

HR Employment Policy & Procedures

Workforce Planning Strategy & Framework

Implementation Date: December 2022

The behaviours outlined in the ACHIEVE Framework should be reflected in the application of this Policy.





Document Management - Version Control

Policy Title & Reference	Workforce Planning Strategy & Framework	HRP/066	
Version Number & Date	3.0	20 th December 2022	
Title, Version Number & Date of Superseded Version (if applicable)	Workforce Planning Strategy & Framework	Version 1.0 2.0	November 2013 7 th June 2016
Rationale for introduction/Driver for change	Review of the existing Framework to place in context of current strategic focus on workforce planning, improving medium to long-term planning and action plan implementation in line with the People First Strategy.		
Summary of Substantive Changes (if applicable)	Review of Framework document to reflect the strategic links of workforce planning to Council plans and strategies including The People First Strategy. To incorporate the tools and information guidance for workforce planning into a separate toolkit to support managers to undertake effective workforce planning which can be developed and built upon over the 5 year period to meet need.		
Summary of Technical Changes (if applicable)	<p>This document is a re-write on the current Workforce Planning Framework retaining its main principles.</p> <p>Amendment of title to reflect the content of the document in that it sets out a 5 year strategy and framework;</p> <ul style="list-style-type: none"> • Strategic link to named Council Strategies in setting workforce planning in context; • Inclusion of the 4 Workforce Planning Priorities to support Service level workforce plans and aims; • High level 5 year considerations for workforce planning linked to The People First Strategy incorporated; 		

	<ul style="list-style-type: none"> • Review of framework and processes including roles and consultation; • Review of governance framework to 6-stage workforce planning model based on Chartered Institute of Personnel & Development in line with best practice. • Removal of workforce planning tools and 'how to' guidance which will be formulated into a manager's toolkit to clarify and simplify information. 	
Lead Officer	Lisa MacGregor, People & Change Partner	
Final Trades Union Position	Notification of Agreement from Unison, Unite & GMB	
Consultation & Approval Process	<i>Committee</i>	<i>Date</i>
	Convenors	29/11/22 Trade Unions and Chief Officers (and their management teams)
	JCF (if applicable)	N/A
	C. S. Committee (if applicable)	1/2/23
Accompanying Documentation (incl. EIA)	Equality Impact Assessment No 594	
Linked Policy, Schemes and Procedures	Workforce Planning Guidance Toolkit Council Strategic Plan Service Delivery Plans The People First Strategy Equalities Action Plan	

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1. Introduction

1.1. This Strategy and Framework details West Dunbartonshire Council's approach to strategic workforce planning 2022 – 2027 in line with Strategic Council Plans, is based on a review of existing good practice, and best practice guides. A Workforce Planning Guidance Toolkit for Managers, providing the tools and supporting information to undertake effective workforce planning accompanies this Strategy and Framework.

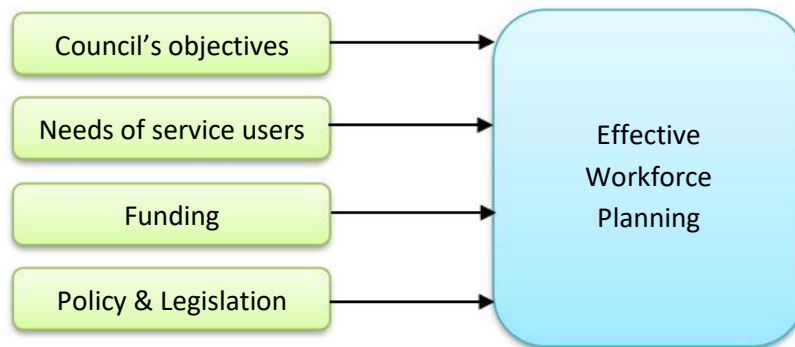
1.2. Strategic workforce planning is proactive and seeks to enable the delivery of strategic objectives by identifying and implementing strategies. Effective workforce planning is when a strategy is brought to life so vividly that a workforce can be constructed around it.



