



The Association of Health & Care Workforce Planning



Skills Builder

Skill and Level Descriptions

September 2022

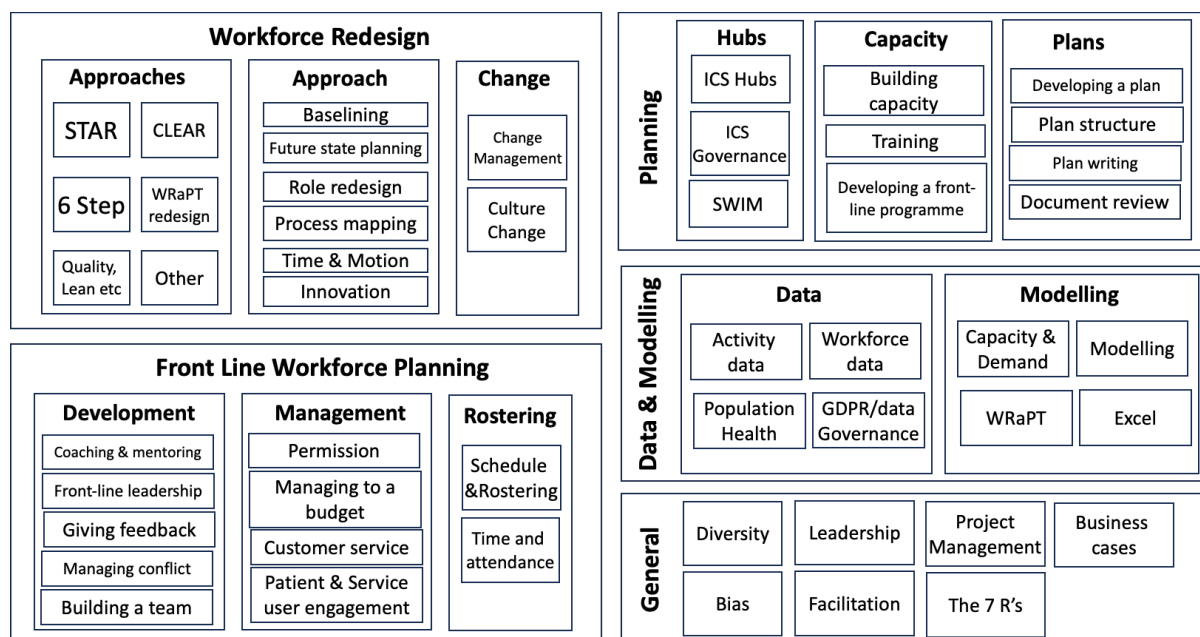
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Overview

The subject of workforce planning is huge – covering everything from the front-line skills needed to match staff to demand in the short term, through workforce redesign, modelling and developing workforce plans to large-scale system hubs.

We split the skills you may need into 5 sub areas and more than 50 individual skills, as set out below:



The good news is, you don't necessarily need to know them all, it depends on your role. In the skills builder, you will be able to see the skills we suggest you might need for a range of roles, including:

- Transformation lead,
- Organisation workforce planning lead
- Health & Care system or place workforce lead
- Front-line manager – service manager, team leader, practice manager etc
- HR Business Partner
- Executive lead
- Other

Levels of skill

When assessing your level of skill, you can consider the following definitions:

- Awareness – You understand what it is, and enough about it to explain its core features to others.
- Foundation – You have developed a basic understanding of the subject through training and have experience of using the learning.
- Expert – You have developed your understanding of the subject further through additional research and/or its use on multiple occasions. You could train others in it.

The Skills- Workforce Planning

When reviewing your skills, you can consider the following definitions for the areas:

Workforce Planning

Workforce Planning has many definitions. It is defined in the NHS by The Kings Fund as

“Successful workforce planning for the NHS ensures that it has the right number of staff, with the right skills and competencies, in the right place, at the right time to deliver services that provide the best possible patient care and meet demand, within an affordable budget.”

