



# TOOLKIT FOR SPONSORS OF FINANCE STAFF



This workbook will help you establish your sponsorship relationship, identify what you and your sponsee would like to gain from the relationship, and offer a structure for the relationship.

To ensure that starting a sponsorship relationship is the best option for you at this time we have prepared a self-assessment, please review the statements below and consider your responses.

- I work in a leadership position and have held this position for more than 12 months
- I have a strong network, positive working relationships and a good reputation with senior colleagues in their current organisation
- I have a strong network of senior finance professionals in neighbouring organisations and within my local STP/ICS footprint
- I regularly attend senior meetings and can arrange access to them for my sponsee
- I encourage others to give me feedback throughout my career (an example of this would be partaking in 360-degree feedback)
- I am skilled at giving honest feedback
- I am prepared to make time to meet with my sponsee and prioritise this role as a sponsor, even during challenging periods

## WHAT A SPONSOR DOES

- Goes out on a limb on their sponsee's behalf
- Advocates for their sponsee and supports their next promotion
- Is 'light touch' but 'high impact'
- Connects their sponsee to senior leaders
- Provides their sponsee with access to opportunities that will stretch them and provides the resources they need to succeed
- Gives their sponsee frank, open, constructive feedback on their sponsee's performance
- Gives advice on development opportunities and career progression
- Builds trust and creates time to regularly meet with their sponsee
- Builds a pipeline of diverse talent across the patch
- Understands the benefits of the sponsorship relationship, both for the sponsee and the sponsor

## THE CASE FOR SPONSORSHIP

The Future-Focused Finance Sponsorship Programme is a two-year programme providing career sponsorship for high potential finance staff who are from the groups under-represented at Director level within NHS Finance. This includes females, individuals of Black, Asian, or ethnic minority, individuals with disabilities and individuals that recognise themselves as gay, lesbian, bisexual or transgender (LGBTQ+).

These groups of our workforce are under-represented at a senior level within the finance function and research conducted by the Kings Fund shows that little progress has been made to address this discrimination. Various initiatives have been set up to address this problem, including improving training opportunities and providing people from underrepresented groups with coaching and mentoring opportunities to support them as they develop in their careers.

Now, in addition to these initiatives, we are encouraging our senior people to act as sponsors to help to develop the careers of the underrepresented groups within finance departments.

Research shows that these people are less likely to access sponsorship opportunities (men are 46% more likely than women to have a sponsor and Caucasians are 63% more likely than professionals of colour to have a sponsor).

Therefore, we will be proactively encouraging people to take up sponsorship opportunities as well as encouraging sponsors to come forward. It is crucial to ensure staff from underrepresented groups have access to a sponsor, as sponsorship is open to all staff permitting they fulfill the criteria.

RECENT RESEARCH SUGGESTS THAT  
SENIOR MANAGERS ARE 53% MORE  
LIKELY TO HAVE RECEIVED A  
PROMOTION IN THE LAST TWO  
YEARS IF THEY HAVE A SPONSEE



# WHAT IS SPONSORSHIP

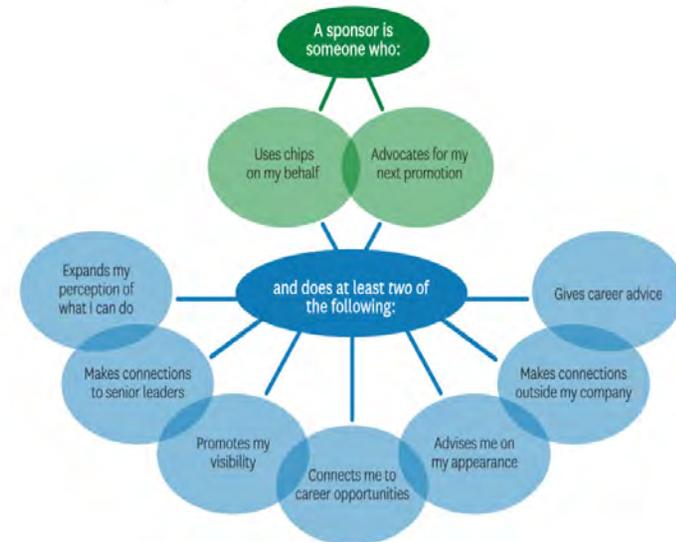
It is important to consider what sponsorship is and how the relationship differs from a mentoring and coaching relationship.

The table below indicates how sponsoring differs to mentoring or coaching and shows the overlaps.

COACH	MENTOR	SPONSOR
<ul style="list-style-type: none"> <li>▪ The seniority of the coach is less relevant</li> <li>▪ The coach may be internal or external</li> <li>▪ The coach provides non-directive challenge through skilfully encouraging self-reflection</li> </ul>	<ul style="list-style-type: none"> <li>▪ The mentor is usually more senior to the mentee</li> <li>▪ The mentor may be internal or external</li> <li>▪ He or she provides direction, guidance, support, advice, feedback and insight</li> <li>▪ They may offer some coaching</li> </ul>	<ul style="list-style-type: none"> <li>▪ Usually more senior to the sponsee</li> <li>▪ He or she will have some influence over the sponsee’s career and will act as a career advocate</li> <li>▪ They will advise on careers and provide development opportunities</li> <li>▪ They will assist with networking</li> <li>▪ They will give directive feedback when required</li> <li>▪ They may mentor and coach</li> </ul>

Whilst sponsors may mentor and coach, many mentors and coaches will not sponsor, because sponsorship requires a higher level of commitment.