2. Workforce Planning Context

2.1. Effective workforce planning will be informed by:

- The Council's current and future objectives;
- The needs of our service users;
- The amount and sources of funding available; and
- The wider policy and legislative environment in which the Council operates.



2.2. The Council's [Strategic Plan \(2022–27\)](#) informs the development of our Service Delivery Plans reflecting the themes and priorities within. The People First Strategy 2022 – 27 ([link](#)) sets out the Council wide 'people' route to support delivery of the Council's Strategic Plan incorporating the key priorities below which will work in collaboration to build the workforce for the Council:

- Supporting & Building Workforce Skills
- Digitalisation
- Employee Wellbeing
- Workforce Planning
- Employee Engagement



2.3. The People First Strategy 2022–27 will concentrate on the Employee Life Cycle as the foundation for constructing the workforce required to meet the Council's Strategic Objectives and support the Workforce Planning agenda with a different focus each year:

- year 1 – Recruitment
- year 2 – On-boarding
- year 3 – Development
- year 4 – Retention
- year 5 - Employee Recognition & Off-boarding

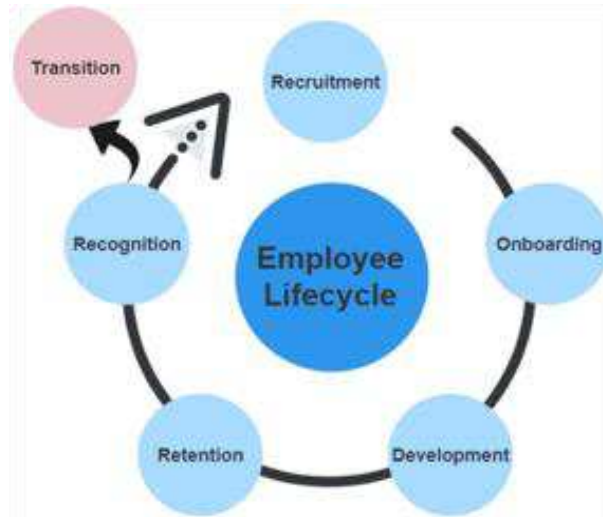


Figure 1: The employee life cycle

- 2.4.** Workforce planning takes place at a Council-wide level looking at system-wide issues and strategies to support the Council’s strategic plan. It aims to address external workforce factors that affect the entire organisation, maintain organisational capacity and to mitigate risk exposure. Workforce planning at this level is undertaken with the Strategic Leadership Group and is facilitated by the Strategic Human Resources Team. During this process it may be that the workforce planning process in a Chief Officer area highlights additional system-wide issues not previously identified. As an intuitive process, it is therefore important that resulting Council-wide action plans are responsive to any such need highlighted by the Service workforce planning process.
- 2.5.** Workforce planning is also undertaken at Service level and is embedded in the service planning process with workforce planning forming part of the Service delivery plans. This ensures clear linkages between service workforce plans reflecting service priorities, supporting the achievement of the council priorities whilst taking cognisance of the priorities within the People First Strategy. Service workforce plans outline the actions to ensure that we have the workforce required to deliver new, different and improved services in challenging times.



- 2.6.** It is important to note the two-way process which needs to exist in terms of how the People First Strategy (at Council wide level) and Workforce Plans at strategic service level) will work together to ensure that service, financial and workforce plans are integrated ensuring a resourced workforce is in place to meet organisational needs.
- 2.7** In considering workforce planning in context it is important to also acknowledge that our current strengths particularly surrounding the People First Strategy priorities provide us with the foundations and platform from which to build and meet our challenges ‘head on’. Therefore, they must continue to be recognised, developed, promoted and leveraged as we work together with our stakeholders and partners to deliver improvements within the Framework of the Priorities.

