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Primary Care Cluster Workforce Planning Template

Insert Cluster Name

Insert Date



Please note that when completing the template, the document will expand to accommodate the required information and data.

Cluster /Cluster group	
List of Practices within Cluster group who are included in the workforce plan and have contributed to its development	
Workforce plan development team:	
Supported By:	
Date Commenced:	
Date Submitted:	
Check and challenge amendments by:	
Date Signed Off:	

Workforce plan version control

Version number	Changes Made	Changes Made by	Date



Introduction to the template

This template has been designed to assist Primary Care Clusters develop a workforce plan. The twelve stages for developing the plan are outlined in the diagram below. By completing each of the activities within the 12 stages (sections within the template) a Cluster can develop a robust workforce plan to ensure primary care has the 'right people with the right skills in the right place at the right time, within an affordable budget to delivery safe sustainable primary care services'.

Primary Care Cluster Workforce Planning Approach

Getting started

1. Define the cluster plan based on policy direction

Where are you now?

2. Engaging stakeholders

3. Cluster population and health needs analysis

4. Service demand analysis and cluster trends

5. Understand the current workforce issues across the cluster

Where do you want to be?

6. Creating the shared vision across the cluster

7. Future workforce requirements

How are you going to get there?

8. Identifying workforce transformation opportunities

9. Exploring workforce supply and development routes

10. Gap analysis-current versus future workforce

11. Developing the cluster action plan

12. Governance and delivery

Associated Guidance Notes

Expanded guidance and notes on the development of a primary care Cluster workforce plan and completion of this template can be found in the associated document; Cluster Workforce Planning Guidance Notes

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1 Defining the Cluster Plan

1.1 Purpose: What's the rationale for the plan and who needs to be involved.

1.2 Scope: Define the scope of the plan and the decisions it will support.

1.3 Alignment: Consider the key policies, strategies and drivers for Primary Care in Wales and state how this plan aims to align with these.

2. Engaging Stakeholders

2.1 Ownership and Engagement: Who will own the Cluster workforce plan? Who needs to be involved both internally to the Cluster and externally?

2.2 Stakeholder Identification: Make a list of the key stakeholders and consider how they need to be engaged.



3. Cluster Population and Health Needs Analysis

3.1 Population: What are the key population factors that are influencing the services currently being used?

3.2 Health Needs Analysis: What are the key health needs that are influencing the services currently being used?

3.3 Insight: Are there any population or health trends that stand out locally? Does this information provide any insights into how services may need to change in response to any changes and trends emerging?

4. Service Demand Analysis - Cluster Trends

4.1 Current service overview: Provide a brief overview of the services you currently provide across the Cluster. Where are the pressure points?

4.2 Changes in demand: Are there any specific service demand trends across the Cluster? If so, what are they? Quantify the change in demand if possible. Can you identify any specific workforce skills/tasks and activities that are in high demand? Are there any seasonal peaks you are aware of that affect your workforce requirements?



5. Understanding Current Workforce Issues Across the Cluster

5.1 Workforce profile headlines: What are the key characteristics of the current workforce across the Cluster? Types of staff, FTE, headcount, age profile, gender and retirement profile, vacancies and leavers, skills mix, part time/full time split; Turnover, vacancies and attrition; Recruitment and retention issues; skills and skills shortages.¹

5.2 Key workforce challenges and issues: From the workforce profile headlines, can you identify the key workforce challenges and issues that need to be addressed in the workforce plan?

6 Creating the Shared Vision - Future shape of service

6.1 Shared Vision: What is the Cluster's shared vision? What are the benefits/goals of the Cluster vision? What are you trying to achieve through this workforce plan?

6.2 Options appraisal : Can you identify a preferred model to deliver the shared vision? Why? What's the rationale? Does it deliver the benefits more effectively than other options? Or is it simply more achievable?²

¹Use your workforce information from the WNWRS and anything that you consider using the Workforce Data Analysis Resource (primary care)

²Options appraisal - consider a number of potential options you could take, discuss/evaluate them and decide which is your preferred model and why



7. Future Workforce Requirements

7.1 Activity analysis: What are the key activities the workforce (activity analysis) will need to do in the new model? Can the activities be broken down into competences, skills and knowledge? How much activity is going to be needed? (consider your demand identified in stage 4)

7.2 Types and numbers of staff needed: Identify the types and numbers of staff required. Have the teams through which the service is to be delivered been identified?

8. Identifying Workforce Transformation Opportunities

8.1 Productivity: Have you considered how you could improve effectiveness? Describe the productivity implications you have considered.³

8.2 New roles and new ways of working: Have new ways of working been explored? Have new roles been identified as part of the workforce requirement? If so, which roles/ which ways of working? Why? What impact do you expect them to have?

³ **Productivity - achieving increased service activity for a given level of workforce input, or, achieving the same activity with a smaller level of workforce input without compromising quality**



9. Exploring Workforce Supply and Development Routes

9.1 Future workforce configuration considerations: Is the workforce configuration you are suggesting realistic, deliverable and affordable? What needs to change about the internal workforce (workforce you already have)? How can you create and bring in the new (and in some cases different) workforce you need?

9.2 Supply and development routes: What can you do to influence the future supply and development of the workforce so that it meets the requirement identified? Have you considered different supply routes? How have you incorporated succession planning?

10. Gap Analysis - Current verses future workforce

10.1 Undertake a gap analysis and consider how you might bridge gaps identified (solutions). Gaps in skills, knowledge and competence of current staff which require development, or demand for a different type of worker (new or extended roles). Gaps in terms of roles needed (between current and future workforce). Gaps in terms of patterns flexibility and ways of working.



11. Developing the Cluster Workforce Action Plan and Priorities

11.1 Develop a workforce planning action plan using SMART objectives: What are your workforce planning priorities? Who needs to do what, by when, identifying what resources are needed?

11.2 Supporting action planning: What are the most significant areas for workforce change? Can you cost these? What local education and training strategies support this plan (have you linked with the Primary Care Lead?) Has momentum been built in for changed mandated by GPs and senior staff? Is there ownership from key Stakeholders? Cluster staff, Local Health Board, financial resources identified? How will momentum for change be sustained?

Example action plan format headings (there are many variations of action plan formats)

Objective/ goals	Tasks	Resources	Responsible Person	Time	Evaluate and success identification
Specific, measurable, achievable, realistic, timely or time bound. ⁴	What activities needs to happen to achieve the objective (there may be many tasks to an objective - each with different resources etc.)	What resources are required?		By when to you need to achieve the task	How will you evaluate if you have achieved your goal successfully

⁴ **SMART objectives are goals that are Specific, Measurable, Achievable, Realistic and, Timely (or time-bound).**



12. Governance and Delivery

12.1 Implementation: What are the key milestones of your plan? How will progress against the plan be monitored? Are there any measures that can help you to monitor progress on implementing your workforce plan? e.g. new roles or skills sets having an impact on access, outcomes or patient satisfaction?

12.2 Measuring progress: How are the outcomes and unintended consequences going to be measured? Can you identify workforce risks and mitigation i.e. actions that can be taken to manage and reduce any potential risk?

12.3 Refreshing your plan and actions: What is the process for revisiting your plan and refreshing any requirements?