In ‘The Sponsor Effect: Breaking Through the Last Glass Ceiling’ by Hewlett, Peraino, Sherbin and Sumberg, sponsors are defined as:



Please note, to sponsor someone it is not a requirement that you are a director – just that you are able to fulfil the role.

## WHAT ARE THE BENEFITS OF SPONSORING SOMEONE?

- Gain a new insight into other roles within your organisation and connect with others
- Get involved in making positive change within

NHS finance by developing the pipeline for future leadership positions

- Develop a loyal group of people who can support you in your own career ambitions
- Engage with reverse mentoring by learning from your sponsee
- Improve your ability to attract and retain talented staff
- Develops a loyal group of people who can support you in your own career ambitions.
- Provides you with an opportunity for reverse mentoring, allowing you to meet with those with alternative perspectives and skills

White, male leaders who act as sponsors are 11% more likely to be satisfied with their own rate of advancement than leaders who don't sponsor.

Leaders of colour who sponsor, are 24% more likely to be satisfied with their own career progress.

Senior managers are 53% more likely to have received a promotion in the last two years if they have a sponsee.

## WHAT ARE THE ROLES OF SPONSOR AND SPONSEE?

The Kerr report in 2018 said that the environment for leaders in the NHS can be hostile. Some people from under-represented groups (women, BAME etc), may well be suffering from working in this hostile environment and from experiencing the unconscious bias of their colleagues. That is one of the reasons why sponsorship is needed.

The roles of both sponsor and sponsee are defined below.

### SPONSOR

- Goes out on a limb on behalf of their sponsee
- Advocates for their sponsee's next promotion
- Connects their sponsee to other senior leaders and promotes their visibility
- Protects and supports their sponsee
- Provides access for their sponsee to development opportunities
- Acts as a critical friend giving frank and honest feedback on performance and executive presence
- Is willing to meet regularly
- Makes it their business to see their sponsee succeed.

### SPONSEE

- Delivers what is required and more
- Is trustworthy, loyal and discreet and can be counted on
- Says 'yes' to work and to new opportunities
- Protects and enhances the personal brand of their sponsor
- May bring something which the sponsor finds useful e.g. a different perspective or a valued skill.

## HOW DO I SELECT A SUITABLE SPONSEE?

When selecting your sponsee consider the following:

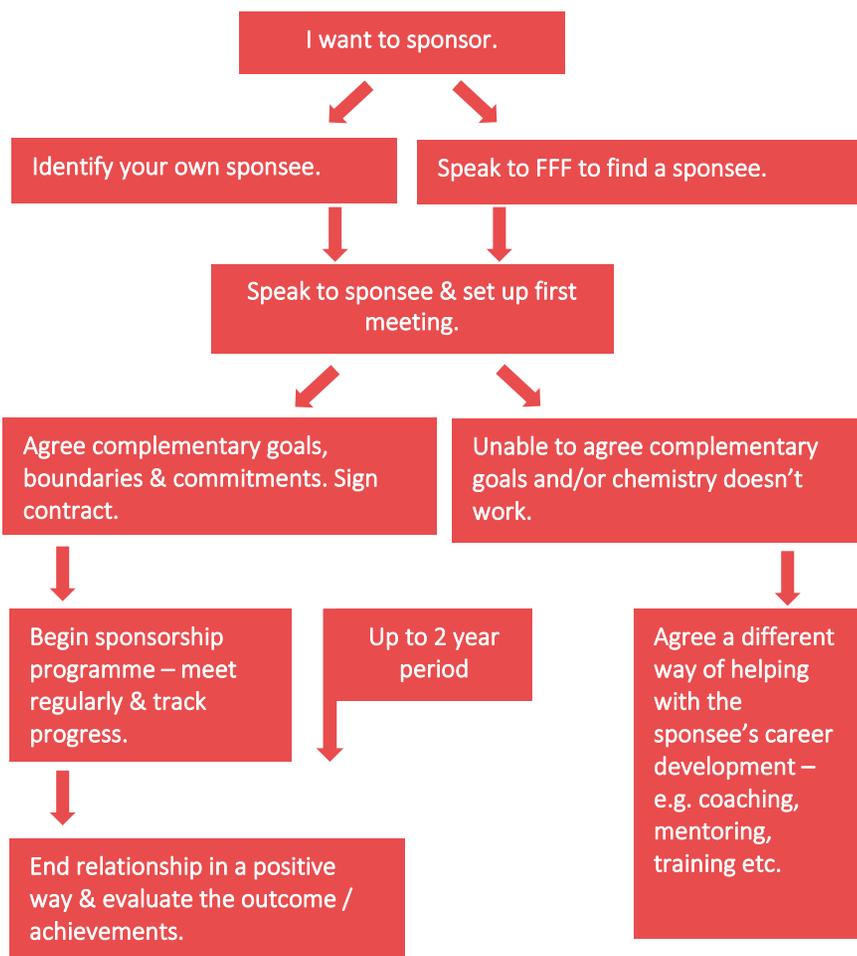
- Do their values align with yours?
- Are they ambitious to progress their career and are they likely to be eligible and able for a promotion within the next three years, even if currently they lack confidence?
- Are they enthusiastic about their work and their career?
- Do they want to be sponsored by you?
- Are they willing to say 'yes' and welcome opportunities outside of their comfort zone?
- Are they highly performing and dedicated to the organisation?
- Do they have emotional intelligence?
- Are they able to reflect on their own performance and identify where they need to change and develop?
- Do they act with honesty and integrity?