Our Key Strengths:

- Employee Wellbeing Strategies including wellbeing champions and policy base
- Flexible Working – Award winning in relation to our work styles & hours
- Employee Engagement Strategies –Use of Trickle, particularly for the frontline employee voice
- Learning & Development Opportunities including Digital champions network and skills passports to support career development
- Fit for Future Review process as a basis for effective service re-design with a user based focus
- Use of Technology to progress service delivery and enable remote/hybrid working
- Skills Development & Retention - Succession rates in recruiting and retaining Modern Apprentices & Graduates
- Workforce Planning Console - Real time Workforce planning data for Managers providing ‘snap shot’ data and trends analysis in relation to the workforce
- Knowledge and Experience of our current Workforce

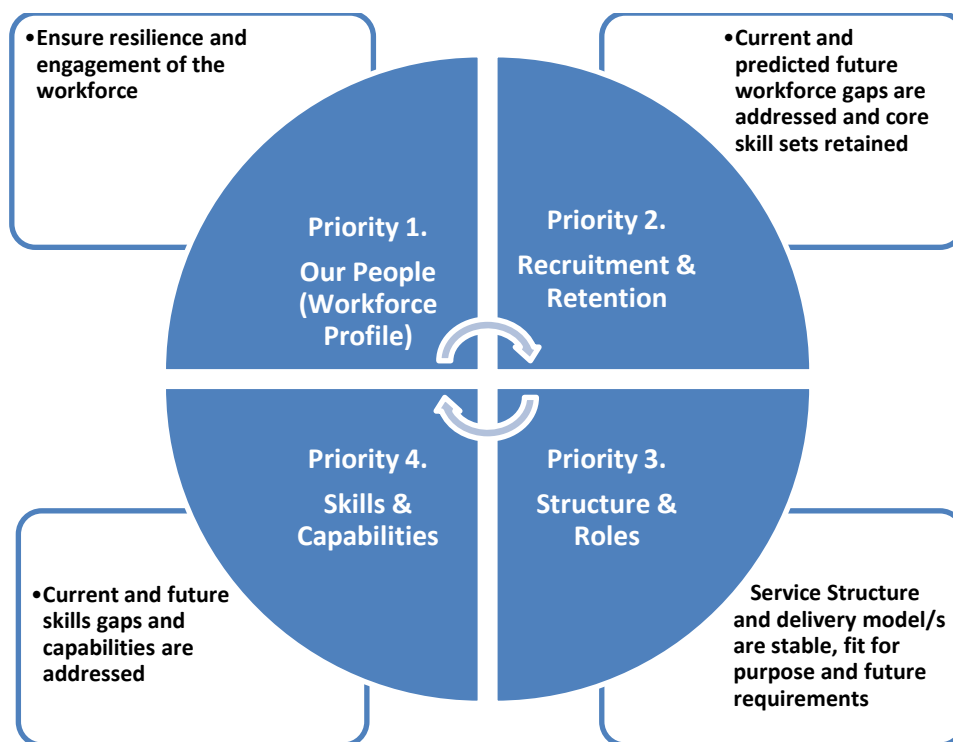
2.8. It is anticipated the implementation of the People First Strategy and its associated 5 year plan alongside the workforce planning processes at Service Level will highlight a number of challenges, which we will need to address to ensure our workforce is fit for purpose to deliver our Services. In line with the Council's Strategic Plan we understand the challenges that will also be reflected and considered within the workforce planning context.

Our Challenges:

- Aging and forecasted decrease in population in the West Dunbartonshire area reflecting in our workforce
- Poverty and health within our communities impacting on potential workforce and current employee wellbeing
- Current and anticipated future budget position impacting on structures and roles and predicted recession
- Competitive external labour market for key skills versus vulnerability of key employment sectors in our communities particularly following EU Exit and the Pandemic including the Impact on youth employment
- Known skill shortages in key areas
- Continuous Skill development of the workforce including Digitisation and Transformational change
- Equalities & removing barriers – Building a workforce representative of our Communities
- Environmental factors & climate change influencing the way we design and deliver our services

3. Workforce Planning Priorities

3.1. In order to address our workforce planning needs Service Level workforce plans and their actions will be developed around our 4 Workforce Planning Priorities. These priorities reflect the strategies and aims of this Workforce Planning Strategy Framework, to ensure we are able to respond accordingly to our challenges whilst building on our current good practice and successes from our journey so far.



