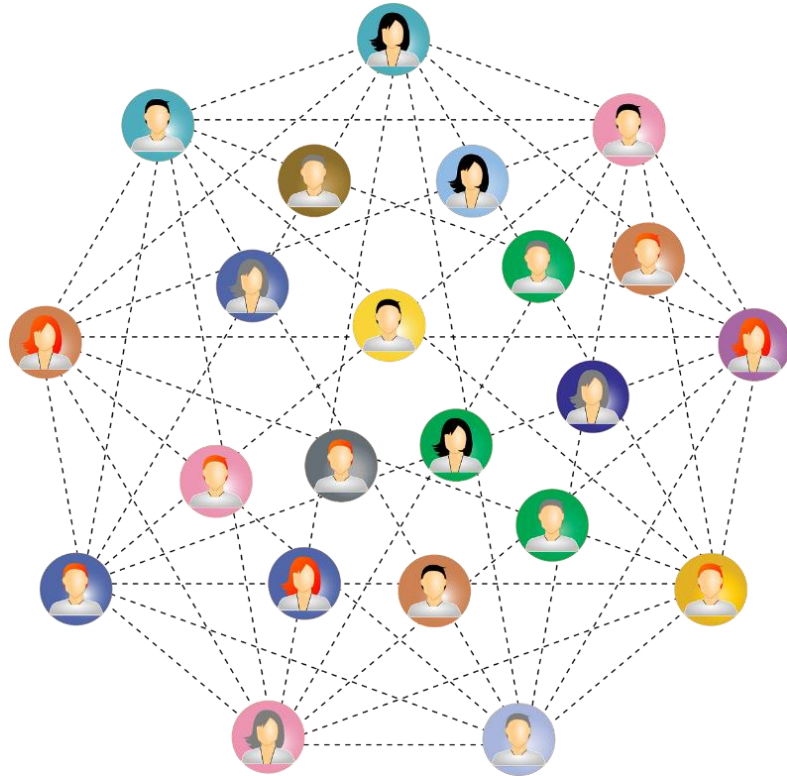# Introduction to Workforce Planning
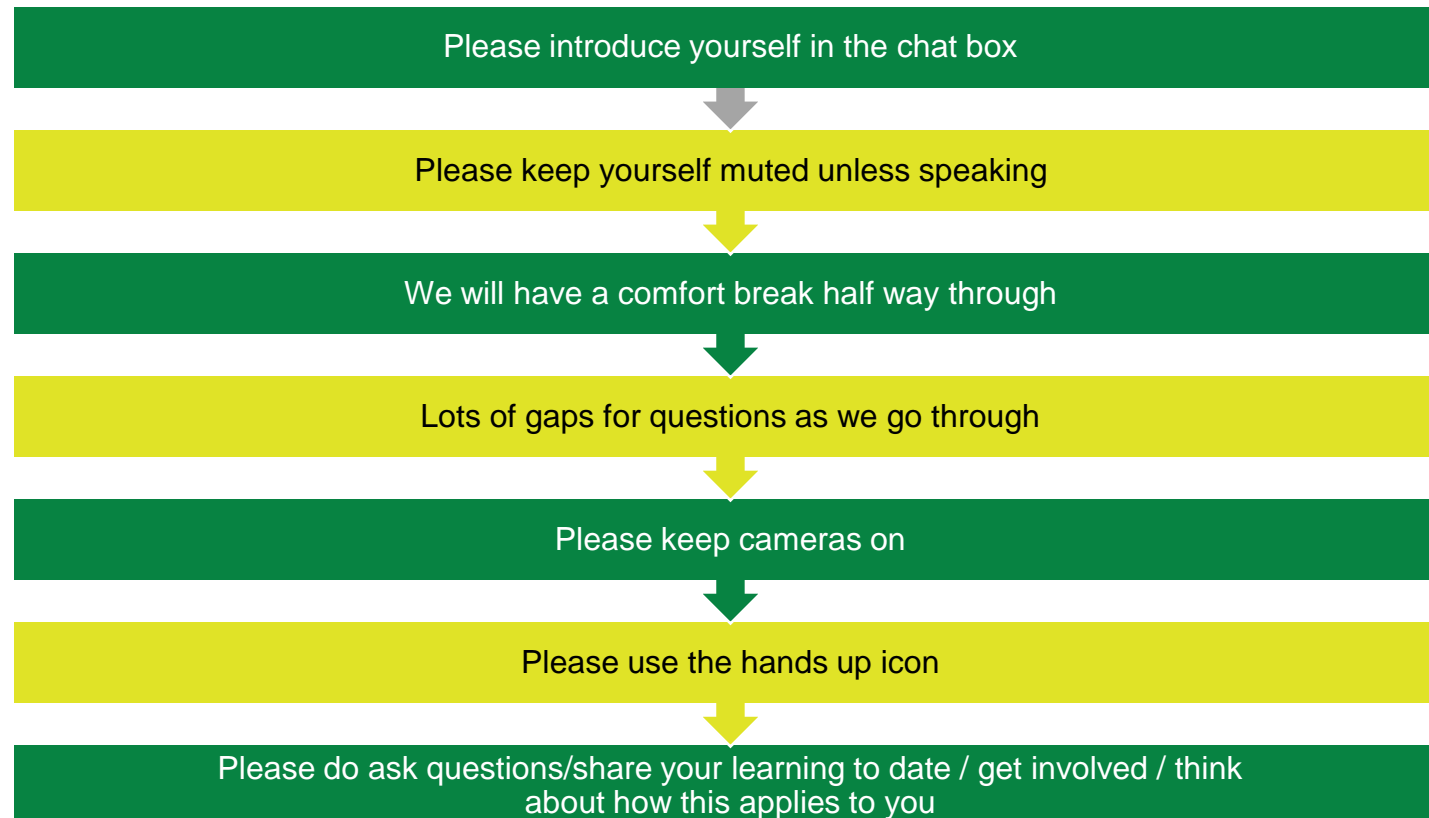
Name & Title of the facilitator (if required)