Evidence suggests that you will obtain a greater benefit by sponsoring someone who brings you something novel, valued or new – either in their experience, gender, ethnicity, age, background or personal style.

## HOW DO I SET UP THE RELATIONSHIP?

As with any new relationship, it is important that you set it up in the right way. You will find a checklist of things to cover in your first meeting below:

- Spend time getting to know your sponsee including sharing your own background and career aspirations, what you can bring to the relationship and why you wanted to become a sponsor. You may find it useful to share your outcomes of any psychometric questionnaires you have completed – e.g. Myers Briggs, Insights or Learning Styles. Spend some time working out what you can offer to each other.
- Agree boundaries and ground rules for the relationship, including the frequency and format of your meetings – your sponsee should steer your meetings
- Identify your sponsee's objectives and goals and discuss what they would like to gain from your relationship – encourage them to come up with these themselves
- Undertake a skills review and identify where your sponsee needs to grow and develop
- Discuss what could go wrong, how you might recognise early signs and what you will do if this happens



## WHAT TO DO IN YOUR SPONSORSHIP RELATIONSHIP

The goals that each of you has set will determine how your sponsoring works and what your relationship entails.

There is no set pattern to sponsoring – some pairs will meet regularly and most of the work will take place in those meetings, whilst other sponsors will provide opportunities for their sponsee to shadow either themselves or other senior executives. Some sponsors may also choose to shadow their sponsee so that they can observe and give them feedback.

You may well find yourself in conversations about careers (see Appendices 4 and 5) or about networking (see Appendix 7) or coaching someone about their limiting beliefs (see Appendices 8 and 9).

It is important that you keep a regular check on your objectives to ensure that you are both benefiting from the relationship as it develops over time.

There is no fixed term for a sponsorship relationship although typically, you will sponsor someone for up to 2 years.

### Possible Activities

- ✓ Regular meetings - initially to build trust and support, later to work on specific issues, to provide coaching and mentoring, to act as a sounding board and to check on progress
- ✓ Undertake skills and PDP reviews
- ✓ Provide access to your peer group e.g. by attending board meetings together
- ✓ Provide opportunities for your sponsee to shadow yourself and other senior execs
- ✓ Observe your sponsee in action and provide them with focused feedback
- ✓ Undertake reverse mentoring: learn from your sponsee
- ✓ Complete development opportunities – projects, challenging/stretch tasks etc. within finance and/or in other parts of the organisation

## WHAT CAN GO WRONG?

There is of course a level of risk associated with taking a chance on another individual; if things go wrong, your own reputation could take a hit. It is important that sponsees continue to earn their right to be sponsored by demonstrating their loyalty, competence and continuing professional development.

In a recent CTI survey, the most common reason why a sponsorship relationship ended was disloyalty – at 73%. You might also find that an individual fails to perform well, lacks commitment, or decides, having reflected carefully, that they no longer want to be promoted.

## HOW DO I END THE RELATIONSHIP AND EVALUATE ITS SUCCESS?

It is important to end the relationship in a constructive manner by identifying when the objectives have been achieved and when it is appropriate to come to a planned end.

Signs that you may be ready to end are:

- Your sponsee has achieved a major career goal e.g. a promotion
- Your sponsee has achieved other goals they set at the start
- Your sponsee has grown in confidence and is now more self-reliant and independent
- You feel that you have helped as much as you can and have little more to offer
- You feel that you have benefited all that you can from the relationship

It is important to begin to signal the ending ahead of time so that it does not come as a shock to your sponsee and so that it can be ended in a positive and constructive way. You may wish to agree the ongoing parameters for your relationship; for example, will you check-in once every six months or on a more ad-hoc, informal basis?

## EVALUATING SUCCESS

Once you have closed the sponsoring relationship, you should formally evaluate what has happened in order to provide robust evidence about its success. Was it worth the investment of time? Did you both achieve your goals?

Both quantitative and qualitative data can be collected, and we recommend that you collect data at the start and at the end of the programme for the purpose of comparison.

The approach to evaluation does not need to be complex, however, you should be able to demonstrate that the time and investment was well spent. An example evaluation questionnaire for checking progress as you go, is included in Appendix 10.



## APPENDIX 1: AN EXAMPLE CONTRACT

Your agreed purpose and goals for the Sponsoring Programme

Sponsee:

Sponsor:

Your agreed ground rules *(NB: consider commitment, disclosure, confidentiality, protection of reputation as well as honesty, integrity and respectful behaviour).*

How the sponsoring will work:

Where we will meet:

How often we'll meet and for how long:

Signature Sponsor:

Signature Sponsee

## APPENDIX 2: POSSIBLE SPONSEE BARRIERS TO CAREER DEVELOPMENT

When you are sponsoring staff, you may find that they experience crises of confidence. Staff from minority or under-represented groups may be particularly susceptible to this. Here are a few issues which you may come across - and what to do about them if you do.