And by the UK’s Health Education England for all in health and care a:

“Supporting the delivery of excellent health and care by ensuring that the **workforce of today and tomorrow has the right numbers, skills, values and behaviours, at the right time and in the right place.**”

Subtle differences there, but by taking elements of each we can see that it includes:

- Matching demand with capacity
- Timescales – from short to long term
- Skills, competencies, values and behaviours of the team
- Meeting financial budgets

What these don’t explicitly include, but which we also need to consider are:

- Focus on the needs of staff, especially their development
- How we do this – including redesign, recruitment and retention.



Workforce redesign

Workforce redesign is the mechanism by which we transform the system and or the workforce that delivers it. From changing the model of care so that we need new or different staff to deliver it, to detailed role redesign approaches, workforce redesign can be simple or complex, done at team level or across an entire Health & Care System. It also includes change management skills as a core set of competencies that are needed when transforming services.

Approaches

There are lots of workforce redesign approaches you can use – and it doesn't matter what approach you take, as long as you are doing something.

Workforce redesign approaches are methods by which you can take teams through the process of changing their system or workforce model so that they can better match staff to service user need. They typically include similar things – ensuring that projects are properly set up, and understanding of the current state, the development of the future, planning how to move from current to future, and then implementing it.

Some focus on one area more than another, some have the steps in different orders. Some are light, and some more complex – so it is worth knowing about the main ones and their various pros and cons.

STAR

One of Health Education England's (HEE) three main workforce redesign approaches – which includes both a very quick approach to redesign, and a repository of useful documents.

“A facilitated HEE Star workshop supports you to hold productive conversations about the challenges your healthcare system faces, and an accompanying online directory signposts to over 300 opportunities, products, and resources available through HEE that can help design solutions to these challenges”.

<https://www.hee.nhs.uk/our-work/hee-star>

6-step

Skills for Health's Methodology for integrated workforce planning can also be used for workforce redesign. The 6-step approach is the default approach to workforce planning and redesign used in health and care. It focuses on defining the workforce needed for a service change and then considering the staffing that you already have, before considering how to plan and implement the change.

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

CLEAR

CLEAR stands for Clinically-Led workforce and Activity Redesign – an approach that engages clinicians in workforce and system redesign. If HEE Star is the quick, light approach to redesign, CLEAR is the at the other end of the spectrum – with a detailed methodology, big data analytics and education at its core. Best used to address difficult clinical workforce redesign issues.

<https://www.hee.nhs.uk/our-work/workforce-transformation/clinically-led-workforce-activity-redesign-clear>

<https://clearprogramme.org.uk/>

WRaPT Redesign

WRaPT is the third and final approach used by Health Education England. WRaPT, which stands for the Workforce Repository and Planning Tool, is a free to use online workforce redesign tool for health and care in the UK, and available internationally on request. The team that developed it soon realised that people needed a methodology in order to use WRaPT, and that one was needed that worked, so WRaPT: Redesign was born. It is a pragmatic, results-focussed approach to workforce redesign.

<https://wrapt.org.uk/>

Quality, lean etc

Workforce is a part of system change – along with process design, organisational design, digital innovation, facilities and estate redesign. Thus, any transformation approach can be used for workforce redesign. These system approaches include Lean, 6-sigma and Theory of Constraints.

Other

As we say, it doesn't matter what approach you use to workforce redesign. As well as the ones mentioned here, there are many others we have seen – including Population Centric (focusing on service-user needs), the Calderdale Approach and SWIPE.

Approach

As well as gaining an understanding and expertise in different approaches, there are specific skills needed for workforce redesign that can really deepen your understanding and competence in it.

Baselining

The specific skillset around developing and presenting a clear view of your current state – setting out key aspects of your current staff and the activity they do, as well as the issues and opportunities faced (including vacancies). This includes both qualitative and quantitative data – and how it is collected, analysed and presented for stakeholders.

