

Joint Action Health Workforce  
Planning and Forecasting



Joint Action Health Workforce  
Planning and Forecasting

# Joint Action Management Review

Tina Jacob, WP1 leader

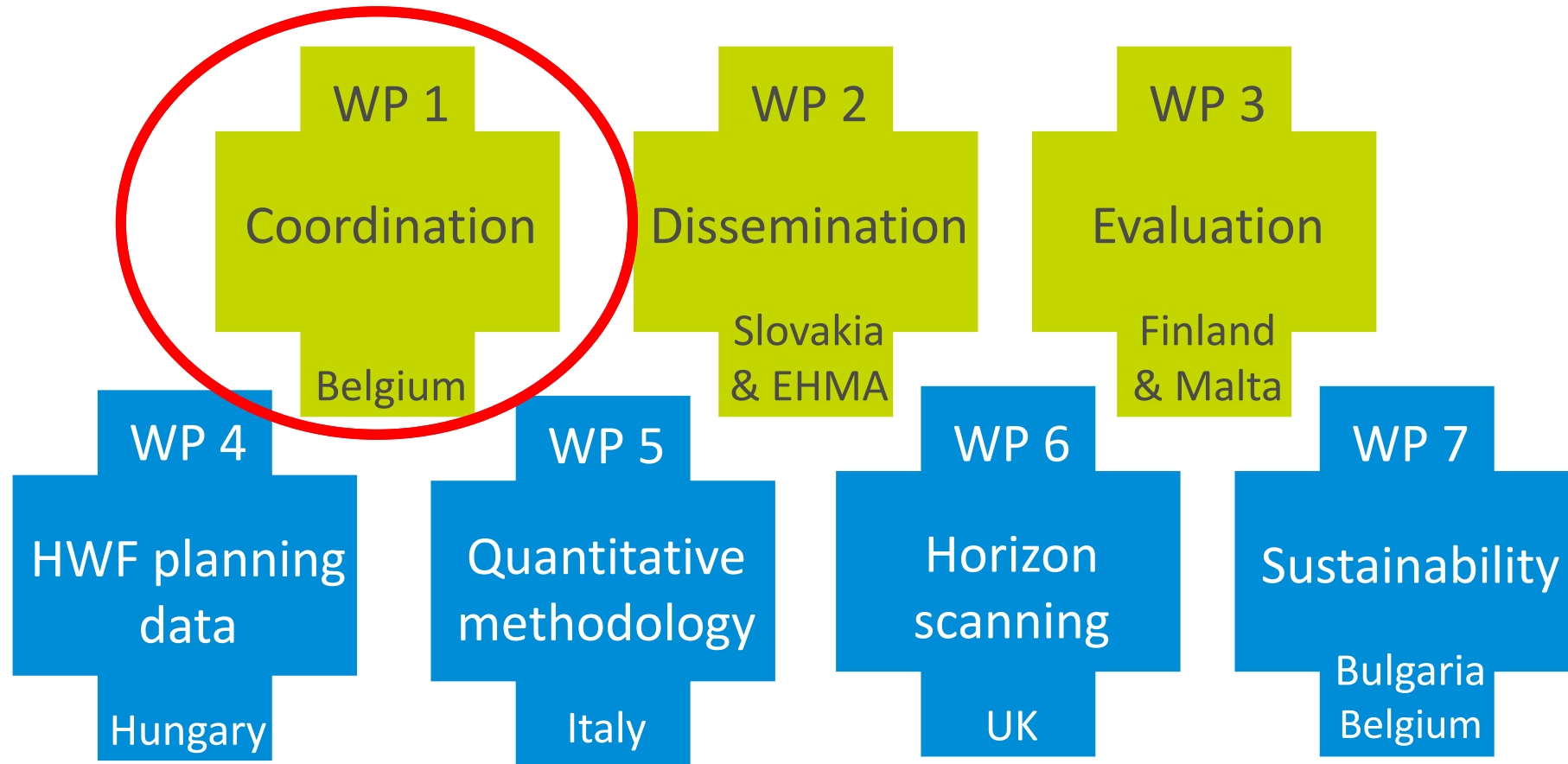
With support of Michel Van Hoegaerden, Programme Manager  
Federal Public Service of Public Health, Belgium

4th of May 2016, Mons



Funded by  
the Health Programme  
of the European Union

# The JA EUWHF : 7 work packages



## Joint Action in the beginning...





DELIVERABLE D041. – Version 09/5  
Terminology gap analysis

WP4, Semmelweis University,  
Health Services Management Training Centre, Hungary

# Joint Action last year - Plenary Assembly



List of Experts – release 1  
Version – 1.0

WP4  
Terminology gap  
analysis  
D041



D052  
HANDBOOK  
ON  
HEALTH  
WORKFORCE  
PLANNING  
METHODOLOGY  
ACROSS  
EU  
COUNTRIES

Edited by  
Annalisa Malgieri, Paolo Micheli,  
Michel Van Hoegaerden

RELEASE 1

ISBN 978-80-89825-00-4



DELIVERABLE D.033  
INTERIM EVALUATION REPORT

WP3  
Interim  
Evaluation  
Report  
D.033  
(1.4.2013-31.12.2014)