**Imposter syndrome** - This is a psychological pattern in which an individual doubts their accomplishments (despite evidence to the contrary) and has a persistent internalised fear of being exposed as a "fraud". Individuals with impostorism incorrectly attribute their success to luck, or as a result of deceiving others into thinking they are more intelligent than they perceive themselves to be. If you come across this in your sponsee, it is helpful to go into coaching mode to explore the underlying causes. You will find more about this in Appendix 9.

**Limiting beliefs** - Many of us have limiting beliefs about ourselves and our abilities. The problem with limiting beliefs is that they force people to live below their potential. As a sponsor you need to be able to recognise a limiting belief (often starting with 'I can't...') and work with your sponsee to challenge it. One technique for challenging limiting beliefs can be found in Appendix 8.

**Lack of confidence** – Many people suffer from a lack of confidence which can be general or specific i.e. 'I'm no good with boards' or 'confident consultants unnerve me'. Once again, your job is to spot this as an issue when it arises and to ask questions to understand the underlying causes. A coaching approach, using the GROW model will often work well in these discussions (see Appendix 9).

## APPENDIX 3: ASSESSMENT OF PERSONAL READINESS TO HOLD A SPONSORING MEETING

It is important to be sure that you are in the right psychological space as you go into a meeting with your sponsee. Spending five minutes preparing yourself for the meeting can make a huge difference to both of you.

Sometimes people like to meditate for a minute or so before they meet up with their sponsee. You can do this on the way to the meeting by being mindful for a moment, focusing on your breathing and/or whatever will help you to relax and help you to be in a place where you are ready to give your sponsee your full attention. Here are some statements which it can be helpful to reflect on before you go in:

- There is a shared understanding in place about what we both wish to achieve. There are no hidden agendas.
- My intention is to give this person my complete energy and support in order to help them to develop.
- I am here to help my sponsee to understand how to perform at a higher level.
- I am free of my own stresses and strains for this meeting and can give my sponsee my full attention and listen whole-heartedly.
- I have examined my internal judgements and to the best of my knowledge, I do not have any unconscious bias which will prevent me from being a supportive sponsor who challenges their sponsee from a place of honesty and absolute good will.

## APPENDIX 4: IDENTIFYING CAREER GOALS

Your sponsee may need some help in deciding where they wish to focus their career and therefore what they wish to achieve from the sponsoring programme.

A good place to start with this is to consider the various aspects of their career and which matter most to them. One technique which can help people to think about their career in more detail is the 'Career Wheel' exercise (opposite). It is simple to use and results in a visual representation of how they feel about their careers at the moment. This can then be used as an action planning tool.

Firstly, ask your sponsee to draw an arc across each piece of pie to demonstrate how happy they are with that particular area at the moment. An arc along the circumference means that they are entirely happy with that topic. An arc near to the centre of the piece of pie means that they are unhappy. An arc mid-way means that there is plenty of room for improvement.

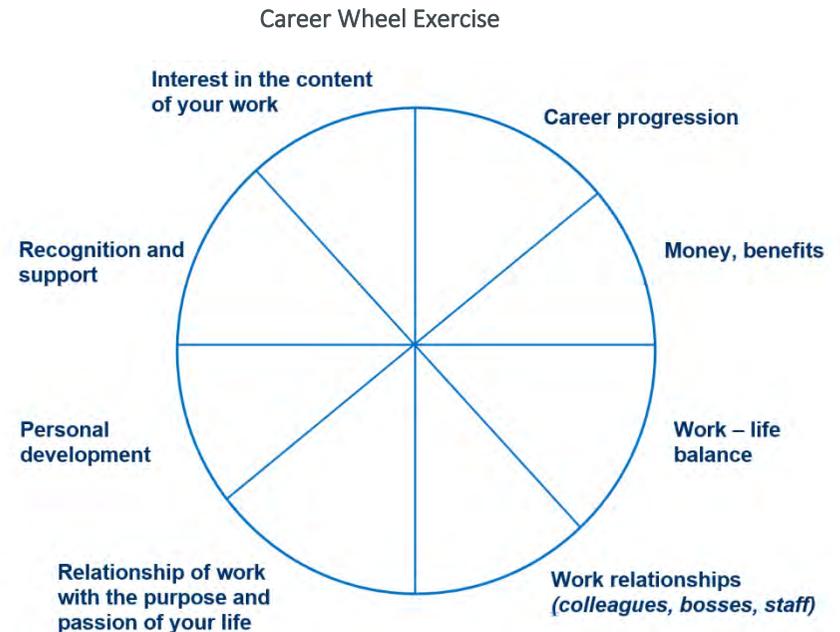
Once they have completed their arcs for each piece of pie, you can use the resulting picture to help your sponsee to focus in on which aspect(s) of their work and/or career they would like to improve *right now*.

You can then focus the conversation on the goals they wish to set for each area. This can lead into a discussion about the actions they wish to take to begin to work towards their desired outcomes.