Priority 1. Our People (Workforce Profile):

Ensure resilience and engagement of the workforce

Strategy:

Develop and implement wellbeing, employee engagement, equality and learning and development plans to enable capabilities, improve resilience and promotion of a diverse workforce

We will know we have achieved this:

When our employee engagement strategies and processes reflect a workforce that feels valued, attendance levels and employee wellbeing is improved and employees are engaging in continuous development whilst meeting service delivery objectives. Our workforce planning data meets the on-going requirements to provide the insights required to build the workforce we require which reflects our communities.

We will monitor this through:

Our employees surveys and engagement platforms such as Trickle, absence levels and other key sources of information relating to wellbeing such as stress risk assessments and related performance indicators at Council wide and service level. Our workforce planning console will support this monitoring of employee data along with external data sources in relation to our communities and labour markets.

Priority 2. Recruitment & Retention:

Current and predicted future workforce gaps are addressed and core skill sets retained

Strategy:

Develop and implement employee life cycle plans in line with the People First Strategy to attract and retain the workforce

We will know we have achieved these:

When turnover is minimised and we are able to fill our hard to recruit posts where we have identified skills shortages, including established talent pool pipelines where needed, both internal and external from which to source key talent from.

We will monitor this through:

Reviewing the levels and reasons for turnover through our exit processes and taking appropriate action, monitoring key recruitment data and trends to support the improvement of processes, roles and structures and policy base. Monitor actions implemented against required outcomes through the workforce planning process.

Priority 3. Structure & Roles:

Service structures and delivery model/s are stable, fit for purpose and future requirements

Strategy:

Implement service review process including role design, use of new technology and new ways of working to add resilience, address gaps and establish opportunities for efficiencies

We will know we have achieved these when:

We have flexible and resilient structures with our workforce facilitating the achievement of service delivery requirements through the use of new technologies and digital transformation.

We will monitor this through:

Working with Services within the workforce planning framework to monitor workforce planning actions in the context of their impact to support the achievement of service delivery objectives and improved performance indicators. Monitoring of structure and employee data will be supported through the workforce planning console.

Priority 4. Skills & Capabilities:

Current and future skills gaps and capabilities are addressed

Strategy:

Develop and implement learning and development plans and development opportunities to improve capabilities and resilience within the workforce

We will know we have achieved these when:

Learning and development opportunities are effectively scoped and implemented based on the requirements of the Service and effective succession planning in place to ensure skills gaps are closed effectively.

We will monitor this through:

Monitoring data in relation to learning and development opportunities undertaken, particularly in relation to digital skills and ensuring essential learning and development is embedded in skills passports. Monitoring the internal labour market information in relation to those moving internally and undertaking secondments, promotions etc. as well as exit information to understand key reasons for leaving. Within the workforce planning framework ensuring succession planning is a key consideration and monitoring outcomes of service workforce plans against objectives set.

- 3.2.** Through Workforce Planning we aim to build workforce skills and support for the future across all services through innovative development programmes and bespoke interventions. Workforce planning will support with the design and support of modernised services and digital transformation, building resilience to Council Services and support progression the Council's equality outcomes (<https://www.west-dunbarton.gov.uk/media/4320212/equalities-report-final.pdf>).
- 3.3.** As part of the People First Strategy a 4 year equalities action plan (Appendix 1) is being actioned which will influence all 4 Workforce Planning priorities, therefore findings and outputs from this plan will be considered across the 4 workforce planning priorities.
- 3.4.** Workforce planning is one of the key priorities of the People First Strategy. In order to build and improve the Council's workforce planning capabilities and further support service level workforce planning activity, development work in relation to workforce planning will also focus around the Employee Life cycle of the People First Strategy over the next 5 years.
- 3.5.** As work progresses in relation to the People First Strategy it is expected that specific strategies and actions will be reflected within the 4 workforce planning priorities and in turn these reflected in Service level workforce plans. It is important to ensure feedback from service level workforce planning also informs the People First Strategy.
- 3.6.** It is anticipated at this stage that development work will focus on the following areas reflected in the tables below, however as the People First Strategy progresses year on year focus may change as we respond to the outcomes and requirements.

