**Topic: Strategic Workforce Planning Process: A Regional Perspective**

**What is Strategic Workforce Planning (SWP)?**
A methodical process of analyzing the current workforce, determining future workforce needs, identifying the gap between the present and future, and implementing solutions so the organization can accomplish its mission, goals, and objectives.

**High Level Overview of Strategic Workforce Planning (8-stage process):**

1) Organization Strategy
2) Segmentation
3) Environmental Scan
4) Current State
5) Future State
6) Gap Analysis
7) Action Planning
8) Monitor and Report

**Organization Strategy**
Why it is important to begin with the organization’s strategy?
- The organization strategy paves the way for where the organization is going. It should drive the organization, its employees, and its operations
- It informs how you will accomplish your mission

How is your organization’s workforce linked to the strategy?
- Accomplishing your mission requires putting your strategy first and then developing a workforce to execute it

**Segmentation**
What is segmentation?
- The process of separating your organization’s workforce based on roles and functions

Do all roles contribute equally to strategy execution? Which is more? Which is less?
- All roles in your organization are important however some add more or less value and wealth than others
- Determination of which ones contribute more or less to the organization needs to be done during this stage. You are the experts regarding your organization. Answering the following question is key to the workforce planning process:
  “Which ones have the potential to accelerate achievement of the organization’s strategy?”

**Environmental Scan**
What is an environmental scan?
- A constant processing of quantitative and qualitative information of the internal and external organization environment impacting the workforce: employee profile, organization, labor market, rest of the world
- It is a decision framework that provides a pivotal view of the future and can occur at any point in the strategic workforce planning process
Current State
What is the value of the current state analysis?
- The Current State Analysis sets a foundation for the strategic workforce planning process and is a point of comparison for the gap analysis

Future State
What is the value of the future state analysis?
- Its primary goal is to develop foresight. Foresight allows you to make decisions that are based on well-developed information, scenarios, and planning
- It lead to a desired outcome for a specified (pivotal) role

Gap Analysis
What is a gap?
- The difference(s) between the Current State and the Targeted Future State; between supply and demand
What is gap analysis?
- The examining of the difference between the Current State and the Targeted Future State or the supply and demand

Action Planning
What is action planning?
- Steps or activities that must be taken for a plan to be successful
- It includes specific tasks that will be completed by specific individuals; a time management system that indicates when tasks will be completed; and resource allocation that includes funding for specific activities

Monitor and Report
What should be monitored and/or reported within your organization?
- Actions
- Measured data
- Agreed upon by your organization:
  - Measurements – Quantitative, Qualitative, What can we leverage from the organization?
  - Reporting frequency – How often should you monitor? Does it differ by variable? Who mines data?
Who analyzes? Who is it reported to and in what way?

Overview of Regional Strategic Workforce Planning

Knowing the Strategic Priorities for the Region
What’s Important to the Partners in this Regional Collaborative?
- Partners having knowledge of their own strategic plan and how that fits with a regional plan
- Engage partners in meaningful discussions
- Set strategic priorities and develop regional plan
- Form task force to address specific regional workforce needs with stakeholders
Data - Having Data is Good, but Having Good Data Is Desirous!
- Ensure accurate data is going into workforce tool
- Correct mapping of jobs from each project partner
- Automate data feed for timely upload
- Ensure accurate data is rolled up to region

Regional Workforce Portal Data Analysis
- Strategic jobs identified for benchmarking
- Analyze data on benchmark jobs
- Determine predicted gaps and diagnose root causes
  - Use of Gap Analysis

Understanding Emerging Business Strategies for Hospitals
- Know what expansion projects hospital are committed to
- Emerging roles/jobs that are new or increased demand due to strategies
- Effect on regional workforce pipeline
- Conduct environmental scan
- Combine with regional data analysis

Understanding Regional Demand
- Identify jobs with highest priority and critical to business strategies
- Emerging/New Jobs or Changing Jobs
- Key component of workforce planning

Closing the Gap in Supply/Demand
- Task Forces/Committees – hospitals and schools
- Determine best ways to close gap – new or redirected programs, etc.
- Plan for current and future needs – required certification, competencies, retraining and retention programs
- Stakeholders to Include: Hospitals, Education, Others

Identifying Other Overarching Workforce Metrics
- Other Critical Metrics may need to be addressed - diversified workforce, high turnover & vacancy, etc.
- Action plans developed to address identified needs
- Develop programs to address identified needs

Ongoing Review of Strategic Jobs and Metrics
- Continuous review and prioritizing of strategic jobs
- Annual review of regional workforce metrics
- Develop action plans to close gaps in strategic jobs and critical workforce metrics
- Develop in depth regional reports and annual regional workforce plan

Strategic Workforce Planning Resources
• Provide access to Strategic Workforce Planning Model Resources
• Engage partners and stakeholders in specific stages of workforce planning

DFWHC Regional Workforce Planning Collaborative

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• Continuous Feedback and Improvements from partners
• Other resources

Summary
• Hospital partners have a common understanding of strategic workforce planning and how they contribute to regional workforce planning
• Correct data at regional level is critical
• Understanding by hospital partners of their organization business strategies affecting workforce is key to inform future demand
• Continuous review of strategic jobs and metrics by partners and stakeholders
• Continuous dialogue with the regional workforce planning collaborative to develop a regional workforce plan
• Ultimately have the right talents in the right jobs with the right competencies at the right time for the right cost

References:
Human Capital Institute, Strategic Workforce Planning Model, www.hci.org