interview panel
- Provide outcome and feedback details to candidates

Ruth

- Send JD and advert for translation
- Upload post to TRAC and submit for authorisation
- Identify dates for interviews and a male to support the panel
- Share prior interview questions with Hilary
- Develop pre-interview scenario test and share with Hilary
- Undertake shortlisting and identify top candidates and share applications with Hilary
- Agree candidates for interview with Hilary
- Upload interview details to TRAC
- Send interview invites to candidates once booked in for interview
- Sit on interview panel
- Manage TRAC process for successful and unsuccessful candidates

Many thanks

BW

Ruth

Ruth Taylor (Hi/Ei She/Her)

**Cynghorydd Gyrfaoedd ag Ehangu
Mynediad**

**Addysg a Gwella Iechyd Cymru
(AaGIC)**

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We: aagic.gig.cymru
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Careers & Widening Access Advisor

**Health Education and Improvement Wales
(HEIW)**

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NHS Wales welcomes correspondence in Welsh or English. Corresponding in Welsh will not lead to any delay.

Mae GIG Cymru yn croesawu gohebiaeth yn Gymraeg neu yn Saesneg. Ni fydd gohebu yn Gymraeg yn creu unrhyw oedi.



GENERAL RECRUITMENT PROCESS KEY PERFORMANCE INDICATORS, TARGETS AND RESPONSIBILITIES

(in working days)

Step	Agreed KPI	TARGET & RESPONSIBILITY		Total Time
		NWSSP	HB/Trust/Manager	
Step 1	Time from resignation to submitting vacancy for approval on Trac		5 days	5 days
Step 2	Time to approve/authorise a vacancy		10 days	Maximum of 44 days
Step 3	Time to place adverts live Quality check and place adverts. Internal on Trac only, external onto NHS Jobs and Trac.	2 days		
Step 4	Time to send applications to a manager after the post closes	2 days		
Step 5	Time to shortlist by manager Score against the person specification in the Trac system. Manager completes interview gateway on Trac and Recruitment will set interviews up on the system and invite candidates to interview		3 days	
Step 6	Time to invite candidates to interview	2 days		
Step 7	Time to notify Recruitment of interview outcome Manager to enter interview outcome onto Trac		3 days	Maximum of 27 days
Step 8	Time to send conditional offer letter Recruitment will check original WTE approval so ensure additional approval is already received if required. References will be requested. OH form is sent to candidate to complete and return to OH.	4 days		
Step 9	Completion of pre-employment checks (PECs) Appointee to attend a face-to-face meeting to produce ID, Right to Work, Quals/Reg where applicable, complete DBS check. Internal appointees may have complete records on file, if so, they will only need to complete new OH form. References will be obtained as appropriate. If different quals/DBS level are required then may need to attend a face-to-face meeting	25 days		
Step 10	Time to send unconditional offer letter	2 days		
	Total Time (excluding notice period)			Maximum 76 days
Step 11	Time to notify Recruitment of Start Date		3 days	
Step 12	Time for Recruitment to issue contract	Issued on Start Date		

PLEASE NOTE: All communications by email must be submitted through Trac by entering the Vacancy Communications tab, in relation to your vacancy. Once an applicant has been appointed, use the Applicant Communications tab.

**Alternatively please phone the Recruitment Help Desk
02920 905353**

From: [Hilary Hopkins \(HEIW\)](#)
To: [Ruth Taylor \(HEIW\)](#)
Subject: RE: TWL/Internal Recruitment Officer recruitment process
Date: 11 May 2021 10:14:36

Hi Ruth,

Yes, your paragraph below, succinctly covers everything we agreed, whilst planning the interviews.

I was so glad to have your help and support with the process and really valued your input.

Kind regards
Hilary

From: Ruth Taylor (HEIW) <Ruth.Taylor@wales.nhs.uk>
Sent: 10 May 2021 09:29
To: Hilary Hopkins (HEIW) <Hilary.Hopkins2@wales.nhs.uk>
Subject: TWL/Internal Recruitment Officer recruitment process

Morning Hilary

I am just emailing to confirm our conversations with regard the planning of the above interviews.