Future state planning

The development of a clear vision for the redesigned workforce and/or system. This skill is about being able to engage stakeholders in such a way that they develop responses to the issues and opportunities that they face.

Role redesign

This is the absolute core of workforce redesign. Much of what is required is much more generic redesign to change the demand and the way in which that demand is addressed – but at some point we need to consider actual workforce redesign. There are at least five ways of undertaking role redesign, but at their heart they are about collecting information on a process, prioritising each task's importance and then matching skills needed and the skills available.

Process mapping

To undertake system and workforce redesign, you need to be able to map processes. There are many different standards and approaches for process mapping, many of which work for different purposes. Process mapping can be used in the current state and the future state parts of any redesign, but is most useful when undertaking detailed role redesign.

Time & motion

This is a really useful set of skills for current and future state mapping, and especially for role redesign. It can also be used when modelling – as when combined with activity it forms the core of understanding the number of staff needed. Time and motion studies involve timing how long people take to do tasks, and understanding movements between workstations to permit redesign and reduce the time taken to undertake tasks – and thus to meet the demand for health and care staffing.

Innovation

In this instance, innovation refers to the approach you take to introduce new ideas into newly redesigned approaches. It includes digital, equipment, facilities, organisational, workforce and process innovations. There are specific approaches you can use to researching, workshoping, investigating and presenting innovations to improve take-up, from small-scale research and presentation to large scale events.

Change

The set of skills that helps you bring about a situation in which people design and implement new and innovative processes, digital solutions and workforce models.

Change management

The application of a systematic approach to leading the people side of change so that the workforce redesign can move from the current state to an innovative and/or transformational future state.

It is important as workforce redesign needs to be transformational enough in its design, and needs to be implemented in full, in order to make the expected impact.

Culture change

Culture change in this context is the process by which we can influence or encourage employees to adopt the behaviours and mindsets of the health and care organisation or system. In this case, it is important as redesign and innovation needs to be constant in a fast-moving health and care environment, so building a culture that drives that reduces the more formal transformational project workload.



Planning

Planning as a generic set of skills includes the detail of developing a workforce plan, the co-ordination of plans and planning activity in a hub or collaborative and building the capacity needed across health and care systems to undertake workforce planning.

Hubs

This set of skills includes an understanding of how to develop and build workforce hubs and collaboratives, how to link workforce planning to organisation and system governance and a specific focus on system workforce maturity using the SWIM model.

Hubs

System workforce hubs or collaboratives are an approach to co-ordinating and driving workforce planning activity across a whole system or place. Including everything from developing a clear workforce strategy backed by clear numbers, to a collaborative meeting schedule to engage all stakeholders, development of workforce planning skills, Programme Management, research and clear links into governance – well-resourced hubs should be in place in every health & care system.

Governance

Implementing workforce plans and embedding workforce planning within health and care organisational systems requires strong engagement with executives and boards. The approach to driving this engagement for plan development, front-line manager skills development and ongoing monitoring of progress is covered under this heading.

SWIM

The System Workforce Improvement Model is a maturity model for health and care system workforce planning, based on the learnings from more than ten UK health and care systems including Manchester.

Capacity

This area covers the skills required for building workforce planning capacity in health and care systems and organisations.

Building capacity

This covers how to develop a programme of workforce planning skills development in your organisation or system, including reviewing skills, developing learning strategies, and undertaking skills needs assessments. The core of it is the running of the programme itself, focusing on the development of a pyramid of workforce planning skills – from a large base of people with an awareness, to a small group with mastery of the subject (and able to train others).

Training

Building capacity requires the ability to be able to train people in an engaging manner. This area covers the specific skills required to train staff, and to train the trainers.

Developing a front-line programme

A key element of building capacity in workforce planning is the development of skills for front-line managers. They require a broad set of skills that they are rarely trained in – which means that a programme of development is required for current staff, and for future managers. Such a programme is expensive in terms of staff time, so its benefits need to be identified in advance, and realised throughout the programme. Developing the approach to this programme is covered under this heading.

