



Joint Action Health Workforce
Planning and Forecasting

WP5- HANDBOOK



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JOINT ACTION HEALTH WORKFORCE
Expert Meeting, Lisbon - June 18th 2014



Funded by
the Health Programme
of the European Union

Objectives of this presentation



Discuss further some aspects of the Handbook

Communicate the structure of the Handbook for the Pilot Study

Joint Action framework

Joint action aim: to collect knowledge and share it, highlighting the good practices.

The format is a handbook and a web-portal.

- Guidelines on planning methodologies → improved tools
- Increased planning capacity & higher impact of HWF planning and forecasts on policy decision making → higher effectiveness
- Pilot projects and Recommendations for sustainability
- Grant Agreement

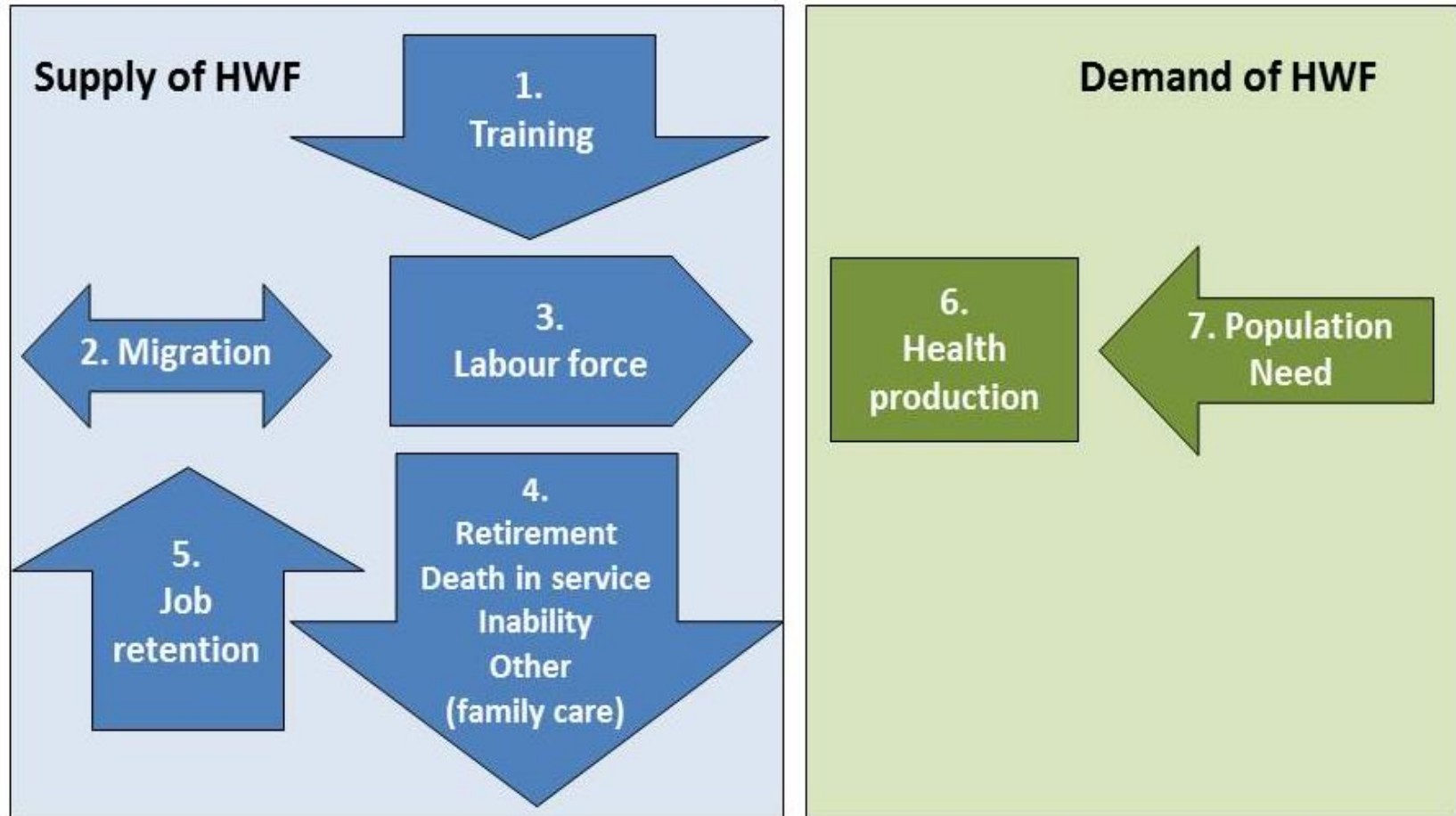
Grant Agreement

D052 Handbook on planning methodologies

The handbook will give the results of the assessment of planning methods on the base of drivers, processes, procedures (including law aspects), actors and projection period. The handbook will also point out, for the existing methodologies, a list of resources needed and benefits expected. The handbook will also include a description of cases of failure and success in different MSs.