We agreed that I would add all documentation and information to TRAC and send for HEIW approval. I agreed that I would prompt the approvers and ask that they approve asap to enable it to go to the TRAC Team for final approval within one week. We agreed that the post would be live for 2 weeks to ensure a good number of applicants. I set time aside to carry out shortlisting the day after advert close and met with you the following day to confirm successful applicants. We agreed that interviews would be held w/c 5 April and would be held over 2 days, to allow at least one week's notice to candidates.

Many thanks

Ruth

Ruth Taylor (Hi/Ei She/Her)

**Cynghorydd Gyrfaedd ag Ehangu
Mynediad**

**Addysg a Gwellfa Iechyd Cymru
(AaGIC)**

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Mae GIG Cymru yn croesawu gohebiaeth yn Gymraeg neu yn Saesneg. Ni fydd gohebu yn Gymraeg yn creu unrhyw oedi.

Ev11

From: [Ruth Taylor \(HEIW\)](#)
To: [Jaci Evans \(HEIW\)](#)
Subject: FW: Band 4 Officer for TWL
Date: 02 March 2021 12:53:00
Attachments: [HEI-2019-0067 - Programme Support Officer TWL .docx](#)

Prynhawn da Jaci

Please could you arrange for the attached JD to be translated?

Diolch

Ruth

Ruth Taylor

**Cynghorydd Gyrfaoedd ag Ehangu
Mynediad**

**Addysg a Gwellu Iechyd Cymru
(AaGIC)**

Careers & Widening Access Advisor

**Health Education and Improvement Wales
(HEIW)**

From: Hilary Hopkins (HEIW) <Hilary.Hopkins2@wales.nhs.uk>
Sent: 02 March 2021 12:53
To: Ruth Taylor (HEIW) <Ruth.Taylor@wales.nhs.uk>
Subject: Band 4 Officer for TWL

Hi Ruth,
Here is the Band 4 JD and PS. Will get the advert over later.

Thanks so very much for your support.

Kind regards Cofion

Hilary

**Hilary Hopkins
Strategic Lead Train.Work.Live.
and International Recruitment**

Health Education and Improvement Wales (HEIW)
Tŷ Dysgu
Cefn Coed
Nantgarw CF15 7QQ

(Ext:
(External: 01443

Email: Hilary.hopkins2@wales.nhs.uk
heiw.nhs.wales

**Hilary Hopkins
Dirprwy Gyfarwyddwr Gweithlu
a Datblygiad Sefydliadol**

Addysg a Gwellu Iechyd Cymru (AaGIC)
Tŷ Dysgu
Cefn Coed
Nantgarw CF15 7QQ

(Est:
(Allanol: 01443

E-bost: Hilary.hopkins2@wales.nhs.uk

PERSON SPECIFICATION

ATTRIBUTES	ESSENTIAL	DESIRABLE	METHOD OF ASSESSMENT
Qualifications and/or Knowledge	• Level 4 Qualification e.g. Diploma, NVQ in business administration, or equivalent experience. • Knowledge of administrative and clerical processes and procedures, along with managerial knowledge, project monitoring and standard office practices • Evidence of recent and relevant continuous professional development.	• Project Management qualification • Understanding of NHS. • Understanding of the governance of NHS and public sector bodies.	Application form and pre-employment checks
Experience	• Sensitive handling of contentious issues/enquiries. • Experience of drafting high quality correspondence on behalf of others and able to produce clear and accurate documents. • Experienced in taking and producing accurate minutes/notes of meetings and actions. • Managing and developing office systems • Handling confidential and sometimes contentious/sensitive information. • Significant skills in utilising Microsoft Office packages. • An understanding of Project Management principles. • Ability to work with people at all levels, internal and external to the organisation. • Evidence of problem-solving skills. • Dealing with multiple demands in short deadlines. • Able to deal with varied situations with tact and diplomacy. • Ability to work in a high pressurised environment and work to deadlines. • Able to develop strong multidisciplinary relationships.	• Experience of working in a large complex organisation, NHS or education preferable. • Knowledge of partnering organisations both public and private sector. • Experience of monitoring financial budgets.	Application form and interview
Aptitude and Abilities	• Comfortable with handling confidential information and	• Ability to speak and write in Welsh	Interview

