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Introduction

This document reports on the February 2014 Work Package 6 workshop and records the agreed actions. It is provided as a record to partners and can be read in conjunction with the workshop presentation slides.

The aims of the workshop were as follows:

- Day 1 – Validation of the comparison of qualitative methods in health workforce planning based on information provided by partners *(related to D061 User Guidelines on how to use qualitative methodologies to estimate future health workforce needs)*
- Day 2 – To train partners to conduct Horizon Scanning interviews with key stakeholders to enable the identification of drivers that may impact on the health workforce *(related to D062 Report on Future Skills and Competencies)*
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The workshop was held at the Department for Health, Richmond House, London on the 10th and 11th of February 2014. The workshop was well attended by a broad range of partners from across the Joint Action project **(see APPENDIX 1 for attendees).**

Day 1: Monday 10th February 2014

Time	Activity
10:00-11:15	Welcomes and introductions
11:15-11:40	Networking session
11:40-12:00	Qualitative methods in health workforce planning
12:00-13:00	Presentations
13:00-14:00	Lunch
14:00-15:00	Presentations
15:00-15:15	Coffee break
15:15-16:30	Comparison of qualitative methods in health workforce planning
16:30-17:00	Discussion on what is required of the toolkit and the user guidelines
17:00-18:00	Joint Action meetings and work package discussions
18:30-21:00	Activity Dinner

1. Welcome and Introductions

Greg Allen, interim Managing Director of the Centre for Workforce Intelligence (CfWI) opened the day and keynote speeches were delivered by Dr Dan Poulter MP, the Parliamentary Under Secretary of State at the Department of Health (in the afternoon session) and Professor Ian Cumming OBE, the Chief Executive of Health Education England (HEE). Caroline Hager, DG Health and Consumers, European Commission and Michel Van Hoegaerden, Programme Manager for the Joint Action also provided opening speeches. In addition Jamie Rentoul, Director of Workforce Strategy provided thoughts and welcomes on behalf of the Department of Health.

2. Qualitative methods in health workforce planning

Matt Edwards (WP6 leader) and John Fellows (WP6 content lead) opened the session by presenting to partners on WP6's progress to date and the steps that will be taken following the workshop to ensure high quality deliverables to the Joint Action project.

Next the presentation focused on the CfWI's methodology using qualitative methods in workforce planning, including which data is used and how that data is then analyzed to better inform decisions. This also included the types of question these methods seek to answer, reflections on how these methods could be used by partners and what practical tools and guidelines WP6 should consider developing.

3. Presentations

Presentations were then delivered by two WP6 partners on their use of qualitative workforce planning in their own countries. Victor Slentor, from the Netherlands, discussed the 'participative policy agreement' approach and also included an interesting video about the use of technology in healthcare from 'Scanadu'. Reka Kovacs from Hungary, discussed the potential application of qualitative methods in the future and some of the practical steps that would be needed to apply qualitative methods.

4. Comparison of qualitative methods in health workforce planning

John Fellows presented a session on the identification and classification of qualitative methods used by partners in health workforce planning and forecasting. This session focused on the comparison document which was created by WP6 using the templates completed by partners about their current methods of qualitative workforce planning. The presentation focused on the inputs received from partners and the methods used to group the methods into categories.

Key Discussion Points:

- The inclusion of the benefits and risks of each method would be helpful to workforce planners and decision makers
- An indication of the resources needed for each method and, if possible, an estimation of cost would be useful

5. Discussion on what is required of the toolkit and the user guidelines

Matt Edwards presented the next session, which focused on objective 4 of the Joint Action:

Objective 4	Description
Guidelines on qualitative HWF planning methodology and increased qualitative planning capacity.	Identification and classification of the various methodologies used to do qualitative HWF planning across MSs and to create user guidelines outlining the methodologies used. Experience its effectiveness in at least 1 country.