The wheel can be re-visited at regular intervals to measure progress.

Items to note:

- Just because your sponsee has rated an area as 'low' doesn't necessarily mean that they want to focus on it, as it may not be particularly important to them right now.
- The labelling of the pieces of pie can of course be changed to reflect issues which are more relevant to your sponsee.



## APPENDIX 5: A FRAMEWORK FOR CAREER CONVERSATIONS

If people are uncertain about how or where to progress their careers, the following framework gives you a structure and a series of key questions which will help you to coach your sponsee through to writing a career development plan.



### Life purpose

- What do you naturally do well?
- What have been your greatest successes to date at work?
- What would you do if you weren't a ...?
- Imagine you are writing your own epitaph for your work; what do you want to be remembered for?

### Values and Interests

- What does your work need to give you for you to be happy?
- What matters to you most at work? What drives you at work?
- What do you need at work in order to enjoy it?
- When have you been most happy and unhappy at work? What was the difference between the two?
- When are you 'in flow' and loving what you are doing?

### Experience, knowledge and skills

- What skills do you currently have?
- What experience and knowledge do you have?
- What experience or skills give you your 'USP'?
- What are your greatest career achievements to date?

### Ideal job, targets and aspirations

- My ideal job titles are...?
- My ideal job environment is...?
- Describe your perfect job.

### Career development plan

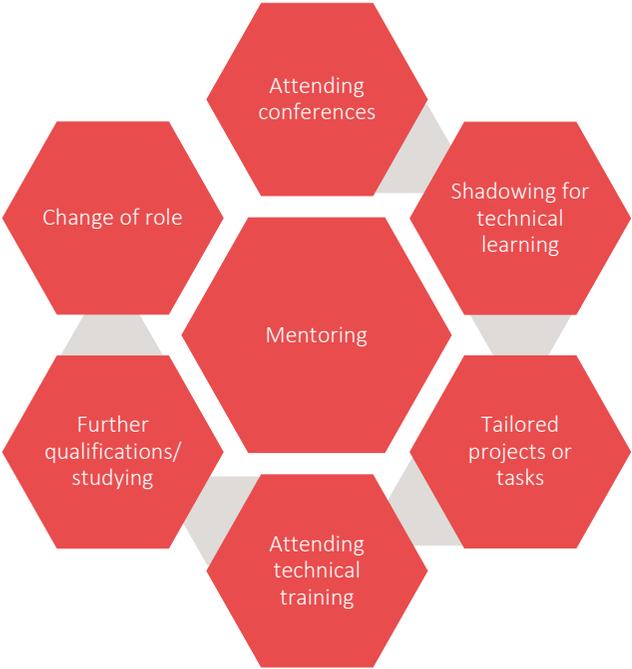
- What do I need to do to develop for my perfect job?
- What actions will I take?
- What is my target date for those actions?
- What support/resources do I need and from whom?
- What might stop me and how will I deal with that?

# APPENDIX 6: WAYS TO DEVELOP A SPONSEE

## DEVELOPING LEADERSHIP AND PERSONAL SKILLS



## DEVELOPING TECHNICAL SKILLS



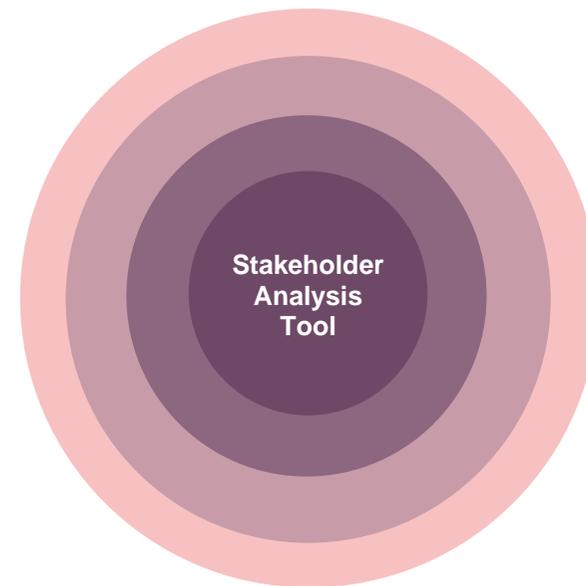
## APPENDIX 7: STAKEHOLDER ANALYSIS TOOL

A useful tool for thinking about and planning networking is the Stakeholder Analysis Tool.

Ask an individual to identify all of their current contacts and place their names in a series of concentric circles as follows:

- Those in the middle are those with whom they have a warm and mutually positive relationship – people who would recommend them to others and whom they feel close to at work.
- People in the second circle are good contacts whom they know well and are liked and respected by.
- People in the third circle are those whom they don't know very well and/or who they may not have such a good relationship with but who are/could be important to their future career development.
- People in the final circle are those whom they don't know at all and/or people with whom they have a poor relationship - but whom it might be useful to 'bring in' for their future career development.

Once the names have been placed in the circles, you can work together to develop an action plan which aims to move key people in closer to the centre. This might involve your sponsee attending networking events or meetings, seeking out new projects or placements, work shadowing, considering job moves etc.