	handle sensitive matters diplomatically and discreetly. • Ability to build positive, professional, appropriate, proactive and supportive relationships with stakeholders/colleagues. • Professional and focussed. • Conscientious with a high attention to detail, systematic in approach to planning and delivery. • Organised with excellent time management skills • Flexible and responsive to change, comfortable with working in a fast-paced environment. • Personable and supportive. • Advanced IT skills in Microsoft office packages • Organisational skills that ensure timescales and objectives are met • Passion for improvement and takes responsibility to continuously drive service improvement		
Values	• Demonstrates a positive 'can do' attitude and will proactively address problems. • Ability to work as part of a team • Ability to use initiative/judgement to critically analyse, when dealing with and resolving complex enquiries/problems from internal and external bodies, seeking appropriate advice or assistance where appropriate. • Ability to interact in a friendly and professional manner with colleagues and stakeholders. • Ability to act in a confident and professional manner, maintaining confidentiality at all times.		Application Form Interview References
Other			Application form and interview
<u>GENERAL REQUIREMENTS</u> Include those relevant to the post requirements			

- **Values:** All employees of the Health Board are required to demonstrate and embed the Values and Behaviour Statements in order for them to become an integral part of the post holder's working life and to embed the principles into the culture of the organisation.
- **Registered Health Professional:** All employees who are required to register with a professional body, to enable them to practice within their profession, are required to comply with their code of conduct and requirements of their professional registration.
- **Healthcare Support Workers:** Healthcare Support Workers make a valuable and important contribution to the delivery of high quality healthcare. The national Code of Conduct for NHS Wales describes the standards of conduct, behaviour and attitude required of all Healthcare Support Workers employed within NHS Wales. Health Care Support Workers are responsible, and have a duty of care, to ensure their conduct does not fall below the standards detailed in the Code and that no act or omission on their part harms the safety and wellbeing of service users and the public, whilst in their care.
- **Competence:** At no time should the post holder work outside their defined level of competence. If there are concerns regarding this, the post holder should immediately discuss them with their Manager/Supervisor. Employees have a responsibility to inform their Manager/Supervisor if they doubt their own competence to perform a duty.
- **Learning and Development:** All staff must undertake induction/orientation programmes at Corporate and Departmental level and must ensure that any statutory/mandatory training requirements are current and up to date. Where considered appropriate, staff are required to demonstrate evidence of continuing professional development.
- **Performance Appraisal:** We are committed to developing our staff and you are responsible for participating in an Annual Performance Development Review of the post.
- **Health & Safety:** All employees of the organisation have a statutory duty of care for their own personal safety and that of others who may be affected by their acts or omissions. The post holder is required to co-operate with management to enable the organisation to meet its own legal duties and to report any hazardous situations or defective equipment. The post holder must adhere to the organisation's Risk Management, Health and Safety and associate policies.
- **Risk Management:** It is a standard element of the role and responsibility of all staff of the organisation that they fulfil a proactive role towards the management of risk in all of their actions. This entails the risk assessment of all situations, the taking of appropriate actions and reporting of all incidents, near misses and hazards.
- **Welsh Language:** All employees must perform their duties in strict compliance with the requirements of their organization's Welsh Language Scheme and take every opportunity to promote the Welsh language in their dealings with the public.
- **Information Governance:** The post holder must at all times be aware of the importance of maintaining confidentiality and security of information gained during the course of their duties. This will in many cases include access to personal information relating to service users.
- **Data Protection:** The post holder must treat all information, whether corporate, staff or patient information, in a discreet and confidential manner in accordance with the provisions of the General Data Protection Legislation and Organisational Policy. Any breach of such confidentiality is considered a serious disciplinary offence, which is liable to dismissal and / or prosecution under current statutory legislation and the HB or Trust Disciplinary Policy.
- **Records Management:** As an employee of this organisation, the post holder is legally responsible for all records that they gather, create or use as part of their work within the organisation (including patient health, staff health or injury, financial, personal and administrative), whether paper based or on computer. All such records are considered public records and the post holder has a legal duty of confidence to service users (even after an employee has left the organisation). The post holder should

consult their manager if they have any doubt as to the correct management of records with which they work.

