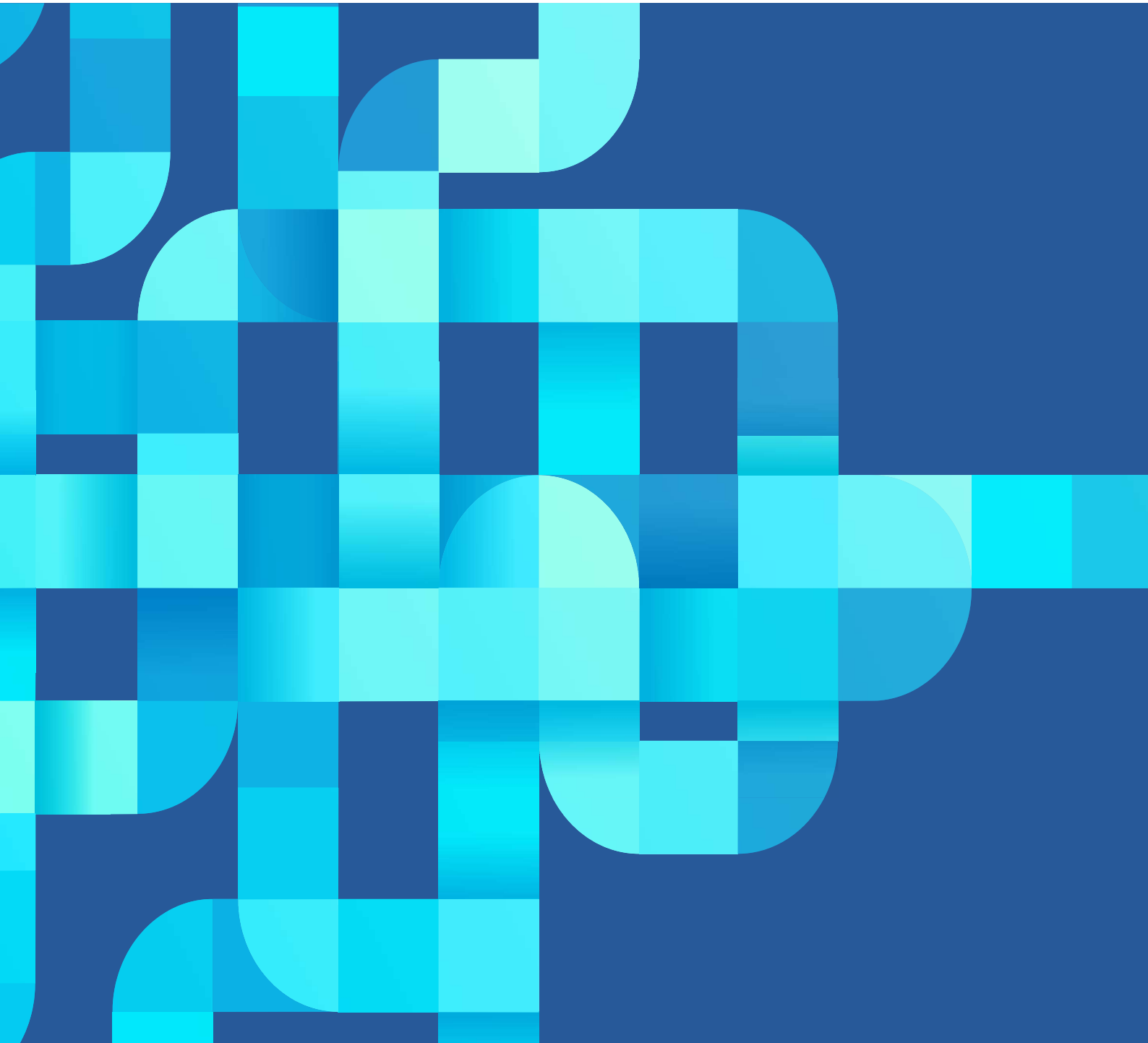


Accelerating Reform through Strategic Workforce Planning

A Tricordant White Paper

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The Challenge

Lord Ara Darzi's compelling examination, 'Independent investigation of the National Health Service in England', is a comprehensive and sobering snapshot of healthcare today. In his report he has laid bare the challenges facing patients, staff and leaders.

So now that we have the diagnosis, the question is, what next?

Darzi points to what the Government's anticipated 10-year plan might cover with strategic development of the health and care workforce critical to potential solutions.

- Re-engage staff and harness their talents to innovate and improve care.
- Move care closer to home and sustainably shift resources including specialist staff into multi-disciplinary community teams working in new digitally enabled models of proactive joined up care.
- Acute hospitals radically improving productivity through better management, technology investment and empowerment.
- Reformed structures to enable better collective management of resources including the health and care workforce.