## APPENDIX 8: WORKING WITH LIMITING BELIEFS

Many of us have limiting beliefs about ourselves and our abilities. Limiting beliefs in under-represented groups will be more common than in white Caucasian males and as a sponsor you need to be able to recognise them and work with your sponsee to challenge them.

Limiting beliefs might be anything from: 'I'll never be a director because I'm not confident enough' to 'when x happens, I won't deal with it well,' or 'I can't be my real self, or I'll be judged' (and many more). The biggest problem with limiting beliefs is that they force people to live below their potential.

By recognising a limiting belief when you hear or see it and by discussing it with your sponsee, you can challenge it and help them to find a new way of thinking which is enabling rather than limiting.

The four steps are:

- 1) Agree the outcome which your sponsee is aiming for.
- 2) Identify their limiting belief(s) about that outcome or the journey to it.
- 3) Ask them to consider the consequences of that belief on their desired outcome.
- 4) Coach them to find a new belief which is realistic *and* believable, whilst also empowering rather than limiting.

This simple questionnaire can be used to help your sponsee to consider a particular limiting belief. You can review their responses and coach them towards developing an alternative perspective / more positive belief.

## IDENTIFYING LIMITING BELIEFS AROUND GOALS

### I deserve to achieve (my goal)

1	2	3	4	5	6	7	8	9	10
Do not believe								Completely believe	

### I have the skills and abilities necessary to achieve (my goal)

1	2	3	4	5	6	7	8	9	10
Do not believe								Completely believe	

### It is possible to achieve (my goal)

1	2	3	4	5	6	7	8	9	10
Do not believe								Completely believe	

### (My goal) is desirable and worthwhile

1	2	3	4	5	6	7	8	9	10
Do not believe								Completely believe	

### (My goal) is acceptable to others

1	2	3	4	5	6	7	8	9	10
Do not believe								Completely believe	

## APPENDIX 9 – COACHING TECHNIQUES

You may sometimes find that instead of offering advice or arranging a new experience, what your sponsee needs is help with thinking through an issue for themselves. It may be that they have a concern about their career or have identified a limiting belief - or even that something has affected them at an emotional level, and they want to consider it more deeply. This is when you need to move into coaching mode.

Individuals think best when:

- ✓ They are respected and people show a genuine interest and delight in them
- ✓ They are comfortable, relaxed and not rushed
- ✓ They are asked incisive questions and are challenged without feeling judged

In your quiet presence, important things can happen for your sponsee; fresh ideas can emerge, confusion can dissipate, painful feelings can subside, and creativity can take over.

Some of the benefits of coaching are:

- Your sponsee feels supported and gains confidence more quickly
- Your sponsee feels more motivated to change and to take responsibility for that change
- The learning is deep and sustainable – your sponsee is committed to the outcome because they have generated it themselves

In her book “Coaching to Solutions”, Carole Pemberton introduces the FAST model as a way of checking that coaching conversations are working:

**F** – is the conversation Focused and does it have purpose?

**A** – is it moving towards the person’s ability to act?

**S** – is it helping the person to find a Solution for themselves rather than holding onto the problem?

**T** – is it taking place at the right Time and is it Time efficient?

You can use this as a tool for measuring the success of a coaching conversation.

The two most important skills for you to use when you are coaching are listening and questioning.

## EFFECTIVE LISTENING

To be really effective, you will need to let go of your own thoughts and of the need to be useful; this can be difficult! Steps to deep listening include:

- ✓ Keep eye contact with your sponsee as they speak.
- ✓ Be fascinated with what they are saying and don’t interrupt unless it is to ask a question.
- ✓ Create space for talking without the pressure of time.
- ✓ Don’t judge.
- ✓ Know your job is to help your sponsee to think things through for themselves and not to tell them what to do.

## EFFECTIVE QUESTIONING

Top tips for asking good questions are shown below.

### Top tips for asking effective questions:

- ✓ Be clear about the purpose behind each question you ask.
- ✓ Make sure that your questions are open and not leading. You want your coachee to think for themselves and not be influenced by what you are thinking.
- ✓ Never undermine a person's self-esteem. For example, instead of asking "Don't you think that's a bit negative?" you might ask "So tell me some more about where that view has come from".
- ✓ A great way of asking a question is to reflect back what someone has said and to turn it into a question, "So what you're saying is...?" or "It's interesting that you say 'never' – what do you mean by that?".
- ✓ Use "solution focused" questions which make positive assumptions: "So how do you think you can resolve this?" or "What's the best way forward?" or "What's your next step?"
- ✓ Powerful questions help the person to shift their perspective, so questions such as "How do you think that makes others feel?" or "What impact do you think that will have on x?" can also be very helpful.
- ✓ Questions can also help someone to reframe a problem. 'What would your best friend tell you to do?' or 'What would x think or feel about that?' are good ways to help people to think through different options.

## WHAT OTHER COACHING TECHNIQUES CAN HELP?

If the conversation is more complex and you need to encourage your sponsee to think through a difficult issue for themselves, then the GROW\* model is an excellent, non-directive, step by step framework for you to follow.