The objective of the session focused on identifying the aims and contents of **the user guidelines** and **the practical tools** that the user guidelines could contain in order for WP6 to deliver "*DO61: User guidelines on how to use qualitative methodologies to estimate future health workforce needs*"

To meet the objectives of the session, the workshop was split into two sub-groups to discuss the user guidelines and the tools separately. The groups were reminded that the session's purpose was to listen, discuss and agree requirements with each other. The aim was to produce a baseline of proposed content with members being asked to ensure that these guidelines must be realistic and sustainable, relating to WP7's work.

Group 1 (facilitated by Matt Edwards) was asked to discuss the User Guidelines and asked to consider:

- What guidelines are required?
- Should basic / advance methods be recommended?
- How can we ensure that guidelines are realistic / sustainable and updated?

Group 1 – User Guidelines	
Alessia Clocchiatti	Mercedes de Jorge
Baiju A. Khanchandani	Paolo Michelutti
Edit Eke	Ragnar Gullstrand
Frédéric Destrebecq	Sara Roda
Isabella Notarangelo	Sarada Das
Lieve Jorens	Spyridon Kokkinis
Matthew Hamilton	Veerle Vivet
Melanie Boeckmann	Zoltan Aszalos

Key Discussion Points

Structure:

- Creation of guidelines to reflect different user levels
- Creation of a decision tree and inventory to help decide users which methods to use
- Structure to be a step by step guide, to not to overload users
- A sub group to be consulted during development

Content:

- Include resource implication and benefit analysis of tools
- Reflect that not all methods are needed, guidelines purpose is to help select appropriately
- Inclusion of list of sources, experts, topics and questions
- Indication to users when they can start using these methods
- The need to encourage users to look past their own borders
- Include the benefits of guidelines to countries with examples of usage

Group 2 (facilitated by John Fellows) was asked to discuss the Tool Kit and asked to consider:

- What tools are required?
- Basic / advanced tools?
- How will they be updated?
- What is required to support the toolkit?

Group 2 – Toolkit	
Dr Alexandra Skitsou	Dr Konstanty Radziwill
Greg Allen	Michel Van Hoegaerden
Anna Björg Aradóttir	Miloslava Kovacova
Caroline Hager	Pascale Steinberg
Professor Domingo Orozco	Reka Kovacs
Dora Kostadinova	Roisin Morris
Eszter Kovacs	Victor Slenter
Giovanni Leonardi	Zuzana Matlonova

Key Discussion Points:

Needs for the Toolkit

- A regional consultancy group to be formed
- Creation of knowledge database
- Monitoring questionnaires to assess the results of policies
- Process & tools to enhance integration and alignment
- Written submissions to follow from Michel, Victor and Zuzana - these will be examined and considered as part of toolkit development by WP6.

Toolkit
- Stakeholder analysis
- Methods to engage people
- Translation tool from qualitative to quantitative
- Standardisation, behavioural science, first tools
- Feedback process, on tool and to professionals

Action: **WP6 team to develop this feedback with a subgroup to put forward a proposal to all WP6 partners (a web survey during March 2014).**

6. Validation of the comparison of qualitative methods

The final session of the day was chaired by Matt Edwards and John Fellows. The purpose of this session was to validate the comparison document, which is a deliverable in "*DO61: User guidelines on how to use qualitative methodologies to estimate future health workforce needs*".

Members were asked in the session to confirm they agreed with the methodology by which WP6 had created the comparison document. Partners were reminded this was a baseline from which further activity on the user guidelines would be developed.

Discussion:

All members of the group agreed to validate the document with the exception of Michel Van Hoegarden and Victor Slenter, who had specific additional points that would help enhance the document.