Introductions

- Name
- Role
- Service/s

Housekeeping - Virtual

Please introduce yourself in the chat box

↓

Please keep yourself muted unless speaking

↓

We will have a comfort break half way through

↓

Lots of gaps for questions as we go through

↓

Please keep cameras on

↓

Please use the hands up icon

↓

Please do ask questions/share your learning to date / get involved / think about how this applies to you

Before we start…

- How many of you have had formal workforce planning training to date?

- How many of you have an existing team / service or organisation workforce plan?

Content of the session

- What is Strategic Workforce Planning and why is it valuable?

- What is the Six Step Methodology?

- What support for Strategic Workforce Planning is available in the Integrated Care System (ICS)?

What is Strategic Workforce Planning and why is it valuable?

NHS Workforce Planning Guide

*Six Steps Approach to Workforce Planning programme -* elearning for healthcare

At a glance…

- *Resource Planning* is the activity taking place within the current year and is focused on how to deploy people to fill the gaps that result from natural workforce evolution (eg absence and turnover).

- *Operational Workforce Planning* is focused on the next year and looks at the workforce that is needed to accomplish the strategy.

- *Strategic Workforce Planning* is concerned with multiple years and is concerned with the people needed to accomplish the long-term business strategy.

Adam Gibson - What is workforce planning? – Agile Workforce Planning

Workforce Planning in a System
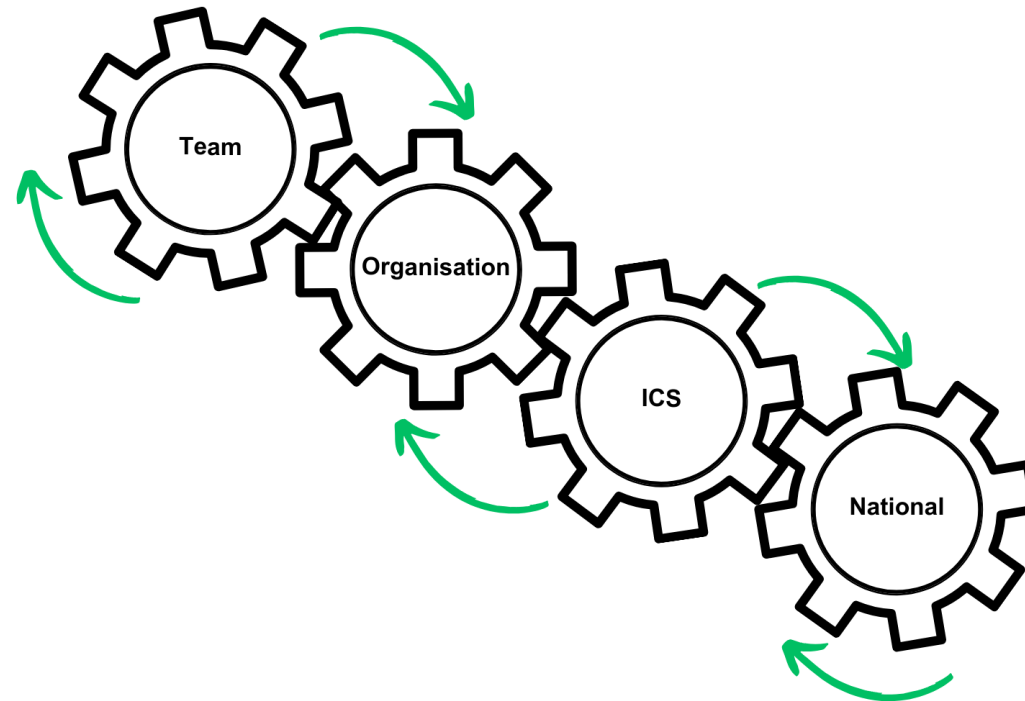
'A system is never the sum of its parts, it's the product of their interaction.'