Plans

Workforce planning requires workforce plans. This set of skills covers everything you need to develop a plan including process, structure and approaches to writing the document.

Developing a plan

The process for developing a workforce plan from starting the work (as a project) through documenting the current state, identifying the future state and writing the document.

Plan structure

The mechanics of a workforce plan – what sections you need and what goes in each one.

Plan writing

When developing a plan, the output is the actual document itself. Hopefully the outcome is that the development of the plan will drive an improvement in workforce planning along the vision set out in the document. This outcome is more likely if the plan is well written and engaging, so specific writing skills are valuable.

Document review

Being able to review, and present a view, of documents are useful in redesign and in plan development (in fact, many of the same skills are used in both). This skill covers this area, and how to record and reference your researches.



Front line workforce planning

Front line workforce planning is the set of skills needed by front-line managers, be they team leaders, service managers, department heads, ward sisters, voluntary team leaders – anyone that runs a team of people. It mainly covers all the skills needed for short-term workforce planning – anything from decisions made in the moment to those taking place in an annual cycle. Despite its shorter term nature, it can have long-term consequences, and is vital in ensuring that service-user need is met by the right people, in the right place at the right time.

Development

The development skills within the area of front-line workforce planning cover the areas that team leaders need when building teams, and developing the skills of individuals. It is one of the single most important areas as it includes treating the team as a team – and caring about it as a team, and the people as individuals.

Coaching and mentoring

Coaching and mentoring are two different skills, but they are both important when developing the skills, behaviours and attitudes of the team and individuals. Coaching is an easy to understand but difficult to master skillset which involves you helping the individual

to achieve their goals themselves through a structured process. Mentoring is similar, but it is where you use your skills and experience to advise and train people to help them develop.

Front-line leadership

Leadership as a topic is huge, and can itself be split down into a variety of skills. With regard to workforce planning, leadership means ensuring that you lead a team mindfully – caring about the staff, providing a vision, sharing success with the team and being authentic.

Giving feedback

As part of the development of staff, this skill covers the specific ability to be able to provide meaningful feedback to staff in a way that it will have a positive effect.

Managing conflict

The skill of managing conflict is important in the development of teams and helps improve retention of staff. Managing conflict is the skillset that allows you to address issues between staff, and between staff and service users, quickly and proactively.

Building a team

Finally in the development area, this skill covers the ability to build a team from a set of individuals.

Management

The ability to manage staff covers a range of skills including the giving of permission, managing to budgets and focusing on customer service. It is important as workforce does not sit in isolation.

Permission

Permission is the ability to build a team culture where individuals feel able to innovate and make decisions, even mistakes, within a supportive environment.

Managing to a budget

Staffing often suffers when budgets have been exceeded, and cuts need to be made. The skills required to manage budgets are therefore important to workforce planning. This area covers understanding what a budget is, how to manage it, how to get back on track and cost control tactics.

Customer service

At its heart, workforce planning is a balance between capacity and demand – and service-users are at the heart of the demand for health and care services. This area covers the skills needed to be able to engage service-users in a positive way, including transactional analysis, assertion, communication, problem solving and (worst case) dealing with complaints.

Patient and service user engagement

As well as customer-service in the moment, the ability to understand service-user need both now, and in the future, is vital to matching your staff capacity appropriately to that need. Patient and service-user engagement covers a range of skills including customer journey mapping, population engagement and communication.

Rostering

The roosting skill section covers the details of scheduling and roosting, and time and attendance management.

Scheduling and roosting

Scheduling and roosting are technical skills that help the matching of staff to service-users on a fortnightly, weekly, daily and hourly basis. It covers annual planning, electronic roosting and manual roosting.