Action: **WP6 team to work with the above partners to respond to their specific points and upload the updated comparison document to Sharepoint (during March 2014).**

Day 2: Tuesday 11th February

Time	Activity
09:00 - 09:30	Welcomes & recap of day 1
09:30 – 10:00	Work Package 6 activity to date
10:00 – 10:30	What is horizon scanning and how will it be applied for this Joint Action
10:30 – 11:00	Discussion on horizon scanning proposals
11:00 – 11:20	Coffee break
11:20 – 13:00	Workshop training: Horizon scanning - semi-structured interviews
13:00 – 14:00	Lunch
14:00 – 14:20	Reflections on horizon scanning - semi-structured interviews
14:20 – 15:15	Discussion on the skills and competencies of EU nursing workforce
15:15 – 15:30	Coffee break
15:30 – 15:45	Revisiting the horizon scanning proposals and agree next steps
15:45 – 16:00	Close

7. Welcomes and recap of Day 1

Matt Edwards opened the day with a recap of Day 1 activities and the overall objectives and purpose of the workshops.

8. WP6 Activity to date

John Fellows and Matt Edwards presented a session on WP6's current activity to date relating to the deliverable *D062 Report on Future Skills and Competencies.* Inputs from partners included their feedback on the literature review which looked to identify megatrends and challenges and opportunities surrounding work stream 3. The concept of a megatrend was explained and how this can impact the system.

Feedback from partners provided clarity on uncertain trends as well as highlighting interesting areas of literature to explore.

Further work has been done by WP6 to understand skills and competencies and what available literature and different frameworks can tell us about them. A high level framework for examining skills and competencies was presented to the group and then discussed.

Key Discussion Points:

- There was discussion around the potential need for, and the inherent difficulties in pursuing, a European wide definition of skills and competencies
- The scope of the project was clarified and discussed. The EU JA project is not seeking to standardise roles or skills and competencies across the 5 professions, merely to understand the drivers for the future that will affect the 5 workforce professions and also the impact to skills and competencies
- It was raised that skills and competencies should also be examined from the public's perspective to understand what skills and competencies they expect of professionals, especially as they are becoming more informed and demanding more due to the rise of technology
- The need for clarity in the framework before presenting it to experts was discussed
- The challenges around including personal attributes or 'capability' as a component of the framework was acknowledged whilst other partners noted the value of this as an approach and the impact that this can have on recruitment and training
- The similarity of approach by the proposed framework to UEMS model was acknowledged as a positive development
- How we define or differentiate a skill from a competency was discussed with various ideas and suggestions being put forward by different partners
- Comments were made about the need to be able to provide a clear description of what horizon scanning is and the purpose of this work to share with their stakeholders
- Several partners volunteered information on skills initiatives that they are involved in, such as the ESCO project and other programmes

9. What is horizon scanning and how will it be applied for this Joint Action

John Fellows and Matt Edwards presented on CfWI and WP6 horizon scanning activity to date, this included explaining what WP6's definition of horizon scanning is as well as discussing the learning points from a review of horizon scanning in England. The Big Picture Challenges, a recent piece of work undertaken by the CfWI, were introduced and copies were made available to partners as they explore

the challenges identified to have potential impact up the health and social care system in England.

Next WP6 explained the proposed methods for conducting horizon scanning in the Joint Action project. A key part of this is interviews with key experts, of which WP6 will need input from partners both to conduct interviews as well as to provide a list of experts.

Action: Partners who would like to conduct interviews and/or submit names of interviewees to contact the WP6 team by Friday 28th February with this information.

(Please see appendix 2 for a description of the timescales and process for this part of the project).

The concept of using a focal questions as well as the definition of drivers and factors was explained to partners, as well as a reminder to consider a broad range of factors when participating in horizon scanning interviews.

10. Workshop training: Horizon scanning - semi-structured interviews

This session gave participants the chance to undertake their own horizon scanning interview and experience the process for themselves. Partners were provided with a template to aid them and paired off to practice the horizon scanning interview process, both as interviewers and interviewees. Partners were asked to identify 1 lesson or top tip from the exercise, such as something they learnt or something they found difficult from conducting the exercise.