Year 1 – Attraction & Recruitment

Spotlight on:

- Skills and recruitment gaps forecast and identified and workforce plans reflect how gaps can be filled;
- Support Services to review job quality, role profiles and recruitment practices for improvement;
- Talent pool development;
- Targeted attraction and recruitment (including increasing diversification of the Workforce);
- Consideration of promotion opportunities for Careers within the council;
- Review the Internal job market – consider succession planning, secondments and redeployment potential ensuring effective use of the Switch Policy.

Year 2 – Onboarding

Spotlight on:

- Development of Workforce Planning Console to incorporate employee data improvements relating to recruitment & on-boarding;
- Better use of Scenario Planning;
- Support promotion of human centered management;
- Increasing use of equalities information to inform decision making in relation to Workforce Planning.

Year 3 – Development

Spotlight on:

- Development of key Career Pathways;
- Succession planning with improved links to development opportunities and Leadership Development;
- Further development of internal talent pools;
- Promotion of personal and professional development through the Workforce Planning channels;
- Workforce Planning Policy, Strategy and processes informed by data and adapted accordingly.

Year 4 – Retention

Spotlight on:

- Improved use of Be the Best (and other conversations) with an emphasis on quality of information to inform workforce planning for a focus on skills development, individual career aspirations and future requirements;
- Links to employee retention and development data to enhance scenario planning and impact on team and structures;
- Build and promote coaching & mentoring opportunities into workforce planning strategies;
- Support to build digital and data skills as integrated actions of workforce plans;
- Improved use of market analytics to inform areas of risk for retention;
- Continued improvement to link workforce planning actions to the Strategic direction of the organisation and culture of change for continuous improvement;
- Further develop workforce analytics in relation to turnover to predict areas of risk and inform of strategies to retain.

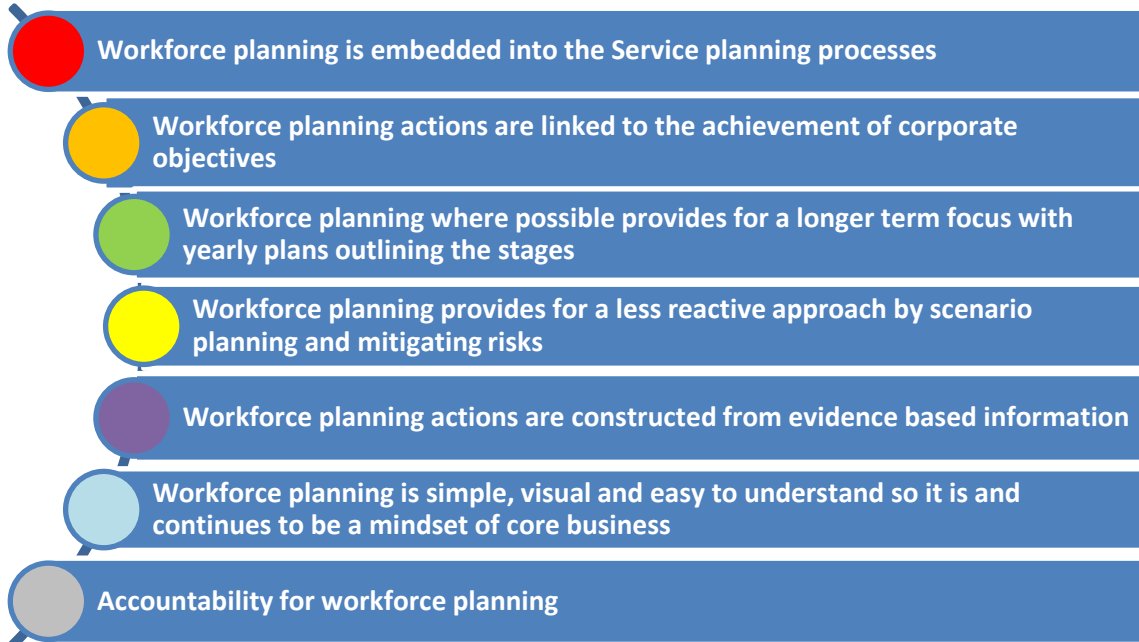
Year 5 – Recognition & Off Boarding

Spotlight on

- Consider promotional opportunities at Service Level as positive place to work informed by data analysis;
- Develop and further analyse exit interview information and destinations of leavers to inform workforce planning actions including role/structure design and development opportunities;
- Benchmarking scoped for actions relating to retention;
- Support methodologies to encourage returners for those who leave to develop career in another organisation.