- **Equality and Human Rights:** The Public Sector Equality Duty in Wales places a positive duty on the HB/Trust to promote equality for people with protected characteristics, both as an employer and as a provider of public services. There are nine protected characteristics: age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex and sexual orientation. The HB/Trust is committed to ensuring that no job applicant or employee receives less favourable treatment of any of the above grounds. To this end, the organisation has an Equality Policy and it is for each employee to contribute to its success.
- **Dignity at Work:** The organisation condemns all forms of bullying and harassment and is actively seeking to promote a workplace where employees are treated fairly and with dignity and respect. All staff are requested to report any form of bullying and harassment to their Line Manager or to any Director of the organisation. Any inappropriate behaviour inside the workplace will not be tolerated and will be treated as a serious matter under the HB/Trust Disciplinary Policy.
- **DBS Disclosure Check:** The post holder does not require a DBS Disclosure Check.
- **Safeguarding Children and Adults at Risk:** The organisation is committed to safeguarding children and adults at risk. All staff must therefore attend Safeguarding Children & Adult training and be aware of their responsibilities under the All Wales Procedures.
- **Infection Control:** The organisation is committed to meet its obligations to minimise infections. All staff are responsible for protecting and safeguarding patients, service users, visitors and employees against the risk of acquiring healthcare associated infections. This responsibility includes being aware of the content of and consistently observing Health Board/Trust Infection Prevention & Control Policies and Procedures.
- **No Smoking:** To give all patients, visitors and staff the best chance to be healthy, all Health Board/Trust sites, including buildings and grounds, are smoke free.

Flexibility Statement: The duties of the post are outlined in this Job Description and Person Specification and may be changed by mutual agreement from time to time.

From: [Ruth Taylor \(HEIW\)](#)
To: [Hilary Hopkins \(HEIW\)](#)
Subject: Shortlisting
Date: 31 March 2021 08:56:00
Attachments: [082-AC013-0321_2997321.pdf](#)
[image001.jpg](#)
[image003.jpg](#)

Morning Hilary

I have finished the shortlisting and have identified 5 - 7 candidates suitable for interview. All these candidates score 29 or more out of 38 for essential criteria. The candidates below scored 21 or under, so there was a big gap between the good and poor applications.

I've attached the 7 applications for you to review and added my comments and scoring to the top of each one. I would be inclined to have the cut off at 30 and only interview 5, but you may feel we should do all 7 as the scoring is so close and those at the lower end have different skills that can bring different things to the role.

We can discuss and finalise later and I can then set up the interviews.

BW

Ruth

Ruth Taylor

**Cynghorydd Gyrfaoedd ag Ehangu
Mynediad**

**Addysg a Gwella Iechyd Cymru
(AaGIC)**

Ty Dysgu
Cefn Coed
Nantgarw
Cardiff
CF15 7QQ
Ffôn: 01443 846380
We: [@AaGIC_GIG](mailto:aagic.gig.cymru)