Version/Status	Last updated	Owner(s)
Version 01	Nov. 25, 14 Dec. 11, 14	AP AP, JL, MVP, AX
Version 02	Jan. 8, 15 Jan. 14, 15 Jan. 16, 15 Jan. 26, 15	AP AP JL & AP JL, MVP, AP
Version 03	Jan. 27, 15 Jan. 28, 15 Jan. 29, 15	AP AP AP
Version 04	Feb. 6, 15	AP, MVP, JL
Version 05	Feb. 10, 15 Feb. 17, 15	AP AP (based on comment)
Version 06	Feb. 17, 15 Feb. 18, 15 Feb. 23, 15	AP (final edits) AP (final edits) MVP, JL, AX (Based on T. Jaacob)
Version 07	March 19, 15	AP, JL & MVP
Version 1.0	May 20	Zuzana Mattonova on



User guide

WP6  
Deliverable  
D.061

User guide  
qualitative  
health workforce  
and forecasting

Authors: John Fellows and Massimo Lencucha  
Centre for Workforce Intelligence, UK



D072  
List of Experts  
RELEASE 1



WORK PACKAGE 7

Medical University of Varna, Bulgaria  
Catholic University of Leuven, Belgium  
National Centre of Public Health and Analyses, Sofia, Bulgaria



# Joint Action last year - Plenary Assembly

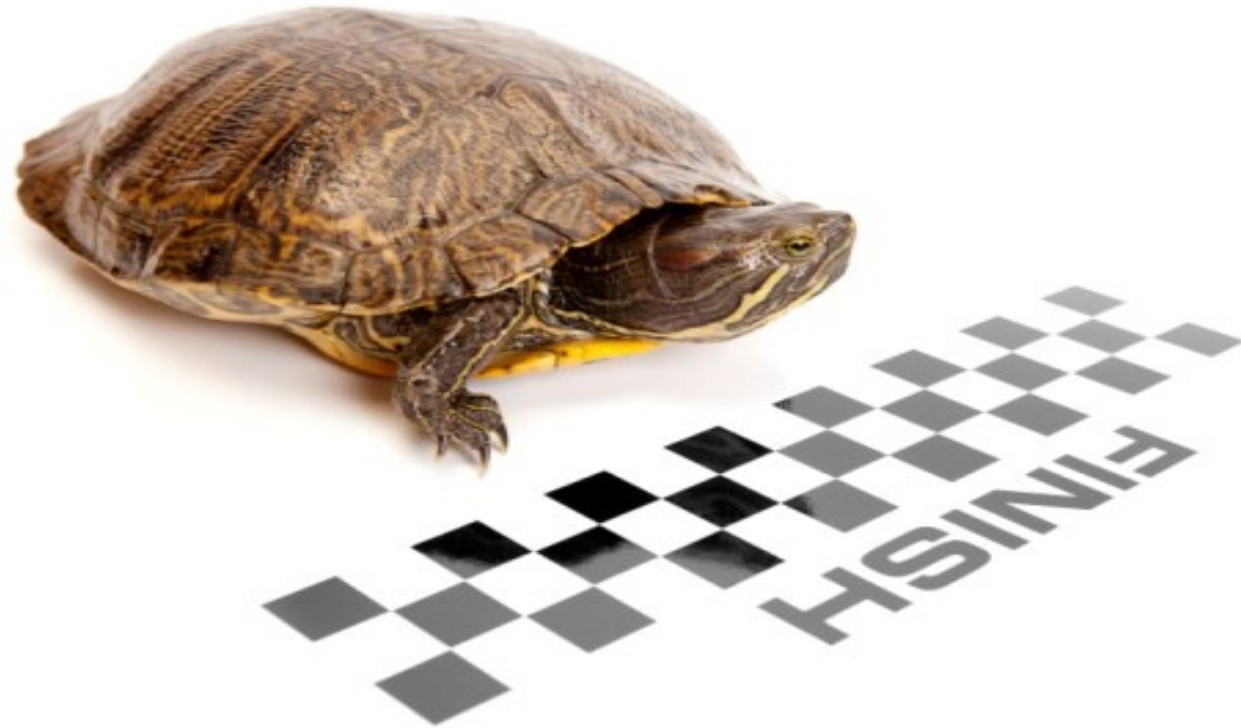


Conclusions Madrid (2015):

- Underspending of budget
- Delay in production of deliverables
- Changes in scope or quality are not an option
- More intense cooperation with some partners

## We Need You!

## Joint Action now



# Overall JA Status\*







Joint Action Health Workforce  
Planning and Forecasting

# Status in delivery



Funded by  
the Health Programme  
of the European Union

# Finalised deliverables



User guidelines on qualitative methods in health workforce planning and forecasting



Final Version  
Report on Mobility data  
WP4, Semmelweis University  
Health Services Management Training Centre, Hungary



DELIVERABLE D.033 – Version 1.0 / Final  
INTERIM EVALUATION REPORT  
WP3

WP6  
Deliverable  
D.061



User guidelines on  
qualitative methods in  
health workforce planning  
and forecasting