Do we just wait for the 10-year plan? Wait to be told what to do? Darzi's own analysis is that such thinking is behind many of the problems of today. Rather we'd agree with Peter Drucker that....

***"The best way
to predict the future is
to create it."***



We believe **Strategic Workforce Planning** is critical to unlocking reform.

We all know there are no short-term fixes to many workforce challenges. Recognising a whole system response is needed this paper considers the Lord Darzi's challenge through actions of both Integrated Care Boards (ICBs) and NHS Trusts and indeed how these organisations need to work together in concert with other partners in local Integrated Care Systems (ICSs).

Both ICBs and NHS providers are entrusted with the crucial task of developing, implementing and monitoring strategic workforce plans for health and care staff together with the local voluntary, community and social enterprise workforce. These plans must align with the NHS Long-Term Workforce Plan whilst also catering to the unique local needs for effective service delivery and financial sustainability. Strategic Workforce Planning (SWP) is the process that facilitates this alignment. It supports collaboration between people leaders, service delivery leaders, and financial leaders, enabling the necessary conversations and collaborations that are pivotal to delivering an effective, funded plan.

Lord Darzi was clear it is a whole system challenge therefore our approach based on our unrivalled team's expertise is rooted in this need for collaboration. We believe in nurturing and supporting our workforce, viewing them as assets rather than mere resources. In a world grappling with a global shortage of health and care professionals, it is only by ensuring that they can work together efficiently and effectively that we can develop sustainable health services.

We also recognise the transformative potential of digital technology. It holds untapped potential to improve operational practice and efficiency across the care pathway and to enable new workforce roles. This digital-first approach can enhance patient access, streamline their journey through the system, and improve clinical and experiential outcomes. For the workforce, it offers opportunities to improve wellbeing, training, recruitment, retention, and clinical career progression, thereby reducing sickness rates and vacancies. For the health and care system, it can drive improved efficiency and effectiveness, delivering better value and more affordable services.

For the ICB, adopting a digital-first approach to SWP provides a system-wide perspective across care settings, care pathways, and providers. The ICB is uniquely positioned to take this strategic approach, working across primary, community, and secondary care providers, and across localities. The ICB can also collaborate across the whole Integrated Care System (ICS) where there are shared agendas with Local Authorities, even providing leadership for other system partners such as GPs, Pharmacy or VCSE where the workforce is small or fragmented. Thus, SWP for an ICB is a complex yet rewarding endeavour.

However, individual employers or employer collaboratives must focus their SWP on the role they can play to train, recruit, retain, and support their workforce as needed to deliver against the needs of their local communities, reflected in local ICP Strategies and ICB Plans. They need to define, plan, and deliver a workforce needed for efficient, effective, and affordable services.

Navigating the complexities of a digital-first approach to SWP can be challenging. ICBs and Trusts often require independent support to prioritise the best digital solutions given the local context, work through the service redesign consequences of the change required, assess the workforce implications, measure the potential impact on service efficiency and effectiveness, and assess the financial impact. The breadth of digital technologies available to bring about productivity change is vast and heterogeneous, making it hard to navigate. Understanding how best to approach this will ensure the right investment decisions for the system or organisation are made. Equally, being able to follow a simple development methodology is a crucial step in working out where the optimum transformation time and resource should be focused before then working through the final shape of the workforce required overall.

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How do we approach this?

Our foundational assumption for Strategic Workforce Planning (SWP) is that SWP is an organisational capability that encompasses processes, people, digital systems, and culture. Its purpose is to ensure that an organisation or even wider health and care system has the right workforce capacity and capabilities, at the right cost, focused on the right work, located where they are needed to both deliver the agreed strategy and respond to emerging events while mitigating key risks of over or undersupply. This means that SWP is a planning system that links business, finance, and people planning. It is owned by the business but requires a collaborative endeavour between these three functions to co-create the strategic workforce plan.

We use an iterative future focussed process that provide a line of sight between organisational assumptions about the medium and long-term future, such as when Robotic Process Automation or GenerativeAI will impact the operating model, and the actions required in the shorter term to get there. SWP is a blend of art and science – management decision making supported by data driven actionable insights, analytics, and modelling. This enables SWP to provide the mechanism to surface, analyse and manage business opportunities and risks related to workforce, for example to assess the viability of an organisational strategy from a workforce perspective.