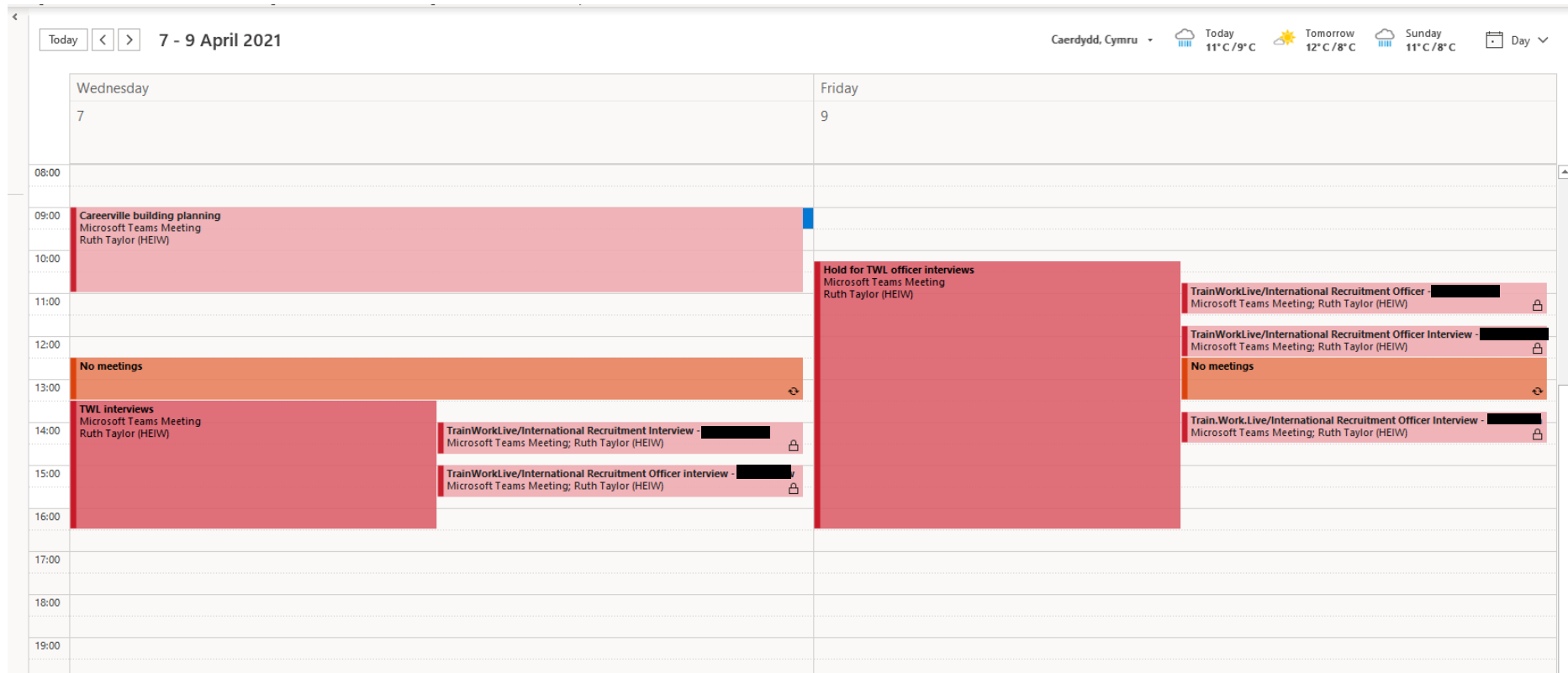
Careers & Widening Access Advisor

**Health Education and Improvement Wales
(HEIW)**

Ty Dysgu
Cefn Coed
Nantgarw
Cardiff
CF15 7QQ
Telephone: 01443 846380
Web: heiw.nhs.wales
[@HEIW_NHS](#)

NHS Wales welcomes correspondence in Welsh or English. Corresponding in Welsh will not lead to any delay.

Mae GIG Cymru yn croesawu gohebiaeth yn Gymraeg neu yn Saesneg. Ni fydd gohebu yn Gymraeg yn creu unrhyw oedi.



From: [Ruth Taylor \(HEIW\)](#)
To: [Hilary Hopkins \(HEIW\)](#)
Subject: Interview questions
Date: 09 March 2021 10:53:00
Attachments: [Pharmacy administrator interview questions.docx](#)
[image001.jpg](#)
[C&WA Officer Interview questions.docx](#)
[C&WA Assistant Interview questions.docx](#)
[Document1.docx](#)
[image002.jpg](#)

Hi Hilary

Here are copies of the interview questions I have used previously, which may be useful and mean we don't have to start from scratch.

BW

Ruth

Ruth Taylor

**Cynghorydd Gyrfaedd ag Ehangu
Mynediad**

**Addysg a Gwellu Iechyd Cymru
(AaGIC)**

Ty Dysgu
Cefn Coed
Nantgarw
Cardiff
CF15 7QQ
Ffôn: 01443 846380
We: aagic.gig.cymru
[@AaGIC_GIG](#)

Careers & Widening Access Advisor

**Health Education and Improvement Wales
(HEIW)**

Ty Dysgu
Cefn Coed
Nantgarw
Cardiff
CF15 7QQ
Telephone: 01443 846380
Web: heiw.nhs.wales
[@HEIW_NHS](#)

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Mae GIG Cymru yn croesawu gohebiaeth yn Gymraeg neu yn Saesneg. Ni fydd gohebu yn Gymraeg yn creu unrhyw oedi.