Authors: John Fellows and Matt Edwards  
Centre for Workforce Intelligence, UK



Funded by  
the Health Programme  
of the European Union



CENTRE  
FOR  
WORKFORCE  
INTELLIGENCE



Funded by  
the Health Programme  
of the European Union

WP2  
Stakeholder  
Analysis  
version  
D023

WP4 Report  
on Mobility data

Health workforce mobility  
data serving policy  
objectives



John  
Fellows

Version and Status	Deadline
D042 Concept - OK	06 May 2015
Draft 01 - OK	07 June 2015
Draft 02 - OK	10 August 2015
Draft 03 - OK	25 September 2015
Draft 04 - OK	12 October 2015
Draft 05 - OK	23 October 2015
Draft 06 - OK	27 October 2015
Draft 07 - OK	07 November 2015
Draft 08 - OK	11 December 2015
Draft 09 - OK	20 Jan 2016
Draft 09S - OK	7 March 2016
Final	11 March 2016

Authors: Zoltán Azzaló (Work Package 4 leader), Róbert Zoltán Csésti, Edmond Glasziou, and Michel Van Hoeg (Joint Action)



Funded by  
the Health Programme  
of the European Union

Michel Van Hoeg  
Zuzana Matlonova, WP2, Ministry of Health of the Slovak republic  
Paul Giepmans, WP2, EHMA  
Judith van den Broek, WP2, EHMA  
David Smith, WP2, EHMA

Ministry of Health of the Slovak Republic  
European Health Management Association

[www.healthworkforce.eu](http://www.healthworkforce.eu)

Page 1/25



Joint Action  
Health Workforce  
Planning and Forecasting

WP3

D052  
HANDBOOK  
ON  
HEALTH  
WORKFORCE  
PLANNING  
METHODOLOGIES  
ACROSS  
EU  
COUNTRIES

Edited by  
Annalisa Malgieri, Paolo Michelutti,  
Michel Van Hoegaerden

RELEASE 1  
ISBN 978-80-89125-00-4



Funded by  
the Health Programme  
of the European Union

Health  
MINIM  
FOI



List of Experts – release 1  
Version – 1.0

D072  
List of Experts  
RELEASE 1



Joint Action Health Workforce  
Planning and Forecasting

WORK PACKAGE 7

Medical University of Varna, Bulgaria  
Catholico University of Leuven, Belgium  
National Centre of Public Health and Analyses, Sofia, Bulgaria



Funded by  
the Health Programme  
of the European Union



KU LEUVEN



Version/Status	Last updated	Owner
Module Concepts	22.05.2014.	Hungarian Team + WP1 + Reviewers
Draft 01	20.07.2014.	Hungarian Team + WP1 + Reviewers
Draft 02	11.08.2014.	Hungarian Team + WP1
Draft 07	03.09.2014.	Hungarian Team + WP1
Draft 08	06.10.2014.	Hungarian Team + WP1
Draft 08/2	20.10.2014.	Core reviewers + WP3
Draft 09	24.10.2014.	Executive Board (WP1 + WP2 + WP3)
Draft 09/2	05.01.2015.	WP4 Partners
Draft 09/3	29.01.2015.	WP3
Draft 09/4	20.02.2015.	Submission to the Executive Board
Draft 09/5	10.03.2015.	Submission to General Assembly
Draft 09/5	24.03.2015.	Submission for scientific editor
Draft 1	19.08.2015	Submission for WP7



Funded by  
the Health Programme  
of the European Union

Page 1

# Approved\* deliverables and (almost) ready for dissemination

CFWI CENTRE FOR WORKFORCE INTELLIGENCE

Future skills and competence of the health workforce in 2035

Multi-disciplinary team working  
Regulatory awareness and revalidation skills  
Systems thinking and workforce planning skills and competence

Coaching and health promotion  
Prevention

Populations  
Health workforces  
Health care

Driving forces out to 2035  
New skills and competences

Funded by the Health Programme of the European Union

Final Version Report on Mobility data  
WP4, Semmelweis University Health Services Management Training Centre, Hungary

WP4 Report on Mobility data  
Health workforce mobility data serving policy objectives

Version and Status	Deadline	Contributor
D042 Concept - OK	06 May 2015	WP4 + PGM
Draft 01 - OK	07 June 2015	WP4
Draft 02 - OK	10 August 2015	WP4 + PGM + WP1
Draft 03 - OK	25 September 2015	WP4 + Reviewers
Draft 04 - OK	12 October 2015	WP3 1st round + Reviewers
Draft 05 - OK	23 October 2015	WP4 Partners
Draft 06 - OK	27 October 2015	WP4 - Submission to WP3
Draft 07 - OK	07 November 2015	WP4 - Submission to the EB
Draft 08 - OK	11 December 2015	WP4 - Submission to WP3
Draft 09 - OK	20 Jan 2016	WP3 + WP4 to Bremen EB
Draft 095 - OK	7 March 2016	WP4 + Professional Editor
Final	11 March 2016	WP4

Authors: Zoltán Aszalós (Work Package 4 leader), Réka Kovács, Edit Eke, Eszter Kovács, Zoltán Cserhádi, Edmond Girasek, and Michel Van Hoegaerden (Program Manager of the Joint Action)