[JA HWF Grant Agreement – Annex 1b]

The comprehensive model



The grid

(principal elements of a national planning system)

1. Which **goals** are set and with which time frame.
2. The type of the **forecasting model** and its use.
3. Which **data** is really used in the planning.
4. How the **planning process** is connected with the actions that will achieve what has been planned
5. How the **planning system** is organized in order to guarantee a permanent process.

Inclusion criteria

- 1** Criteria #1: The Joint Action will only assess the models that provide sound experimentations using both demand and supply based.
- 2** Criteria #2: For practical reasons the Joint Action will only assess (geographic) European Models
- 3** Criteria #3: The model should make future projections
- 4** Criteria #4: WP5 partners

Selected countries

- ✓ Belgium;
- ✓ Finland;
- ✓ The Netherlands;
- ✓ UK;
- ✓ Norway;

- Not complete but interesting:
- ✓ Denmark
 - ✓ Spain

- Not included:
- ✓ Ireland
 - ✓ Lithuania

Firenze material

- ✓ Country description using the Grid
- ✓ Strengths and weaknesses
- ✓ Priority within each element of the Grid (session A and C)
- ✓ Applicability of the national health systems (session B)

Matrix using Firenze material 1

A. Goals and timeframe

<p>How are the 7 countries organized to day? <i>(Description Grid)</i></p>	<p>Strengths and weaknesses presented in Firenze <i>(7 presentations 8 May morning)</i></p>	<p>Results of Group A <i>(statements discussed in 15 groups)</i></p>	<p>Results of Group B <i>(applicability of national health systems in handbook 7 groups)</i></p>	<p>Results of Group C <i>(statements discussed in 9 groups)</i></p>	<p>Evaluati on Criteria</p>
<p>7 proposals</p>	<p>7 proposals</p>	<p>Involving stakeholders</p> <p>How to set and communicate objectives</p> <p>Who sets the objectives?</p>	<p>Aspects/ contexts</p>		

Matrix using Firenze material 2

B. Type of forecasting model

<p>How are the 7 countries organized to day? <i>(Description Grid)</i></p>	<p>Strengths and weaknesses presented in Firenze <i>(7 presentations 8 May morning)</i></p>	<p>Results of Group A <i>(statements discussed in 15 groups)</i></p>	<p>Results of Group B <i>(applicability of national health systems in handbook 7 groups)</i></p>	<p>Results of Group C <i>(statements discussed in 9 groups)</i></p>	<p>Evaluati on Criteria</p>
<p>7 proposals</p>	<p>7 proposals</p>		<p>Aspects/ contexts</p>	<p>A model for each profession? Projection periods Supply/dem and/needs?</p>	

Matrix using Firenze material

C. Data set, data sources and methods

<p>How are the 7 countries organized to day? <i>(Description Grid)</i></p>	<p>Strengths and weaknesses presented in Firenze <i>(7 presentations 8 May morning)</i></p>	<p>Results of Group A <i>(statements discussed in 15 groups)</i></p>	<p>Results of Group B <i>(applicability of national health systems in handbook 7 groups)</i></p>	<p>Results of Group C <i>(statements discussed in 9 groups)</i></p>	<p>Evaluati on Criteria</p>
<p>7 proposals</p>	<p>7 proposals</p>		<p>Aspects/ contexts</p>	<p>Individual/a ggregated Data at start Specific data for plan FTE</p>	

Matrix using Firenze material 3

D. Link between planning and actions

<p>How are the 7 countries organized to day? <i>(Description Grid)</i></p>	<p>Strengths and weaknesses presented in Firenze <i>(7 presentations 8 May morning)</i></p>	<p>Results of Group A <i>(statements discussed in 15 groups)</i></p>	<p>Results of Group B <i>(applicability of national health systems in handbook 7 groups)</i></p>	<p>Results of Group C <i>(statements discussed in 9 groups)</i></p>	<p>Evaluati on Criteria</p>
<p>7 proposals</p>	<p>7 proposals</p>	<p>Levers and actions to reach objectives. How to check that objectives are reached?</p>	<p>Aspects/ contexts</p>		

Matrix using Firenze material 4

E. Organization of the planning system

<p>How are the 7 countries organized to day? <i>(Description Grid)</i></p>	<p>Strengths and weaknesses presented in Firenze <i>(7 presentations 8 May morning)</i></p>	<p>Results of Group A <i>(statements discussed in 15 groups)</i></p>	<p>Results of Group B <i>(applicability of national health systems in handbook 7 groups)</i></p>	<p>Results of Group C <i>(statements discussed in 9 groups)</i></p>	<p>Evaluati on Criteria</p>
<p>7 proposals</p>	<p>7 proposals</p>	<p>Integration local/central</p> <p>Involving stakeholders</p> <p>Outsource of planning?</p>	<p>Aspects/ contexts</p>		