Post Title:	TWL and International Recruitment Officer			Date:	07/04/2021
Department:	W&OD	Name of candidate:			
QUESTION			COMMENTS		RATING 1 = Poor 5 = Excellent
1.	(H) Scenario response				
2.	(R) Tell us a little about yourself and what attracted you to the role.				
3.	(R) This role is pivotal to supporting the TWL team. Having read the job description, can you tell me what you understand is required of the role and what could you bring if you were successful?				
4.	(R) This role will require you to multitask, supporting events, projects and the wider team, working to tight timescales. Please can you provide an example of how you have multitasked, managed and organised a varied and pressured workload.				
5.	(S) HEIW is a national body and we liaise with all levels across many organisations in Wales and the UK. Can you tell us about a time when you have had to link with multiple stakeholders to organise a meeting or event?				
6.	(S) Due to COVID, many in-person events such as conferences, are being replaced by virtual events. As this is something new for us, how would you approach understanding and using this technology?				
7.	(S) What do you believe are the positives and negatives of a virtual event?				

8.	(H) Part of this role involves updating the content and imagery for our TWL webpages and other resources, such as our brochures. This will require engagement with various specialist teams. Describe how you would manage and organise this?		
9.	(H) You should be aware of HEIW's values and behaviours. Please can you provide an example of how you demonstrate one of these in your non-working life?		
10.	(H) Overview of working arrangements		
11.	(H) Do you have any questions?		

TrainWorkLive and International Recruitment Officer Scenario Assessment

Please read the scenario below and reflect on how you would deal with the tasks in respect of prioritisation and approach, bearing in mind you are new to the role. Consider how you would use HEIW's values and behaviours in your response.

You will be required to provide a verbal 5 to 10-minute summary to the interview panel, explaining how you would prioritise and approach each task.

1. You receive an email in the TrainWorkLive generic inbox from a nurse who is based in India, enquiring about the requirements to work as a nurse in the UK. You are required to respond to this email, with accurate information, within 2 working days.
2. You come into work to an email from the Strategic Programme Lead, asking for your urgent assistance with a piece of work. They have a deadline of close of play that afternoon and require you to format a Board report onto the corporate template. The report will require the use of the new HEIW branding and you are unsure of where to find it and use it correctly.
3. You receive a phone call at 11:30am from a doctor who is an international medical graduate (overseas doctor) who is disappointed that she has not been successful in gaining a place on one of the medical training programmes and would like to understand why they have been unsuccessful.
4. You have been asked to schedule a series of monthly meetings for the remainder of the year, starting from 1 May 2021. Attendees at the meeting include both internal HEIW staff as well as colleagues from Welsh Government.
5. You have been asked to arrange and contribute to the development of a new international recruitment campaign to promote Wales as a great place to train work and live. This will require you to liaise with key teams within HEIW to collate ideas to be discussed at a campaign planning exercise on 10th May 2021.

Post Title:		TWL and International Recruitment Officer		Date:	09/04/2021
Department:	W&OD	Name of candidate:	██████████		
QUESTION			COMMENTS		RATING 1 = Poor 5 = Excellent
1.	(H) Scenario response		Good detailed answer. Would respond to the email ASAP, by acknowledging and providing advice. Noted time difference and need for clear communication with this mind. Next would be the board report. Would inform manager that she had received the email and would do task. Would ask colleagues for advice as to where to find the branding. Would confirm advice with line manager before proceeding, but would make a start if this is not possible (? over cautious). Would speak to someone about task 3 noting the deadline and ascertain the format of the response. Again, recognised the potential time difference. Whist 2 remains her priority, she would communicate with the requester to explain other priority. Would also identify when the requester would like the dates to start. Communication with requester is key. Would split task 5 into 2. First 2 weeks would be used to meet with teams to collect ideas, 2nd 2 weeks used for remaining meetings and collation of ideas. Didn't receive the scenarios until 5 minutes before the interview was due to begin. Broke down their series of actions. First would be the email – advised they would reply as soon as possible, confirming receipt and advising a response would be sent within 48 hrs, and allot a time to respond (demonstrated an awareness of managing expectations). Second would be organising the meetings – advised they would communicate to the originator of the request that they were working on a priority piece of work (dealing with the strategic programme lead), would confirm		4.5