4. Workforce Planning Process

- 4.1. Building on the foundations of good practice with the aim to continuously improve and ensure resources are directed in accordance with agreed policy and priorities and with data informed decision making we will look to ensure:



- 4.2. A best practice workforce planning approach has been adopted which brings a consistent format that can be used across Services and importantly is based on an evidence-based approach Workforce planning will involve the following key stages:



Stage 1: Understanding the Organisation & its Environment

Stage 2: Analyse the Current & Potential Workforce

Stage 3: Determine Future Workforce Needs:

Stage 4: Identify Workforce Gaps against future needs

Stage 5: Actions to address skill shortages, surpluses or skill Mis-matches

Stage 6: Monitoring and evaluate actions

- 4.3.** Further Information in relation to these stages is outlined in Appendix 2 and tools to support with the stages of the workforce planning process can be found in the Workforce Planning Guidance Toolkit.

5. Workforce Planning Governance

- 5.1.** Workforce planning at Chief Officer Level involves the Chief Officer and their management teams, facilitated by People and Change Partners as part of service planning and design processes. This process will involve the development and implementation of Service level workforce plans developed around the 4 workforce planning priorities (as outlined in 3.1) and informed by The People First Strategy. These plans will also respond to workforce factors that impact each area and therefore services will build and implement workforce plans which are reflective of the above and the needs of their service.
- 5.2.** West Dunbartonshire Health & Social Care Partnership is statutorily required to produce a 3-year Strategic Plan. A corresponding 3-year Workforce & Organisational Development Strategy is produced and it is delivered through a series of annual support plans approved by the Integrated Joint Board. Whilst separate planning processes exist, it will still be important to ensure that there is appropriate linkage with the Council-wide Workforce Plan and resulting action plans in so far as they relate specifically to Council employees working within HSCP.
- 5.3.** A longer-term approach to workforce planning is required with Council-wide and Service Delivery plans aligned to the 5-year period covered by the Council's Strategic Plan.
- 5.4.** In developing Service Workforce Plans a variety of information should be considered including the Council Strategic Plan, Service Delivery Plans, Service budget information, workforce profile, trend analysis and Service performance data/Indicators. A comprehensive list is included in the Workforce Planning and Guidance Toolkit.
- 5.5.** It is important that People & Change Partners are involved in the wider planning process in order to consider the workforce implications of Service Workforce plans at the earliest stage. People & Change Partners will also influence content

of plans by drawing attention to ways in which service structures, role redesign and employees can be developed and deployed more effectively to further the achievement of organisational or service-specific goals.

- 5.6.** Workforce planning involves every Chief Officer. It requires the vision, knowledge and experience of senior management, along with support and expertise from other relevant functions also such as finance for resourcing/funding requirements, legal and IT where required.
- 5.7.** Whilst the decision-makers in relation to workforce planning are as described above, it is important to also involve wider key stakeholders in the process, including employees and trades unions.
- 5.8.** Ownership of and accountability for workforce planning will be critical in ensuring that workforce plans are effective in meeting the Council's workforce planning needs. The roles of those involved have therefore been outlined as follows:

- **Elected members and the Chief Executive will:**
 - Set the strategic direction and ensure workforce plans are delivered.

- **Chief Officers and Service Managers will:**
 - Identify the internal and external factors which may affect the future operation of the Council and its ability to achieve its corporate objectives;
 - Develop the strategies to deal with any issues and gaps that are identified; and
 - Regularly review progress against the plan, identifying risks and report on these, as needed.