Russell Ackoff

Principles of Workforce Planning

The 7 Rs of Workforce Planning

Right Cost · Right People · Right Skills · Right Shape · Right Size · Right Time · Right Place

- Ensures your organisation has the right people, right skills, and is the right size, to deliver high quality patient care at a cost you can afford.

- "Workforce planning is a core business process to align changing organisation needs with people strategy." "It doesn't need to be complicated… it provides the basis for better decision making."

Chartered Institute of Personnel and Development.

It's both an Art and a Science…

What is the value of strategic workforce planning?

- Manage the team / service more effectively

- Encourage teamwork

- Make best use of current workforce

- Plan for education and training needs

- Develop new, more flexible careers

- Prepare for future changes
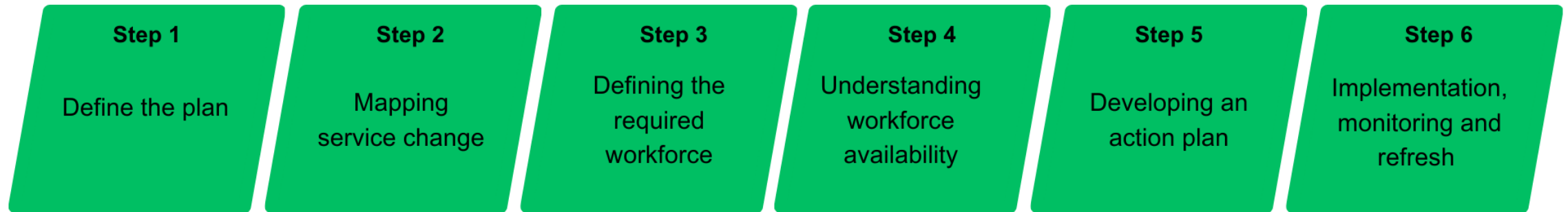
- Prevent staffing crisis and shortfalls

What is the Six Step Methodology?

Case Study

Populated by the facilitator (if required)

Provide an overview of the case study

What is the Six step Methodology

| Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Define the plan	Mapping service change	Defining the required workforce	Understanding workforce availability	Developing an action plan	Implementation, monitoring and refresh

The Methodology developed by Skills for Health offers:

- a systematic practical approach that supports the delivery of quality patient care, productivity and efficiency
- assurance that workforce planning decisions taken are sustainable and realistic
- a scalable approach, from small ward-based plans to systems
- both a linear & cyclical process

Step One: Defining the Plan

- This is the critical first step in any planning process.

- You must be clear why a workforce plan is required and what it will be used for.

- You must determine the scope of the plan: whether it will cover a single service area, a particular patient pathway or a whole health economy and, given this, be clear who is responsible for ensuring the plan is delivered and who else will need to be involved in the planning process.