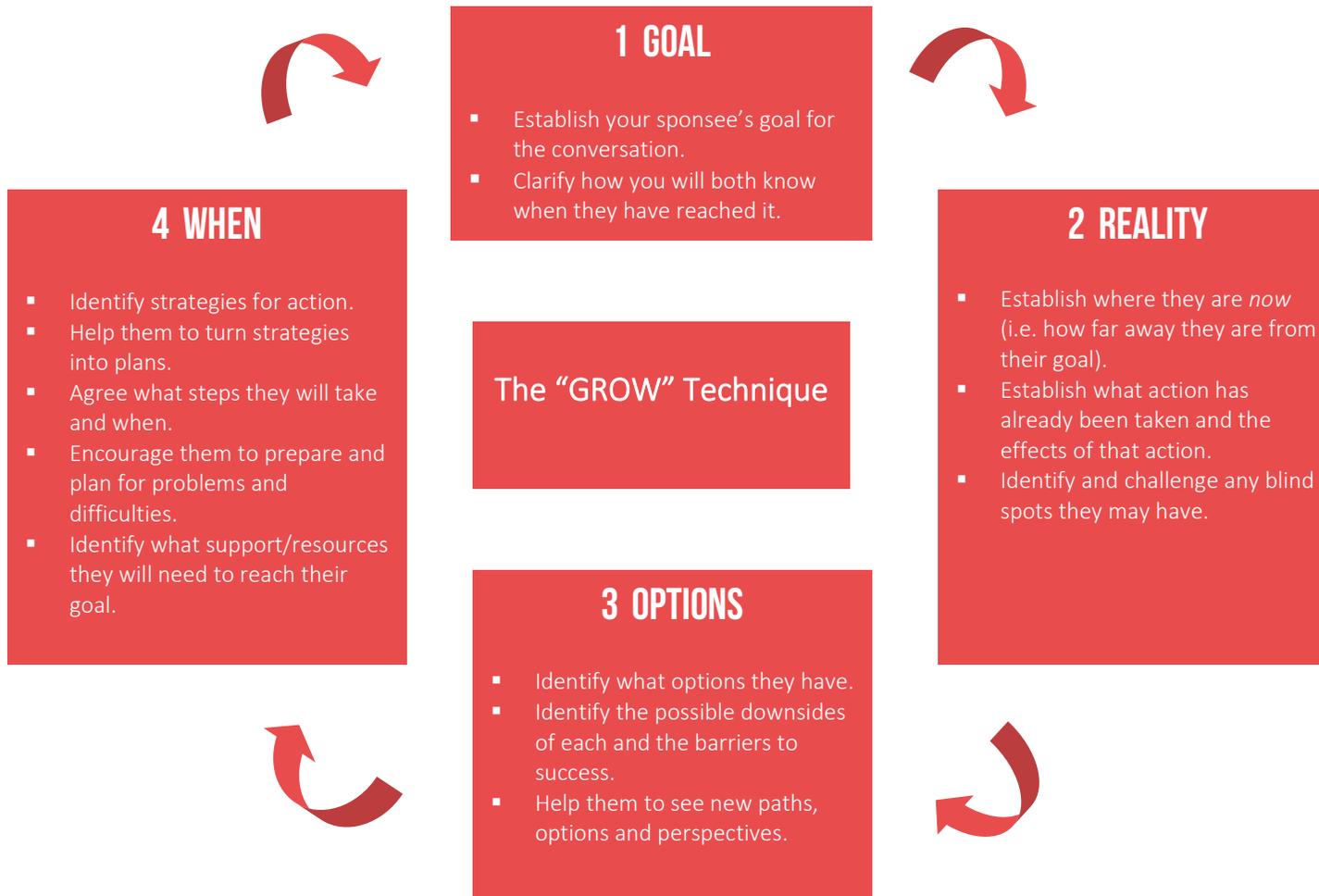
The GROW model effectively takes the coachee on a journey:

- First, you help them to decide where you are going (the goal).
- Next, you help them to work out where they are now (their current reality).
- You then work with them to explore various different routes to their destination (the options).
- In the final step, you help them to ensure that they are committed to making the journey and have prepared properly for the obstacles that they might meet on the way. In the final stage, you also help them to think about when they will start on their journey and what the first step will be.

Depending on the complexity of the issue, it can take several sessions to work through the four stages – but you might also cover them in 5 minutes.

The GROW model is explained in more detail on the next page and on Page 20 you will find a list of questions which can be used at each stage.

*\* The GROW model was developed in the 1980s by business coaches Graham Alexander, Alan Fine, and Sir John Whitmore.*



## A SET OF QUESTIONS FOR EACH STAGE OF THE GROW MODEL:

### Step 1 – Goal

- What do you want to achieve?
- What does success look like for you?
- What would you like to work on?
- What would you set your sights on if you knew you couldn't fail?
- Imagine you've achieved your goal. What does it feel like?
- What will achieving your goal give you?
- Imagine a year into the future, what is your ideal situation?
- Deep down, what do you really want from your work?
- What is it that causes you most dissatisfaction? What lies behind that do you think?

### Step 2 – Reality

- Describe your present situation.
- What is the hardest part about that for you right now?
- How do you feel about it?
- What is happening right now?
- Who else is affected by this?
- What are the good things about not achieving your goal?
- What have you done about your goal so far?
- How effective was your action?
- What has stopped you from making further progress?
- What resources do you have now?
- What are the positive by-products of keeping the status quo?