Time and attendance

This area covers the skills required to monitor when staff are attending or did attend work. If you can identify when staff are attending, you can better match staff with demand in the moment, and by identification who has attended work at any time you can clearly see how accurate workforce planning has been historically – on an hour to hour basis – helping you to better manage rosters. Some electronic roosting software includes time and attendance software.



Data and modelling

This technical section includes all the skills required to undertake workforce modelling – manual or electronic and everything in between – including the collection and analysis of the right data.

Data

In order to undertake modelling, you need data. This section covers the skills to collect activity and workforce data, and how to integrate the incredibly important population health data into the process. It also includes data governance, which you need to understand if you are collecting and processing data.

Activity data

Activity data is one of the hardest data areas to collect. This skill area covers an understanding of activity data – including the volume, the time it takes, expected ratios per activity and benchmarking – as well as how to collect and analyse it.

Population health data

Population Health data is information that highlights need for health and care services based on the factors of the population. Despite its importance, population health data is rarely used to drive workforce models, but it should be if we are to truly match capacity to health and care need – fairly.

Workforce data

This skill set includes the collection, understanding and analysis of workforce data. This includes the detailed workforce information on an individual or role level needed to drive basic demand and capacity models, retention, sickness, demographic data, skills information etc.

Data Governance

The handling of workforce data requires an understanding of data protection for your country – and possibly worldwide due to the global nature of IT systems and cloud storage.

Modelling

This covers the development of workforce models from simple manual/paper based systems through various levels of spreadsheet model to large scale bespoke workforce modelling systems. As a technical set of skills, mastery of this area allows the development of workforce models in a range of technologies – and the underlying basis for modelling.

Capacity and demand

The underlying core of workforce models is the balance of capacity (workforce) and demand (workload). This area covers the development of an understanding of both elements.

Modelling

This large area covers the underlying skills required in workforce modelling, no matter what system is used. It includes how to develop a model of the current state and the interim state, and how to set a future state. It also includes how to model the impact of different interventions.

WRaPT

WRaPT is the Workforce Repository and Planning Tool, a free-to-use online workforce redesign and planning system. Whilst it is intuitive, a degree of skill is needed to use it.

Excel

The development of spreadsheet models is typically done in Microsoft Excel. Whilst flexible, spreadsheet tools include certain inherent risks. This skill area covers how to design, develop and test workforce models in spreadsheets, and how to mitigate the main risks.



General

This final set of skills is a “catch-all” for remaining skills that are of importance for workforce planning. It includes an understanding of diversity and inclusion, leadership, facilitation of workshops, project management, how to develop compelling business cases and interventions for solving workforce gaps (known as the 7 R’s).

Diversity

Diversity and inclusion is a critical skill set for all workforce planning practitioners from the front-line to the system boardroom. This skill set covers understanding the importance of diversity and inclusion, and the tools required to ensure that your workforce is inclusive and diverse.

Leadership

This is the wide definition of leadership (as opposed to the front-line leadership already mentioned).

Bias

As well as diversity and inclusion, an understanding of bias – both yours and those of other people – is also important. There is specific training available for bias.

Facilitation

The development of a programme, and of future states often includes large meetings, workshops or larger events. Facilitating such events requires a specific set of skills that include how to set the event up for success, what to do at the start, how to deal with different people, how to handle tables and groups and what to do with the outputs.

Project management

Implementation of workforce projects is important, otherwise what is the point of undertaking redesign and other projects? The skill of project management is therefore vital. Programme Management is also a key element of workforce collaboratives.

Business cases

In a world of limited funding, it is often important to develop business cases for projects. Sometimes workforce plans or models are developed specifically for business cases (e.g. for a new hospital). An understanding of how to develop compelling cases, completely and quickly, is covered in this area.

The 7 R's

The 7 R's are a set of ideas or filling gaps between the current and future need for staff. It covers recruitment, retention, return to work, revitalising teams to improve efficiency, retraining staff, redesigning staff models and replacing staff (e.g. with AI or Robotic Process Automation). The ideas, and how to use them to generate pipeline plans, is considered in this section.