Step 1
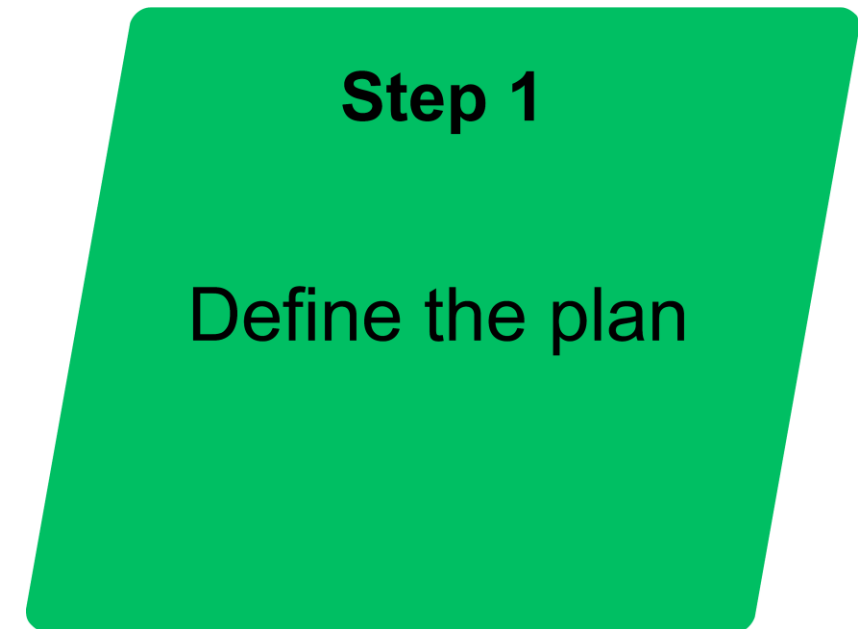
Define the plan

Defining the Plan - Checklist

Purpose

- ❑ What is the problem you are trying to solve?
- ❑ What will a good plan enable you to do?
- ❑ Who initiated the plan and why?
- ❑ Who will the plan impact upon?

Scope

- ❑ What geographical area is covered by the plan?
- ❑ What services and organisations does it cover?
- ❑ What types of staff are covered?
- ❑ What client groups does the plan cover?
- ❑ Is this a short term or long term problem and solution?

Ownership

- ❑ Who owns the workforce plan?
- ❑ Who needs to be influenced if the plan is to be successful?
- ❑ Do stakeholders understand their part/contribution to the delivery of the plan?
- ❑ Is everyone involved signed up to achieving the plan?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step one

Step Two: Mapping service change

Step 2

Mapping
service change

- This is the first of three inter-related steps through which service reconfiguration is matched with changes to workforce.

- There may be a number of drivers behind service redesign.

Mapping service change - Checklist

Goals and benefits of change

- ❑ What are the drivers behind the service change?
- ❑ What are the costs and outcomes under current models?
- ❑ What are the intended benefits from the service change?
- ❑ How will the change be effectively monitored?

Drivers/constraints

- ❑ What are the forces that support the service change?
- ❑ What are the forces that hamper the change?

Option appraisal

- ❑ What different scenarios for service change have been considered?

Working models

- ❑ Does the preferred model deliver the described benefits more effectively than other models?
- ❑ Or is the model simply more likely to be achievable given the anticipated constraints?
- ❑ Is there a clear and shared understanding of the future service configuration based on the patient experience, patient outcomes and financial realities?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step two

Step Three: Defining the Required Workforce

- This step involves identifying the workforce needed to deliver the reconfigured services, the skills needed by the workforce, as well as the types and numbers of staff required.

- This will involve consideration of which types of staff should best carry out particular activities and may lead to consideration of new roles and new ways of working (including technological / patterns of work etc.).

- The types and numbers of people needed to achieve planned service activities can be described as 'workforce demand'.

Step 3

Defining the required workforce
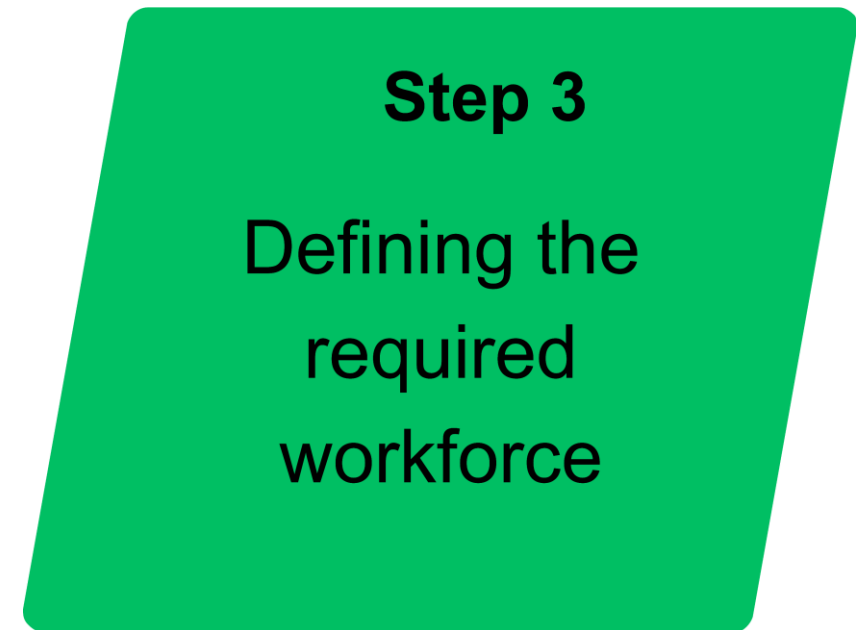
Defining the Required Workforce - Checklist

Activity analysis

❑ What are the key tasks within the new service delivery model?