### Step 3 – Options

- What are all the different ways you could approach this issue?
- Make a list of all the possibilities.
- Who else could you consult to give you more options?
- What else could you do?
- What would you do if you had more time/funding/support ...?
- What would you do if you could start again with a clean sheet of paper?
- What would your best friend/parent/most learned person you know in this field advise you to do?
- What are the advantages and disadvantages of each of your options?
- Which solution appeals to you the most or makes you feel the most positive?
- Which will give you the most satisfaction?

### Step 4 - What will you do and when?

- Which option have you chosen?
- To what extent will it meet all of your objectives? What won't it do?
- From where you are now, what could a first step be for moving towards your goal?
- What milestones will you set along the way?
- How will you measure your success?
- When precisely are you going to start?
- What might hinder you? What will you put in place to deal with this?
- What personal resistance do you have?
- Who else needs to be involved?
- What support do you need and from whom?

## APPENDIX 10: EVALUATION QUESTIONNAIRE

Both of you complete the following questionnaire and compare your responses to help you to evaluate how your sponsoring relationship is going.

Goals	Score 1-5
We both have clear goals and have a good understanding of one another and our needs.	
Relationship	Score 1-5
I feel that I am listened to without being judged.	
I feel confident and secure that we have one another's backs and that what we discuss is kept confidential.	
I am able to be honest and open and we trust one another.	
Our meetings are constructive and focused.	

Outcomes	Score 1-5
I feel challenged and have developed as a result of the sponsoring.	
The main benefits from the sponsoring programme have been:	
How could the sponsoring be/have been even better?	
Any other comments:	

## APPENDIX 11: CHECKLIST FOR FDS FOR CREATING AN INCLUSIVE CULTURE

Global management consultants, McKinsey have identified that organisations with more diverse workforces perform better financially. If you are a DoF or a CFO, you will be able to influence some of the workplace systems and processes which will help you to develop a more diverse workforce.

In her book, 'Closing the Gap – 5 Steps to Creating an Inclusive Culture', Teresa Boughey outlines her 'tribe5 Diversity and Inclusion' methodology. Here are a number of questions to use as a checklist for developing a truly diverse culture within your finance team.

<b>Strategy</b>
Do you know what your diversity ratios are compared with other finance departments, other departments in your organisation and other organisations? Do you know where your ratios need to improve? Do you have a plan to make those improvements?
<b>Systems and processes, policies and procedures</b>
Recruitment - Where do you recruit from? How is the advertising done? If you use an agency, do you know that they use processes which are free from bias? What language and tone are used in your advertisements? What interview questions do you use? Are people properly trained to conduct fair and unbiased interviews? Do you use any other assessment techniques – e.g. tests, assessment centres, psychometric assessments,

presentations etc? Do any of your recruitment processes or techniques discriminate in any way?
Working hours – What opportunities are there for staff to work flexibly? Are they open to anyone?
Do you have policies in place for ensuring that people are dealt with fairly and for making it easy for people to raise an issue if they feel they are not?
How regularly do you seek employee feedback about quality and diversity issues within your department?
Have you signed up to FFF's Equality and Diversity Commitment Charter? What has this meant for your finance systems, processes, policies and procedures? What has changed? What still needs to be done? Where are the priorities? Are they reflected in your Strategy?
<b>Leadership</b>
Do your managers conduct the performance appraisal process properly? Are all of them fully trained and able to hold constructive conversations with staff? Do you make sure that these conversations happen? Are people encouraged to speak about their career aspirations on a regular basis? Which of your staff are keen to develop and how do you know this?
Are your supervisors and managers aware of diversity issues? Do they champion inclusion and diversity? Do they take time to listen to your staff? Is your team trained in unconscious bias? How clear are your leaders that it is their job to create a great place to work? How good are they at it? What else can you do to develop an equal culture where diversity is valued?

To what extent will your leaders take action if people behave inappropriately?
Do you promote an environment which is free from bullying and harassment? How easy is it for people to raise an issue if it occurs?
Do you carry out exit interviews to understand the real reasons why people leave your team? What have these told you in recent years? Do you need to do anything about this?
Do you host or support any diversity and inclusion groups or networks? Do you have a diversity champion in your team? Do you know what other DoFs are doing about diversity and inclusion? What can you learn from them and from other organisations?
<b>Resilience and wellbeing</b>
Resilience – what sort of environment and culture do you create through your leadership style? How many of your staff feel that they have to take work home with them and/or work long hours? Is the culture supportive of work-life balance? How does the culture impact on different groups within your team?
Do you encourage honest conversations to take place about health and wellbeing? Do you have systems and processes in place to assist people who need help with stress, anxiety or mental health?
<b>Development of people</b>
Do you review the training needs of staff and offer opportunities for everyone? Do you offer coaching and mentoring to staff? How do people

access development opportunities? What range of development opportunities do you offer?
Do you do any succession planning within finance? Do your managers understand their role in spotting and developing future talent?
Do you have any return to work schemes? Do you have good onboarding processes for returners?
Does your organisation structure enable you to be flexible in offering development opportunities to people? How many people have been promoted from within your finance team? How many of these are from minority/disadvantaged groups/

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