		the desired date and communicate when the event invites would be sent out. Third would be the strategic programme lead – advised they would speak with a colleague first to find out about the branding, then contact lead to acknowledge request and relay what they’d found with help of colleague (confirming what they’d done so far and confirming next steps). Fourth would be the phone call – advised they would take the phone call directly, acknowledge the caller’s request and confirm a response would be issued within 48 hrs; also mentioned they’d confirm how the caller would like to be contacted (demonstrated an awareness of time differences). Fifth would be the TWL campaign – advised they would structure their approach: first would be engaging with stakeholders, then would give themselves 2 weeks to collate info prior to meeting on the 10th. Initially advised they would do the fifth task on the following day, but subsequently amended their response at the end of the set questions. Answered within 5 minutes. All of the above. Only one to acknowledge time difference with international.	
2.	(R)Tell us a little about yourself and what attracted you to the role.	Advised that they’d worked in recruitment for 12+ years. Spoke about how they love helping people progress in their careers, how they love seeing things through from start to finish. Spoke at length about their previous role, and what they enjoyed about their role. Stated they enjoy seeing people thrive, and helping to put the right people in the right positions. Acknowledged that recruitment can have an impact on people’s lives. Also mentioned that they enjoyed meeting with people from different backgrounds and cultures. Didn’t really talk about themselves in a personal capacity, but time ran over to be prompted. 12 years + in recruitment, her passion for role and helping people progress came though, plus seeing things through from start to finish. Spoke about Education Provider role,	4

		where recruited /employed assessors not learners – however, a number of learners, who grew up in care (and the orgn delivered training to these) decided to become assessors – satisfying to see people succeed. Important to enjoy job – watching people thrive knowing someone you recruited has succeeded and thrive. Important job as this is people’s lives. Acknowledged that everyone is different, people’s background and culture. Came across as passionate, in a professional manner.	
3.	(R)This role is pivotal to supporting the TWL team. Having read the job description, can you tell me what you understand is required of the role and what could you bring if you were successful?	Spoke about working internally and externally with Welsh Government, colleges, professional bodies, providers etc. Supporting people coming through external bodies for career support and on-boarding. Seemed a bit unsure about the nature of the roles they’d be supporting, e.g. whether it would be <i>just</i> for nursing etc. Their response suggested they weren’t particularly clear what the role entails – their response was very recruitment-focused. [Following a prompt about what they’d bring to the role] proceeded to talk about how they had years of experience in recruitment, in working with internal and external stakeholders, in events organisation. Spoke about their patience and good communication skills. Described themselves as a “people person” and that they had a passion for helping people. Advised that they had experience of working in healthcare, that they understood NHS recruitment processes, that they had experience of providing career guidance, of advertising roles and marketing. Spoke about working closely internally and externally, plus external providers. Career paths. Asked was it nursing or generic? Knew it was world-wide. Recruitment fairs, Careers Fairs. Felt she has a good understanding that everyone is different, needs are different. Need to be patient particularly with overseas applicants, as per her current job. She described herself as a people person, with a passion for helping. Signpost and advise. Ref experience of advertising and marketing.	3.5

4.	(R)This role will require you to multitask, supporting events, projects and the wider team, working to tight timescales. Please can you provide an example of how you have multitasked, managed and organised a varied and pressured workload.	In previous role, they were one of two that dealt with recruitment in a fast-growing environment (up to 40 live vacancies at any time). Spoke about how they prioritised roles, communicated with managers, worked with colleagues to fulfil business needs, and had regular communication with stakeholders. Advised that they had created a database and that they proactively looked for candidates. Also mentioned that they regularly interacted with colleagues to delegate and take responsibility for actions. Previous role in org which grew from 80 to 400 staff, worked as part of a team; she described having 40 live vacancies of different levels from admin assistant to director; prioritised her day; never afraid to ask questions or for help. Daily meeting to prioritise.	4.5
5.	(S)HEIW is a national body and we liaise with all levels across many organisations in Wales and the UK. Can you tell us about a time when you have had to link with multiple stakeholders to organise a meeting or event?	Provided an example of arranging assessment centres across the UK and the need to engage with various stakeholders, including venues, caterers, managers, candidates, job boards etc. Important to coordinate diaries and travel arrangements and ensure office cover. She would arrange the stands, advertisements and promotion and liaise with care homes and other organisations to encourage their staff to attend. Task requires organisation, team work and co-ordination. Good example. Described providing assessment centres across UK. Liaise with venues, caterers, managers, applicants, jobs boards colleagues, other providers, care homes, UHW – lots of organisations to ensure logistics and respected each others time – have to co-ordinate to make a success.	5
6.	(S)Due to COVID, many in-person events such as conferences, are being replaced by virtual events. As this is something new for us, how would you approach understanding and using this technology?	Has attended a NWSSP virtual awards event. Would identify the platform to be used and arrange practice calls with colleagues, using trial and error. Would contact IT for further assistance and also research and use google to learn about technology. Would try and attend another event to experience the technology in action and bring back any	5