Funded by the Health Programme of the European Union

Final Version Report on Mobility data  
WP4, Semmelweis University Health Services Management Training Centre, Hungary

Experiences in long horizon scanning

Version and Status	Deadline	Contributor
D042 Concept - OK	06 May 2015	WP4 + PGM
Draft 01 - OK	07 June 2015	WP4
Draft 02 - OK	10 August 2015	WP4 + PGM + WP1
Draft 03 - OK	25 September 2015	WP4 + Reviewers
Draft 04 - OK	12 October 2015	WP3 1st round + Reviewers
Draft 05 - OK	23 October 2015	WP4 Partners
Draft 06 - OK	27 October 2015	WP4 - Submission to WP3
Draft 07 - OK	07 November 2015	WP4 - Submission to the EB
Draft 08 - OK	11 December 2015	WP4 - Submission to WP3
Draft 09 - OK	20 Jan 2016	WP3 + WP4 to Bremen EB
Draft 095 - OK	7 March 2016	WP4 + Professional Editor
Final	11 March 2016	WP4

Authors: Zoltán Aszalós (Work Package 4 leader), Réka Kovács, Edit Eke, Eszter Kovács, Zoltán Cserhádi, Edmond Girasek, and Michel Van Hoegaerden (Program Manager of the Joint Action)

Funded by the Health Programme of the European Union

Joint Action Health Workforce Planning and Forecasting

HANDBOOK PLANNING AND FORECASTING

IMPLEMENTATION

Guidelines and suggestions on how to implement



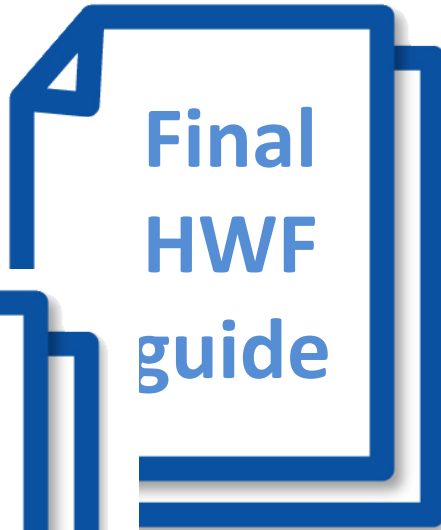
\* Approved by the JA Executive Board

# Deliverables still to come

WP5  
Report on  
Pilot Projects  
and Feasibility  
Studies  
D054



Version/Status	Last updated	Owner(s)
Version 01	11/04/2016	WP5 Italian Team
Version 02		
Version 03		
Version 04		
Version 05		



List of Experts – release 1  
Version – 1.0

072  
List of Experts  
RELEASE 1



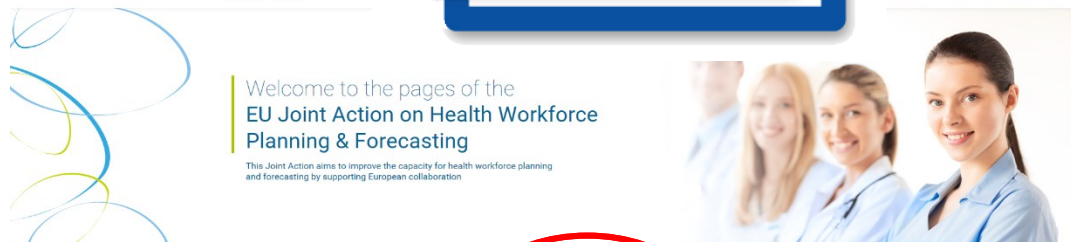
## WORK PACKAGE 7

Medical University of Varna, Bulgaria  
Catholic University of Louven, Belgium  
National Centre of Public Health and Analyses, Sofia, Bulgaria



DELIVERABLE D073/D074 – Version 01.3  
Concept of the technical recommendations & recommendations towards policy making  
WP7, Medical University of Varna and National Centre of Public Health and Analyses, Bulgaria  
Catholic University of Louven, Belgium

WP7  
Concept of the technical recommendations & recommendations towards policy making  
D073/D074



**Handbook on HWF Planning Methodologies**

A collection of good practices and theoretical examination of the HWF plans across 7 EU countries.

**The Future Health Workforce HORIZON SCENARIO**

Planning for the future health workforce across Europe including the skills and competences implications. (This scenario is under progress and will be available in the coming months).

Join our Newsletter

Your Email:

Your Name:

Select list(s):

Newsletter List

List of Experts

\*required

Version/Status	Last updated	Owner(s)
Version 01	16/01/2016	WP7 (to Executive Board)
Version 01.1	26/01/2016	WP7 (to Executive Board)
Version 01.2	26/02/2016	WP7 (to Survey Participants)
Version 01.3	30/03/2016	WP7 (to WP3 and WP Leaders)
Version 02		



# Official partners of the Joint Action

2013:

30 Associated partners

15 Collaborating partners

2016:

30 Associated partners

51 Collaborating partners



Joint Action Health Workforce  
Planning and Forecasting

# Changes in contract Timing & Budget



Funded by  
the Health Programme  
of the European Union



# Change management

- Since Madrid 2015, new changes have been processed in
    - Budget
    - Planning
    - Involvement of partners
- *Last amendment of the Grant Agreement*