- **People & Change will:**
 - Facilitate the development of the workforce plan through employee engagement and by providing information to help develop the plan;
 - Work with Chief Officers to ensure that business requirements are adequately provisioned;
 - Support implementation of the workforce plans through quarterly monitoring;
 - Ensure the requirements of the People First Strategy informs Service workforce plans and facilitate communication processes.

- **Employees and Trades Unions will:**
 - Engage in consultation and feedback accordingly in relation to workforce plans to ensure plans and actions are appropriately informed, acceptable and workable.

- 5.9.** Service workforce plans will be entered, monitored and reported through the Council's performance management system (Pentana) to ensure key targets and actions are met.
- 5.10.** The Workforce planning process should be undertaken and resulting draft service workforce plans will be subject to formal consultation via the Joint Consultative Forum and Joint Consultative Committees prior to being submitted to the relevant Council Committee for final approval. Thereafter, service workforce plans will be subject to on-going monitoring and evaluation to ensure that they are effective in delivering required outcomes and are responsive to any changes in circumstances which subsequently arise.
- 5.11.** Resulting workforce plan update reports will be provided through the above consultation and approval process on an annual basis with a mid-year report provided in line with Service delivery plan reporting, outlining progress to date and details of the action plans to be progressed.

Appendix 1: Equality Action Plan

Planned Action/Objectives	Rationale	Timescale
Data and systems		
Input data from talentlink at recruitment stage.	Better Equalities data rather than gathering this information from HR21	Apr-21
Update equality questions to reflect talentlink (the portal used for recruitment)	Easier comparative with other councils	Nov-21
Review reasons for rejection of candidates on talentlink & Review of recruitment procedures	To ensure reasons are clear and measurable	Mar 23
Manual verification exercise in services that have no dedicated computer access/front line workers	To gather and improve Equalities data currently not held	Mar 23
Recording flexible working and career break applications and uptake of these	Transparency to see uptake and reasons for refusal	May-23
Communication		
Campaign for “why we need your equalities data”	Increased understanding of what data is used for	Mar-23
Equalities message on background screen – encouraging inclusive be heard be counted (part of campaign to encourage individuals to disclose Equalities info)	To increase awareness of the campaign	Dec-21
Establish Equality Forum/ideas Board	To generate ideas and spread the word	Mar-22
Celebrating diversity calendar	Raising awareness	Dec-22
Incorporating lived experience of our employees - share experience of their culture and events	Raising awareness	Mar-23

Equalities embedded as a standing item on agendas i.e. Senior Management Team and individual service Joint Consultative Committee meetings.	Starting conversations about diversity and a forum for information exchange	Mar-23
Review of job adverts/talent link re Diversity and inclusion. Further Progress Disability Confident status	Reviewing Job Adverts to ensure that we advertise as being a diverse organisation	Mar 23
Improved integration between workforce planning, recruitment and training	A more joined up and successful approach to recruitment, retention and workforce planning	Mar-23
Introducing Equalities into induction/be the best conversations	Embedding Equalities and discussing organisational values as part of be the best framework	Mar-23
Review the dedicated page for Equalities on the intranet.	To raise awareness and bring to the forefront	Mar-24
Equalities events with links local organisations sponsoring these events	Increased awareness	Mar-24
Wellbeing champions	Raising awareness and improve communication and generating ideas	Mar-24
Training and development		
Ensure Equalities training is mandatory and that refresher training is carried out every 2 years	Increasing knowledge around Equalities	Mar-22
Recruitment training for managers	Mandatory training to educate managers	2022/23
Before being on a recruitment panel everyone on that panel must have training on Equalities	Training on Diversity & Inclusion before recruitment	Mar-23
Equality & Diversity questions asked at interview	Other organisations show this to be an integral part of the organisation	Mar-23