Key Discussion points:

- The need to understand what resources are available
- Clarification of the next round of the process

11. Reflections on horizon scanning - semi-structured interviews

The group then reconvened to discuss what they had learnt and the post it notes were read back to the group.

Action: WP6 team to consider feedback and produce a Frequently Asked Questions document alongside planned guidance to semi-structured horizon scanning interviews (by Friday 14th March).

12. Discussion with Professor Anne Marie Rafferty on the skills and competence of the EU Nursing Workforce

Partners were then able to watch John Fellows conduct an example interview with Professor Anne Marie Rafferty as a learning experience to take forward into their own horizon scanning interviews. The output of this sample interview will be incorporated into guidance materials once approved with the interviewed expert.

13. Revisiting the Horizon Scanning Proposals

Matt Edwards revisited the horizon scanning proposals to clarify and recap on them following the workshop training.

14. Close

The session was closed with discussion of next steps and deadlines. Michel Van Hoegaerden remarked on the need to start collecting information and moving the project forward. Michel Van Hoegaerden and Zoltan Aszalos both reminded the group of the upcoming WP4 workshop in Utrecht 6-7th of March. Giovanni Leonardi then reminded the group of the WP5 workshop in Florence 8-9th May.

Appendix 1: Table of attendees

Country	Organization	Name
Belgium	Federal Public Service, Food Safety & Environment	Lieve Jorens
		Pascale Steinberg
		Michel Van Hoegaerden
		Veerle Vivet
Bulgaria	Medical University of Varna	Plamen Dimitrov
		Todorka Kostadinova
		Emanuela Mutafova
Europe	CED	Sara Roda
Europe	CPME	Sarada Das
		Dr. Konstanty Radziwill
Europe	EFN	Alessia Clocchiatti
Europe	EPSU	Matthew Hamilton
Europe	European Commission	Caroline Hager
Europe	HOPE	Isabella Notarangelo
Europe	UEMS	Frédéric Destrebecq
Germany	University of Bremen	Melanie Boeckmann
Greece	Department of Health	Spyridon Kokkinis
		Alexandra Skitsou
Hungary	Semmelweis University	Zolatan Aszalos
		Edit Eke
		Eszter Kovacs
		Reka Kovacs
Iceland	Department of Health	Anna Björg Aradóttir
Ireland	Department of Health	Roisin Morris
Italy	Association of Italian Chiropractors	Baiju A. Khanchandani
Netherlands	Capaciteitsorgaan	Victor Slenter
Slovakia	Ministry of Health	Miloslava Kovacova

		Zuzana Matlonova
Spain	Department of Health	Mercedes de Jorge
		Prof Domingo Orozco
UK	CfWI	Greg Allen
		Charlotte Burge
		Matt Edwards
		John Fellows
		Alison Harbord
		Rachel Joint
		James Trendell
UK	Department of Health	Cris Scotter
		Judith Guest
		Bharti Kaur
UK	HEE	Andy Gill

Appendix 2: Timescales for the horizon scanning interviews

Date	Activity
Friday 28th February 2014	Partners to indicate to WP6 team if they would like to interview and also to submit names of experts to be interviewed. Interviewers known to date: • Melanie Boeckmann • Matt Edwards • John Fellows • Michel Van Hoegaerden • Baiju A. Khanchandani • Sara Roda • Victor Slenter • Pascale Steinberg • Veerle Vivet
Friday 14th March 2014	WP6 team to share Frequently Asked Questions and allocate interviews
Monday 17th March – Friday 25th April 2014	6 weeks for interviews to be conducted and templates submitted to WP6
May/June 2014	WP6 team to check with interviewers on understanding of templates to analyse
July/August 2014	Ranking stage - structured poll to rank the inputs
August – December 2014	Additional research and writing of policy briefs
January 2015	Workshop to validate initial policy briefs