Users demands on the Handbook (1)

WP7 (17/6)

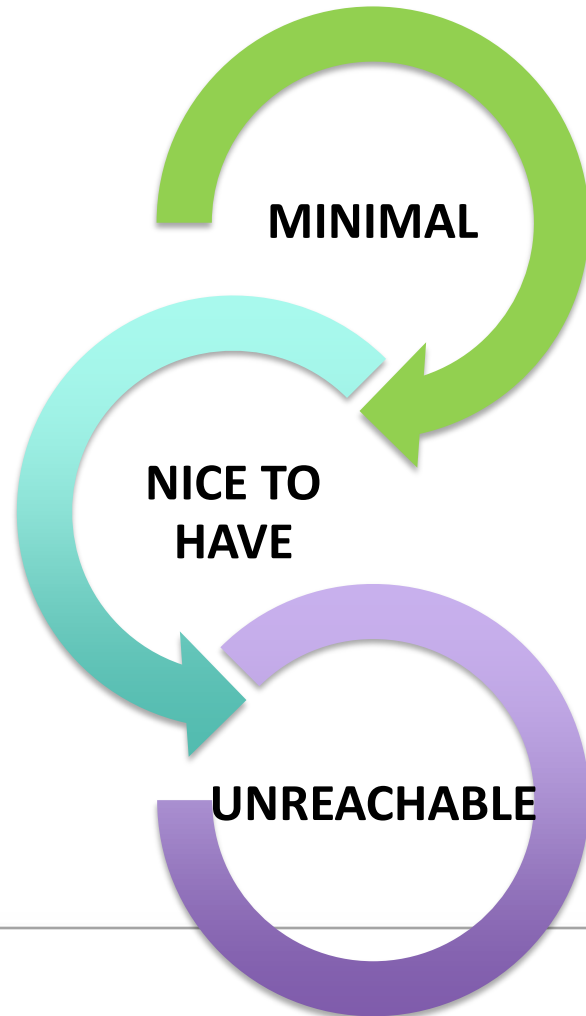
- a) Different scenarios and contexts
- b) Clarity of structure of the Handbook with a “metastructure” that helps to orient the user.
- c) A content “evidence based” to make it clear that it is not “out of the blue”.
- d) Test/self-evaluation for countries to estimate their situation.
- e) Ownership with authors from different countries with whom a user can identify.
- f) Contact details of national experts to contact whether info is still updated.

Users demands on the Handbook (2)

WP7 (17/6)

- g) Not only in English.
- h) A handbook of 400 pages.
- i) A set of leaflets to use as policy brief / advocacy material
- j) Link the health work force planning to "cost effectiveness planning" from a planning process point of view.
- k) The handbook shall contain specific software tools that helps the planner to make projections and build scenarios

Priority of users demands



How can you help us?

The planning system 1

Goals and timeframe

- ✓ Explicit overall goals
- ✓ Specific goals for each principal actor in the system

The planning system 2

Type of forecasting model

- ✓ Supply, demand and population need?
- ✓ Different health service delivery settings.
- ✓ Interaction between demand and supply.
- ✓ Projection periods
- ✓ Consequences of health workforce projections in relation to other health system goals
- ✓ Frequency of updating health workforce forecasting exercises.
- ✓ Integration of different professional groups.
- ✓ Forecasting methods (quantity and qualitative)

The planning system 3

Data set, data sources and methods

- ✓ Data sources used
- ✓ Level of aggregation of data
- ✓ Who reports the data
- ✓ Data collection specifically for planning or for other purposes and used for planning
- ✓ Creation of a unique data base for planning

The planning system 4

Link between planning and policy actions

- ✓ Levers and actions that planners can manage to reach the goal.
- ✓ How to check if the goals are reached

The planning system 5

Organization of the planning system

- ✓ At what level does workforce planning take place?
- ✓ Dedicated resources on all levels
- ✓ Specialization in particular professions and / or overview
- ✓ Organization of the workflow
- ✓ Organization of the stakeholders representation
- ✓ Which is the role of the stakeholders
- ✓ Responsibilities in the decision making process
- ✓ Communication

Next steps

JUNE, JULY & AUGUST

**Write the first draft
(modular approach)**

SEPTEMBER

**Feed-back from partners /
experts and reviewing**

OCTOBER

**WPLeaders feed-back,
WP3 evaluation,
final reviewing**

NOVEMBER

EB validation