**Resource 2**

**Workforce Planning Checklist**

Below is a checklist to help you get to a good starting point for your Workforce Planning process, looking around the Parameters, Engagement, Stakeholders, Context, Drivers. It is always advised to start small and grow from there.

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| Checklist | Questions to ask |
| Project Plan | * Do you have project planning tools and skills available to you? If so, these will be good to apply to workforce planning * This does not necessarily mean that you have to have formal training in project management – as long as you can plan, organise, set goals, objectives and milestones – you will be ok. |
| Parameters | * Have you defined the parameters of your project? * Who is it for? There are different ways to frame your workforce planning project. E.g. are you workforce planning around a particular age group? A specific care pathway? A geographical patch? A facility or building? It could be a combination of all or some of these of course. |
| Scope | * What is the scope? Which workforce(s) are you planning? Are you taking into account the workforce who might be employed within health and social care, or are you taking into account e.g. carers, volunteers, community champions and other organisations and agencies? |
| Timelines | * Have you thought about how far ahead you are looking? * E.g. 10 years in the future - how are you going to tie into service and financial planning? * Or is it something you need to do quickly over the next month or year? * Where do you expect to see changes in roles? * How far ahead into the future will your workforce plan be for? 1year? 2 years? 5 years? 10 years? * Are you engaged in “crisis” workforce planning – only planning for the next few months because of a very specific challenge or service issue that needs addressing by an immediate re-configuration of the workforce, or by embarking on some immediate recruitment? * When are you expected to have completed the workforce planning process and produced a workforce planning document which sets out a clear implementation plan. This is a good place to begin once you are thinking about how you will organise the workforce planning process |
| Your role | * What role will you take on in the workforce planning process? Are you a catalyst in workforce planning? Are you a change agent? Are you a facilitator? Are you a resource investigator? Do you have an overarching role of co-ordinating the process? * It’s important to remember that you are not doing it all! You are not the centre of workforce planning. It is important to pull in the right people at the right time to support a holistic process |