Decision of Executive Board\*: OK



Final approval by CHAFAEA  
will be requested\*\*



# Budget & contract revision - last step

1. All budget changes finalised - total budget stays the same
2. Timings & description of milestones and deliverables + additional activities (f.e. WP4 toolkit, professional editor)
3. WP1 has done final administration and last check of all (copies of all mails, final changes in Annex Ia and Ib & Annex II)
4. Ready to be sent to CHAFEA next week (paper and electronically)
5. Await acceptance of amendment by CHAFEA (approx. 1 month)



Joint Action Health Workforce  
Planning and Forecasting

# Status in budget

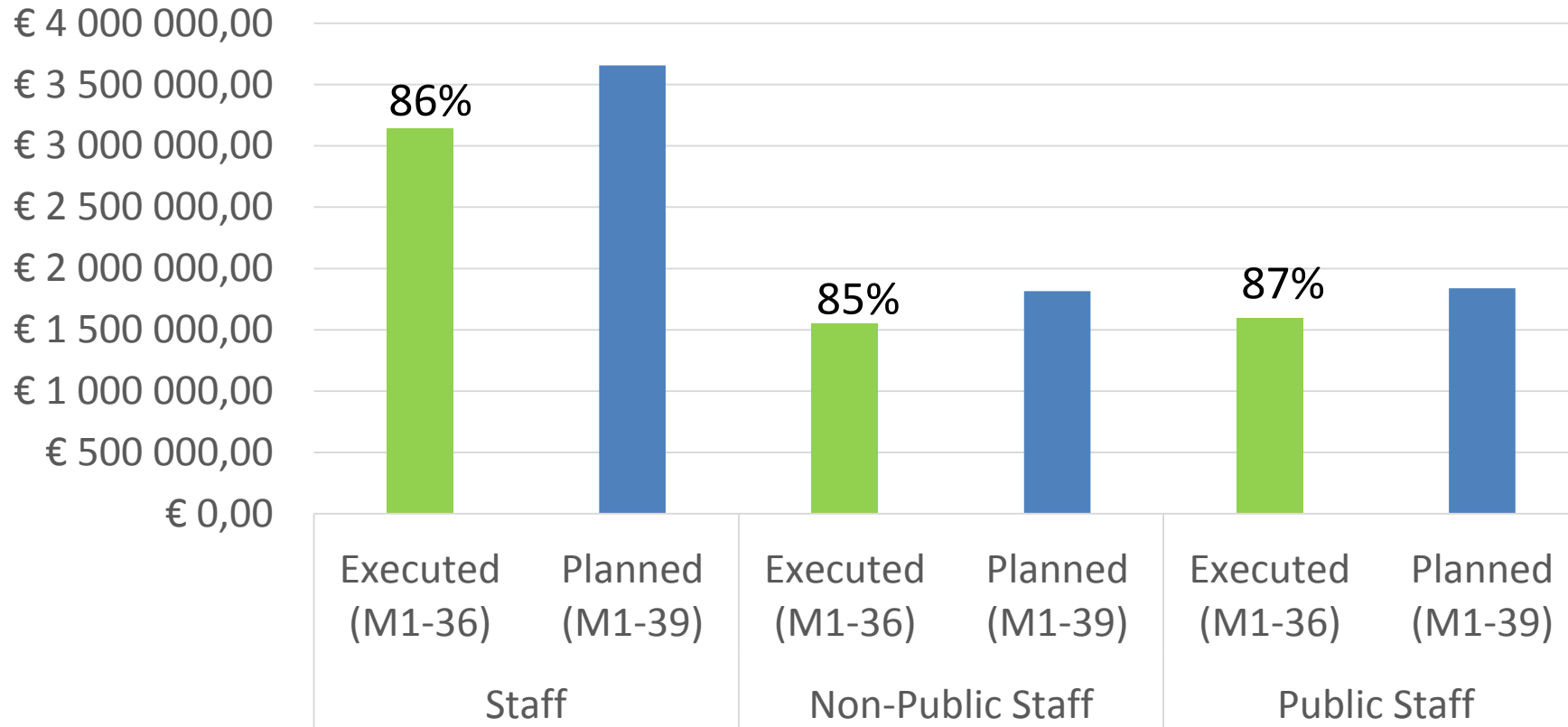


Funded by  
the Health Programme  
of the European Union

# Progress\* on Staff costs (all partners)

Reporting period  
M1-M36

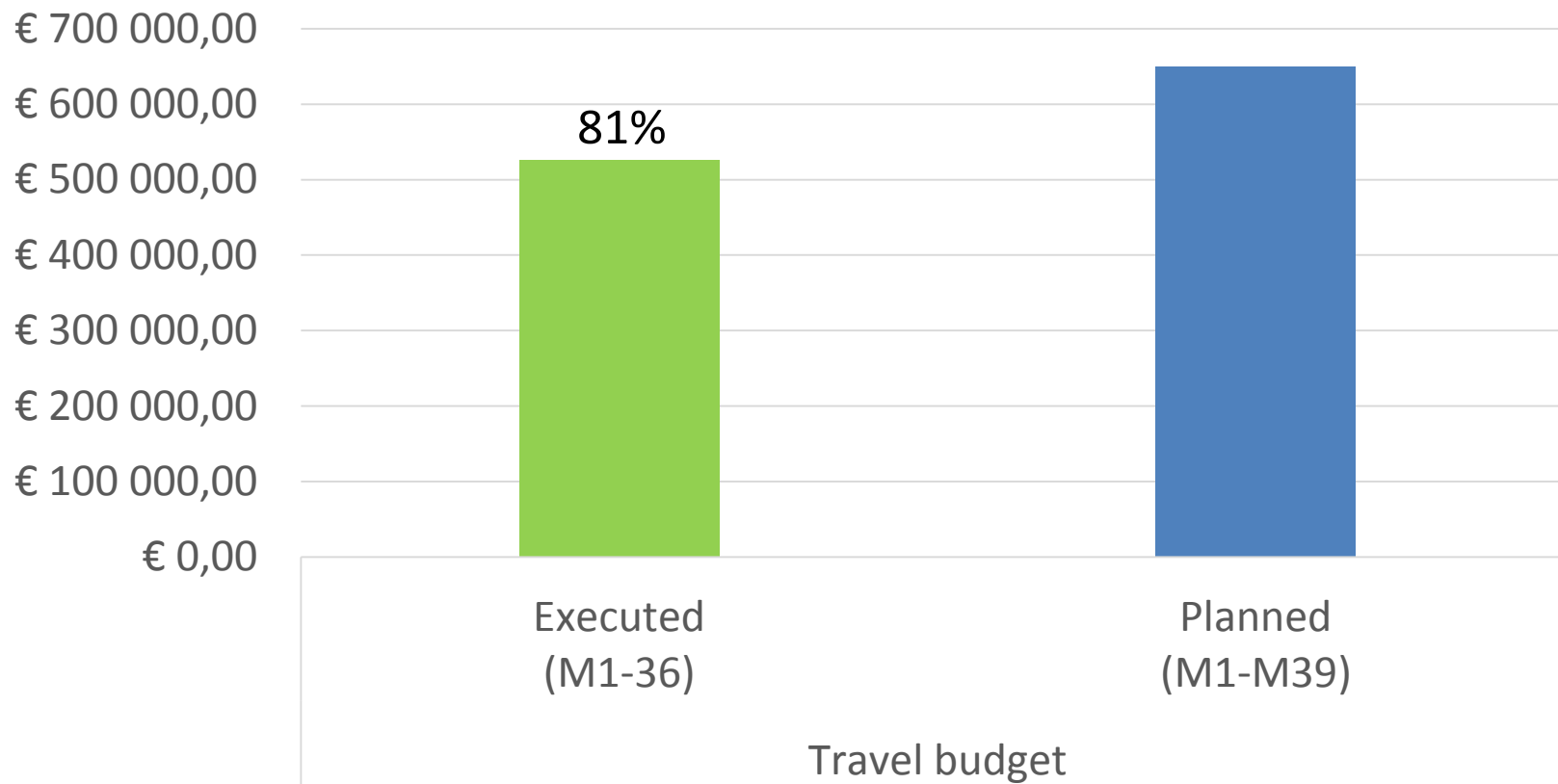
Status of Staff Budget of all partners (M1-M36)



- Gap between reality and planning is still present, but smaller
- Status at 86%
- Should be at 92% (compared to M39)
- Good news!  
Consumption rate of public officials = non public officials

# Progress\* on Travel costs (all partners)

Status of Travel budget of all partners (M1-M36)



- Gap between reality and planning is still present
- Status at 81%
- Should be at 92% (compared to M39)