		ideas or learning points. Good answer, but required prompting. NWSSP awards – virtual gave many more people the opportunity to attend. Would find out what platform, arrange a dummy call if it was Zoom or Teams. Professional background or blurred image (no underwear on radiators, which she has seen). Would google and research on how best to display. Find out if there are events internally so can see first-hand.	
7.	(S) What do you believe are the positives and negatives of a virtual event?	Positive – Has enabled businesses to keep going, giving an example of PECs now being done virtually. If this stopped, recruitment would have to stop also. Negative – potential for issues with wifi, cameras, microphones and other technical problems. Virtual is not the same as face to face, with only one person able to speak at once virtually, whereas informal conversation can occur during a in person event. Positives not specifically related to a virtual event. Pos – can keep going PECS etc (people were frustrated, however, she explained it would all be on hold without virtual) Overseas – can speed things up, as avoid travel etc, Negs – internet issues, tech not working.	3.5
8.	(H) Part of this role involves updating the content and imagery for our TWL webpages and other resources, such as our brochures. This will require engagement with various specialist teams. Describe how you would manage and organise this?	Detailed answer. She would identify the frequency that the information required updating, ensure regular communication with stakeholders, recognising that information can change, i.e. branding, contact details etc. Would develop a spreadsheet to record the data. Would meet with relevant teams to ensure information was accurate and was received in a timely manner. Noted that time would be needed for them to carry out their area of responsibility and time for proof reading. Noted that the content may need to be reviewed by multiple stakeholders before finalising. Spoke about diarising the frequency of updates and allocating time to enact those. Mentioned engaging with stakeholders regularly to ensure content and contacts were	5

		up to date. Suggested creating a database and record of when materials and contacts were last updated. Spoke about scheduling meetings with internal and external stakeholders for content, as well as confirming the processes of updating content. Mentioned proof reading, checking drafts with managers and stakeholders before publishing.	
9.	(H) You should be aware of HEIW's values and behaviours. Please can you provide an example of how you demonstrate one of these in your non-working life?	Respect for all – gave an example of her nephew having cerebral palsy and the appreciation this had given her to understanding the barriers of both those with visible and non-visible disabilities. More awareness of the need to adapt communication style. Chose 'respect for all' – spoke about family member who has a disability, and how they've developed an improved understanding and respect for people with visible and invisible disabilities. Spoke about how their personal circumstances had led to a greater respect for people's identities and needs.	4
10.	(H) Overview of working arrangements		
11.	(H) Do you have any questions?	Amended their answer for the scenarios here. Asked about why TWL had moved from Welsh Government to HEIW. Asked about whether the TWL project was designed to be short-term or not. Asked whether HEIW and TWL works with all Health Boards.	
	Comments	Provided good examples in the main, her answers reflected thought into the transferability of skills and experience to date. Some lengthy answers and interview overran. Appointable candidate	39/45

**Statement provided for Ruth Taylor in respect of support for the
TWL/International Recruitment Officer Recruitment Process**

Ruth's support throughout the recruitment process for the TWL/International Recruitment Officer, was effective, efficient, and met all my requirements.

I was not familiar with the process and very much welcomed Ruth's support and professional input. Ruth not only walked me through the process, she provided direct input where this was permissible, such as undertaking an initial sift of applicants using the job description and person specification; Ruth also developed a scenario pre-interview test and provided templates which she had developed e.g. a scoring matrix, plus some sample questions which could potentially be adapted.

This was the first time that I had used Teams to interview and Ruth ensured it was set up such that each interviewee had their own calendar appointment, so that it was all segregated and therefore confidential for each interviewee.

Following the interviews, Ruth and I discussed what had gone well and what could have been improved.

- Some candidates had asked us to repeat seemingly long questions – these were, however, a statement, followed by a question. It may be that we need to re-word these to make them more succinct, or it could be that interviewing via Teams was impacting.
- We felt that internal candidates would benefit from interview training.

Ruth's support was invaluable to me, at a very busy time. I am currently benefitting from Ruth's support, for a senior position in my team.

Hilary Hopkins

May 20th, 2021