**Strategic
Workforce
Planning**
*is a blend of art
and science*

What good looks like

From industry and our own experiences, the following define the basics of what good SWP looks like within a healthy organisation:

- Day to day, the organisation has the people it needs, with the right experience and skills, doing the right work in the right place, at a cost it can afford. A simple, but effective test.
- Leaders who seek to co-create an environment within which all people can thrive, so the organisation succeeds.
- The organisation has really thought about the future, and has a clear, commonly understood service plan to make its strategy real: understanding the need, what services will be provided to fulfill the need, and how those services will be delivered, this is what is called “the work”.
- There is a mechanism, potentially a stand-alone platform or a module within your HRIS, to define roles, skills, behaviours and rough numbers needed to do the work. A reliable, accessible, view of the organisation’s workforce available to do the work now and in the future, and an actionable plan to close any gaps between the two, all aligned to the financial plan.
- A culture of leadership and decision making that recognises 1. the need for collaboration between business, finance and people planning, and 2. the value to the organisation of investing in its people for the long term, sometimes at the expense of shorter-term priorities, i.e. willing to prioritise the important over the urgent.
- A culture of early and ongoing engagement to build commitment and ownership of strategic initiatives.

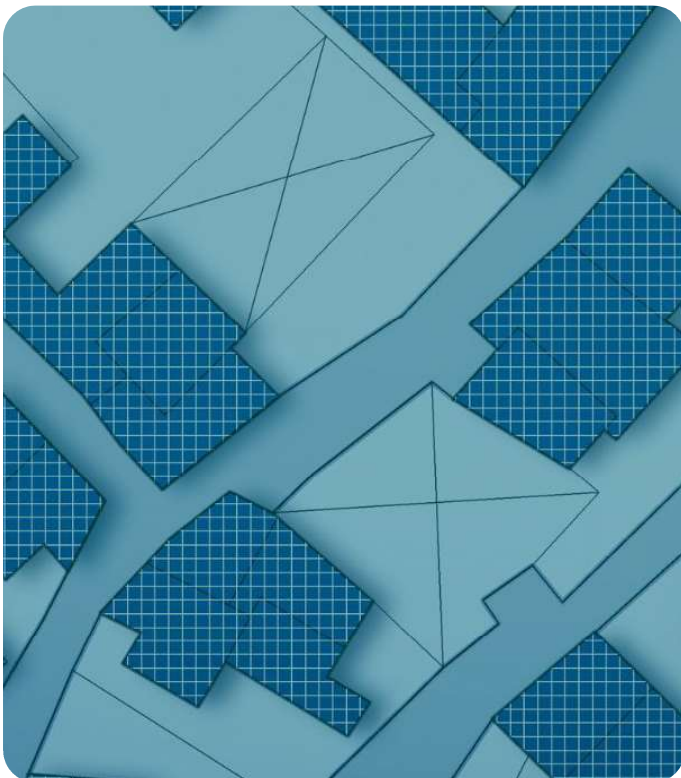
A few vignettes are used to inspire and to bring what good looks like to life, some of these are from outside the healthcare sector:

Strategic Insights In Learning Disability & Autism

We undertook a high-level scoping review of the cross-sector health and care workforce supporting people with learning disability and autism as part of a broader review for a county council and Integrated care board. To the surprise of local commissioners, we identified the local Psychiatry in LD training scheme was a national leader - which presented a real opportunity to attract the wider multi-disciplinary workforce to the area. The work also identified that the current fragmented commissioning across multiple providers undermined the ability to collate the future workforce needs such as for LD Nurses. This made it harder to work with Higher Education partners. We worked with the system leaders to identify how they can create a more joined up and aligned system approach - to improve outcomes for local people.



Supporting HMLR to become the Cornerstone of a Data-driven and Sustainable Economy



Clarity of land ownership is the cornerstone of a sustainable economy. His Majesty's Land Registry (HMLR) had adopted a new strategy to become a digital enterprise and recognised that the capacity and capability requirements of its workforce would change fundamentally. Working with a microcosm which represented the voices from the HMLR system, stressed tested their strategic thinking, and developed a baseline of assumptions impacting demand and supply over the next 3-5 years. Before HMLR had no common 'cross silo' view of how to implement the strategy over the 3-5 year timescale or sense of the strategic risk presented by the absence of such a view. We helped build 'sustainability' models for each capability/profession and a whole organisation SWP. Through the work we intentionally developed internal SWP capability and developed prototype excel based data models that enabled HMLR to continue the work into the next iteration.

How to get started

Why do organisations struggle to put Strategic Workforce Planning into practice? Based on our teams' extensive experiences and knowledge our top 3 reasons are:

1. Leaders and managers do not have the headspace to plan and act for the future, given the challenges of today. This can mean the urgent trumps the important.
2. Organisations will usually have a strategy, but many, if not most, cannot articulate what needs to be done differently for the strategy to become a reality.
3. Organisations do not always have a single source of truth when it comes to workforce data, nor the tools and expertise. This means leaders cannot make sense of what they have today to inform their decisions, let alone design and plan for the future.