❑ Have the activities been broken down into skills, time, individual or team?

❑ Has the standard required been identified including links with other activities?

❑ How are roles constructed including duties and responsibilities?

❑ Have new roles been identified?

Types/numbers

❑ Have the units through which the service is delivered been identified - ward, department, team & organisation?

❑ Have the case load and case mix been identified for individual service units (ward, department, team, organisation)?

❑ Has an assessment of the size and composition of the team needed to deliver the service been identified?

Productivity and new ways of working

❑ Have productivity implications been considered based on technology, therapeutic advances, patterns of working, service models and redistribution of tasks?

❑ Have different blends of skill mix been measured?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step three

Step Four: Understanding Workforce Availability

Step 4

Understanding workforce availability

- This step involves describing the existing workforce in the areas under consideration and its existing skills and deployment. It is important to understand the impact of the age profile of the current workforce and levels of staff turnover in order to understand what workforce is likely to be available in the future if no changes to roles or deployment take place.

- As has already been stressed, it may be the case that the ready availability of staff with particular skills, or alternatively, the shortage of such staff itself contributes to service redesign and that steps 2 and 3 will need to be revisited considering the analysis of the current workforce.

Understanding Workforce Availability - Checklist

Current workforce

- ❑ What are the characteristics of the current workforce?
- ❑ Has this been described in terms of numbers of certain types of staff, skills or service unit?

Workforce forecasting

- ❑ What turnover/attrition is expected and what numbers are in the commissioning pipeline?
- ❑ What influences on supply are there even with no service change (e.g. shorter working hours and the Working Time Directive)
- ❑ What is the local labour market?
- ❑ What is the anticipated competition for skills?

Options

- ❑ What models for retention can be developed to increase supply e.g. redeployment, retaining, recruitment?
- ❑ Have options been analysed and costed to increase workforce availability?
- ❑ Have the options for working differently been analysed and costed?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step four

Step Five: Developing an Action Plan

- This step involves reflecting on the previous three steps and determining the most effective way of ensuring the availability of staff to deliver redesigned services, even if this means some further service redesign. A plan for delivering the right staff, with the right skills in the right place needs to be developed with milestones and timescales.

- You should also include in your plan an assessment of anticipated problems and how you will build a momentum for change, including clinical engagement.

Step 5

Developing an action plan

Developing an Action Plan - Checklist

Gap analysis

- ❑ Have you undertaken a gap analysis of each scenario?
- ❑ What changes are needed to the current workforce?

Priority planning

- ❑ What are the key hotspots that need the most significant change?
- ❑ What cold spots need the least change?

Action planning

- ❑ What is the plan based on your 'best' option?
- ❑ How do education and other strategies support the plan?

Managing change

- ❑ How do you build momentum for change?
- ❑ How do you sustain the momentum for change?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step five

Step Six: Implementing, Monitoring and Refresh

Step 6

Implementation, monitoring and refresh

- The plan must be delivered effectively and will need periodic review and adjustment. The plan will have been clear about how success will be measured and may have tried to anticipate any unintended consequences of the changes.

- However, there needs to be periodic monitoring and review so that any corrective action can be taken.

Implementing, Monitoring and Refresh - Checklist

How to ensure your plan is delivered

❑ How are the outcomes and unintended consequences going to be measured?

❑ What are the key milestones of your plan?

❑ What is the process for revisiting your plan and refreshing any requirements?

Case Study

Populated by the facilitator (if required)

Review Case Study following Step six

Case Study

Populated by the facilitator (if required)

Review Case Study covering an overview of all six steps

What support for Strategic Workforce Planning is available in the Integrated Care System (ICS)?

ICS Resources

- https://www.skillsforhealth.org.uk/info-hub/six-steps-methodology-to-integrated-workforce-planning/

- https://www.england.nhs.uk/integratedcare/what-is-integrated-care/phm/

- https://icsacademyexchange.hubkencore.com/

- Six Steps Approach To Workforce Planning - elearning for healthcare (e-lfh.org.uk)

ICS Follow up Support

- Dedicated ICB Workforce Planning Leads
- ICS/B Academy and System wide colleagues
- ICS Workforce Dashboard

Next Steps

- Report Template is currently under development

- Full Workforce Planning Checklist – Available on the Exchange

- Review completed Workforce Plans within the system – Available on the Exchange

Thank you for your time

Any Questions