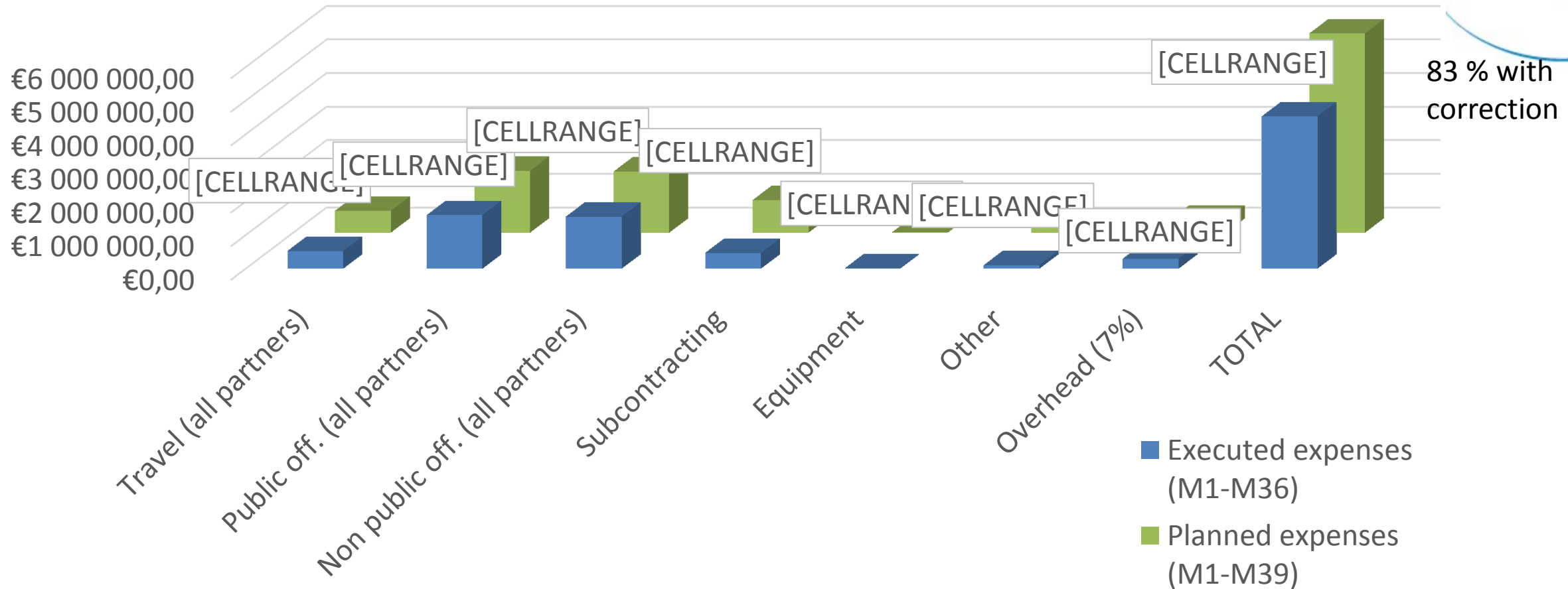
# Progress on Overall budget\*

	Executed expenses (M1-M36)	Planned expenses (M1-M39)	% used
Travel (all partners)	€525.534,42	€650.305,00	81%
Public off. (all partners)	€1.593.418,73	€1.839.697,20	87%
Non public off. (all partners)	€1.548.698,34	€1.815.973,00	85%
Subcontracting**	€468.004,00	€970.286,50	48%
Equipment	€1.500,44	€9.054,00	17%
Other	€100.860,62	€256.450,00	39%
Overhead (7%)	€296.661,16	€387.923,60	
<b>TOTAL</b>	<b>€4.534.677,71</b>	<b>€5.929.689,30</b>	<b>76%</b>

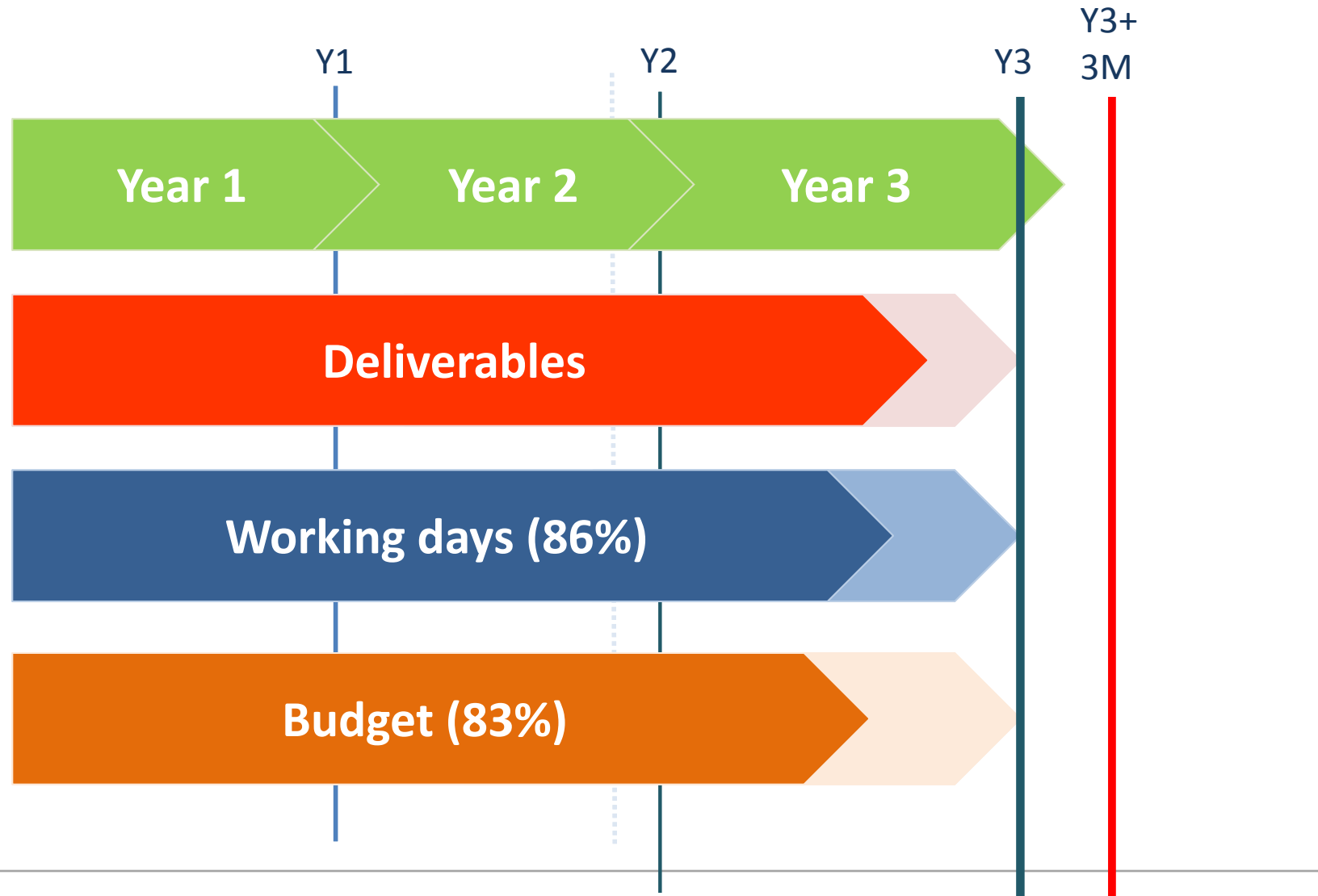
- Gap between reality and planning is still present, but smaller
- Status at 76%
- **83% with correction for Subcontracting**
- Should be at 92% (M36 compared to M39)

