

Six Steps Methodology to Integrated Workforce Planning®

Step 1 Define the plan	This crucial first step in planning involves clarifying the need and purpose of the workforce plan, determining its scope, identifying responsible parties and involved stakeholders, whether for a single service area, patient pathway, or entire health economy. Data and intelligence are prerequisites and should underpin the plan.
Step 2 Map the service change	The first step in service redesign involves addressing patient choice, delivery changes, care advances, or financial constraints, clarifying costs and outcomes, identifying benefits, and assessing the preferred model's feasibility and support.
Step 3 Define the required workforce	Map new service activities against the change the plan is trying to achieve, identify skills and staff that are needed, determine optimal staffing levels to reduce costs and improve patient experience and potentially create new roles and work methods.
Step 4 Understand workforce availability	Describe the existing workforce in the areas under consideration, its existing skills and deployment, plus any problem areas arising from its age profile or turnover. It may be the case that the ready availability of staff with particular skills, or the shortage of such staff itself contributes to service redesign and steps 2 and 3 will need to be revisited.
Step 5 Develop an action plan	Reflect on previous steps to guarantee the most effective way of ensuring availability to deliver redesigned services. Develop a plan with milestones that deliver the right staff, with the right skills in the right place at the right time.
Step 6 Implement, monitor and revise	Periodically review and adjust the plan, measuring success, intended and unintended outcomes, and identifying opportunities to take continuous action. This step is significant and requires attention to ensure the plan is sustained.



Jon Freegard - Practice Principal, Workforce Development
jon.freegard@wdtrust.org.uk

Theresa Gatfield - Senior Consultant, Workforce Planning
theresa.gatfield@wdtrust.org.uk



Workforce modelling

A useful resource in workforce modelling, steps required and advice on how to get started with problem formulation.

Overview

Our approach to workforce modelling is aligned to our Six Steps Methodology to Integrated Workforce Planning®.

- Problem formulation
- Data collection
- Model development
- Quality assurance
- Scenario planning
- Monitoring and evaluating

Data collection

The objective is to translate the problem into a model that can be analysed; the required data will be driven by the purpose of the model.

Model development

A baseline model is developed in consultation with stakeholders and informed by problem formulation and availability and quality of data.

Quality assurance

Verification and validation is used to support quality assurance of the model, helping confirm the outputs meet the required purpose.

Scenario planning

To help prepare for the future different scenarios can be modelled to test potential impact(s) on workforce plans.

Monitoring and evaluation

The model is used to monitor and evaluate workforce strategies, feeding back into iterative workforce plans.

How to get started with problem formulation

“Let's work the problem, people. Let's not make things worse by guessing”
- Gene Kranz

The temptation with workforce modelling is to jump to a solution without first defining what is trying to be achieved.

Working with key stakeholders to gain a clear understanding of the problem, and to reach an agreement on what should be the focus, is a crucial first step.

This should include:

- Consideration of what has been done before to solve the same, or similar problem and;
- Reviewing what has been done elsewhere, learning from that and adapting as necessary.

At this early stage, the most useful approach organisations can take is to:

- Speak with stakeholders; map out who needs to be involved, informed, and who might influence this.
- Check what's already been done: review previous efforts, what worked well and what didn't work.
- Truly understand the problem: is there a consensus on the priority issue and what is the information that confirms this?
- Define the desired results: be clear on what you're trying to achieve. Articulate goals, how these will be measured and any contingencies that may be needed.

Only then can organisations arrive at the stage whereby a preliminary model representation (required for the next steps) can be developed.