Although all our clients are different, we find that getting started usually involves:

- Building a shared view of the problem(s) to be solved, the flip side of which is the benefits to be gained from an investment in SWP.
- Executive sponsorship, recognising that SWP is a business owned, if HR managed, capability.
- Acceptance from the outset that uncertainty and ambiguity will be higher initially
- intervention, but that the iterative nature of SWP enables coalescence around a set of common assumptions and associated actions.
- Using the iterations to refine and iterate a model SWP process to support the development of your SWP capability as you go.
- Building a minimum viable 'HR' data set from current and historic data extracts, providing an initial data driven view of the organisation and its workforce, patterns and trends. This can often be achieved rapidly in Excel, often generating actionable insights out of all proportion to the initial investment required.

Why work with us

1. Unparalleled Expertise in Workforce Planning: Benefit from our unparalleled expertise in strategic workforce planning, fielding team members who are recognised leaders in the field both nationally and internationally. This includes Rob Smith, former Director of Workforce Planning for the NHS in England, Giles Baxter, former Head of Workforce for the British Army, receiving an OBE for his work, and Jacque Mallender, an internationally renowned health economist. Jacque recently completed an economic evaluation of selected models for the Extended Surgical Team for NHS England, the results of which were used by the host Trusts to support spread and adoption of advanced practice and new support roles to improve surgical flow efficiency. Our specialists bring a unique mix and wealth of experience from multiple sectors and a variety of countries, ensuring your workforce strategies are backed by the latest insights and best practices.
2. Deep Insights about the impact of Digital Technology: Our team includes Patrick Mitchell, the SRO for the widely acclaimed Topol Review, led by Dr Eric Topol of the Scripps Institute. This review outlined recommendations to ensure the NHS is the world leader in using digital technologies to benefit patients. Additionally, Patrick led the design and development of Health Education England's workforce development tool, the STAR model. This has been successfully used across Trusts and ICSs to look systematically at their workforce supply.

3. **Practical and Rigorous Approach:** Our approach leverages economic analysis to understand what drives value informing decision-making at the highest levels while drawing on the wisdom of your people to co-create an agreed future and plan. With our data-driven, value-informed and co-created approach, leaders gain the confidence to make strategic workforce decisions that drive organisational and whole system success.

4. **Guidance Across Various Scales:** Whether you're an individual organisation, part of a collaborative effort, or overseeing a whole system, we provide tailored guidance to meet your strategic workforce planning needs. From local initiatives to system-wide transformations, we will help you navigate complex challenges and drive meaningful change.

5. **Holistic Intervention:** Deming said, "A bad system will beat a good person every time!" As organisational health is at the heart of our thinking, we take a holistic view of organisations and systems. We work with our clients to prioritise the workforce interventions that address not only operational needs but also cultural and behavioural changes essential for sustainability. By addressing the full spectrum of organisational dynamics, we help build a healthier, higher performing workforce for long-term success.

6. **Legacy of Capability Building:** Our default approach is to build capability in every project, leaving a sustainable legacy that enables organisations to continue their workforce planning journey independently. Through tailored training and knowledge transfer, we ensure your team is equipped with the skills and insights needed for ongoing success.

Our Offers

Tricordant provide a range of planning interventions and consultancy bespoke to the client need. In all cases we make an initial assessment of the request to interpret and question the ask, to fully understand the situation and then agree a course of action to meet the need. Strategic workforce planning is not a perfect science and so we always seek to take a pragmatic course of action. Our offer for strategic workforce planning can be described under three broad categories:

1. A rapid health check of your strategic workforce planning and your organisations readiness for workforce transformation. The health check will consider the organisations strategy, culture, SWP process, skills, capacity, data management & analytics, governance and supporting technologies.
2. General consultancy on strategic workforce planning at place, pathway and or professional level, helping clients understand both their service and supply pipelines and building strategic plans that show the range of options that can arise as a result of the variables being assessed. We then support our clients in problem solving how to resolve gaps and time challenges, offering a range of interventions they might consider in mitigation.
3. A range of data management and data analytics services tailored to our clients very specific needs. Supporting the production of unit or organisational annual or multiple-year, workforce plans.
4. Guiding workforce development and transformation activities across the full range of professional and skills-based needs. We help guide clients to identify the skills they require and how they then build that skillset through the range of interventions available.

To learn more about our approach to Strategic Workforce Planning and how we can support you contact our Strategic Workforce Planning and Organisation Design Practice Lead Nick Richmond on nick.richmond@tricordant.com