Developing a better process for reviewing exit questionnaires and taking any forward relating to Equalities	Important to understand reasons for leaving	Mar-23
Review of recruitment process to ensure there are no barriers	Improving candidate experience	Mar-23
Training to be accompanied by Equalities recording form. Data in terms of numbers is captured. We now need to review all protected groups have access to training	To allow us to see who has attended training from an Equalities perspective. Data in terms of numbers is captured.	Apr-24
Train managers how to have conversations about diversity and inclusion – make this part of the Managers Induction and ensure it is refreshed every 2 years through an eLearning module	Educating the workforce for a better understanding	Apr-24
Diversity training roll out (mandatory course) including specific training relating to recruitment. Add to managers induction section of Equalities “bringing whole self” and best self to work encouraging inclusive practices	Educate leaders and give them responsibility for change	Apr-24
Including Equalities in our management/leadership training programmes	Tailored Equalities/inclusive management training	Apr-24
Investigate whether HR21 can record training as well as development for individuals and if not look at a way of doing this	Better data on training and development	Apr-24
Equally Safe at Work		

Equally Safe at Work	To attain the ESAW accreditation at Development Level and to improve organisational knowledge and culture in relation to violence against women and girls and how this impacts on workplace inequality	Aug-23
Policies and Procedures		
Recruitment of ex-offenders guidance /policy	Improving candidate experience	Mar-24
Neurodiversity policy	Important for increasing understanding on neurodiversity and being an inclusive and Disability Confident employer	May-23
Violence Against Women & Girls/Domestic Abuse Policy	Policy Review	Mar-23
Transgender guidance	Important for increasing understanding of trans individuals and being an inclusive employer	Mar-24
Promote zero tolerance approach to racism/challenging inappropriate behaviours	We have a zero tolerance approach to domestic abuse to this would bring other characteristics in line with this	Mar-24
Equalities in Employment Policy	Review to ensure fit for future. Created a Respect at Work Policy and Toolkit. Moving towards a framework in the future	Mar-23

Appendix 2: The Workforce Planning Process

Stage 1: Understanding the Organisation & its Environment:

This stage involves identifying and understanding the internal and external factors, which may affect the organisation, both now and in the future, and therefore considering how these may inform the likely future of the Council and, consequently, its workforce.

Whilst this stage is undertaken at Council level when developing the Council's Strategic Plan, further analysis is required at Service level as part of the service level planning processes and subsequent workforce planning to consider the workforce implications of factors identified during that earlier analysis, as well as to consider any additional factors specifically relating to the workforce not already identified. The Workforce Planning Guidance Toolkit provides for further methods to undertake this process.

Stage 2: Analyse the Current & Potential Workforce:

This stage involves reviewing internal & external labour market information and analysing the key workforce groups to understand their purpose and ability.

This will be facilitated by using the Workforce Planning Console to support with real time, snap shot and trend analysis data to inform. Other sources of employee data will also add value including learning and development records, employee surveys etc.

Stage 3: Determine Future Workforce Needs:

This stage involves estimating what the workforce needs to look like in terms of structure, numbers and types of employees likely to be needed by the organisation in the future to meet service delivery priorities. This should inform some of the service design in relation to considering the skills, knowledge and competencies required to deliver.

Stage 4: Identify Workforce Gaps against future needs:

This stage involves identification of any critical gaps between current workforce availability and future workforce forecasted demand and consideration of requirements to resource.

Stage 5: Actions to address skill shortages, surpluses or skill mismatches:

This stage involves the identification of action plans to address any identified gaps, in effect the formulation of workforce plans with Chief Officers to reflect the needs of Service Delivery Plans building capability and resilience.

Stage 6: Monitoring and evaluate actions

This stage involves monitoring the implementation of workforce action plans and evaluating their effectiveness in supporting future workforce requirements, as well as ensuring that they are responsive to any unanticipated developments, which impact earlier workforce planning assumptions.

This stage is a continuous process and will be undertaken with People & Change Partners on a quarterly basis to monitor progress ensuring workforce plans can be adjusted accordingly if they are not having the desired impact or circumstances change. It is also important to capture any learning resulting from monitoring and evaluation, in order to understand how effective the workforce planning process is and inform future areas for improvement.

The Workforce Planning Guidance Toolkit provides for further methods to undertake this process.