# Progress on Budget

Status total budget at M36



# Overall Progress on scope and budget



# Overall assessment of the status of the project

- Strong progress
- Some deliverables still to come
- Delivery of the programme within foreseen budget (small underspending of resources)
- Planning on time & budget needed several adaptations
- We used up the contingency in the planning
- Finally, delivery of contract at 100% after 39 months





# Coordination activities by Belgian team (WP1) (1)

## – COORDINATION ACTIVITIES

- Project Planning & Follow up
- Set-up of Platform of Collaboration (SharePoint) between all partners
- Intense support to core work packages
- Strong coordination with horizontal work packages
- Budget management for all partners
- Organisation of coordination meetings (until now)
  - 8 Executive Board Meetings
  - 3 Electronical Executive Board Meetings
  - 6 Work Package Leader Meetings
  - 20 Work Package Electronical Leader Meetings
  - Co-organisation 3rd Conference Varna (in collaboration with WP2/BG\_MUV)

# Coordination activities by Belgian team (WP1) (2)

## – MANAGEMENT ACTIVITIES

- Contract Management: Amendment process of GA finalising (last change request)
- Risk, Issue and Change management
- Bilateral meetings & coaching
- Quality & Process Management
- Content Management & scientific coordination (PGM\*)
- Coaching all Work packages

## – STRATEGIC ACTIVITIES

- Bilaterals with EU COM
- Political dissemination (in collaboration with EU COM)

# Results & Planning WP1

- Last Milestones achieved:
  - ✓ M1.3 Executive Board Meeting 8 (2 additional in total)
  - ✓ Plenary Assembly 3 & Closure (Now)
- Future:
  - ✓ 1 extra Executive board meeting
- Deliverables achieved:
  - ✓ Interim Financial and Technical Report  
→ 2<sup>nd</sup> payment
- **Final Deliverable:**
  - ✓ Final Financial and Technical Report  
→ 3<sup>rd</sup> payment for all assoc. partners



# FINAL REPORTING (D014)

**Crucial information for  
Associated partners**



Joint Action Health Workforce  
Planning and Forecasting



Funded by  
the Health Programme  
of the European Union

# Final Report

➤ To be delivered by the WP1 (BE\_FPS as coordinator),  
but implication for **ALL associated partners**

## 1. Final Technical report:

Description of the objectives of the programme, the activities, the events, the products, the lessons learned, the added value, etc.

## 2. Final Financial report:

Total of eligible costs of all associated partners

# Final Technical Report



## European Health Workforce Planning and Forecasting

**Chafea Project Grant Nr:**

2012 22 01

**Acronym:**

EUHWforce

**FINAL REPORT**

[Written by]  
[Month - 20XX]

Consumers, Health,  
Agriculture and Food  
Executive Agency

# Final Technical Report

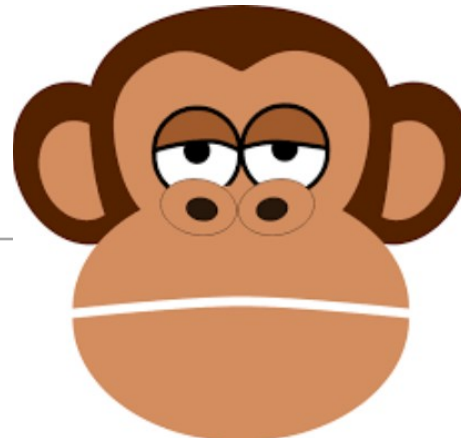
## Table of content:

- Final Publishable Executive Summary
- Initial scope of the Project
- Deliverables of the Project
- Project implementation
- Project Results and Visibility
- Discussion in relation to project objectives
- Further remarks



# Final Technical Report

- Input from partners is welcome on:
  - Added value of the programme
  - Did the programme reach it's objectives?
  - Added value from EU Funding?
  - How could the project results best be further used?
  - How can policy makers use the project results?
  - ETC.



# Final Financial Report

Project Acronym: .....  
 Agreement number: 200X XXXX

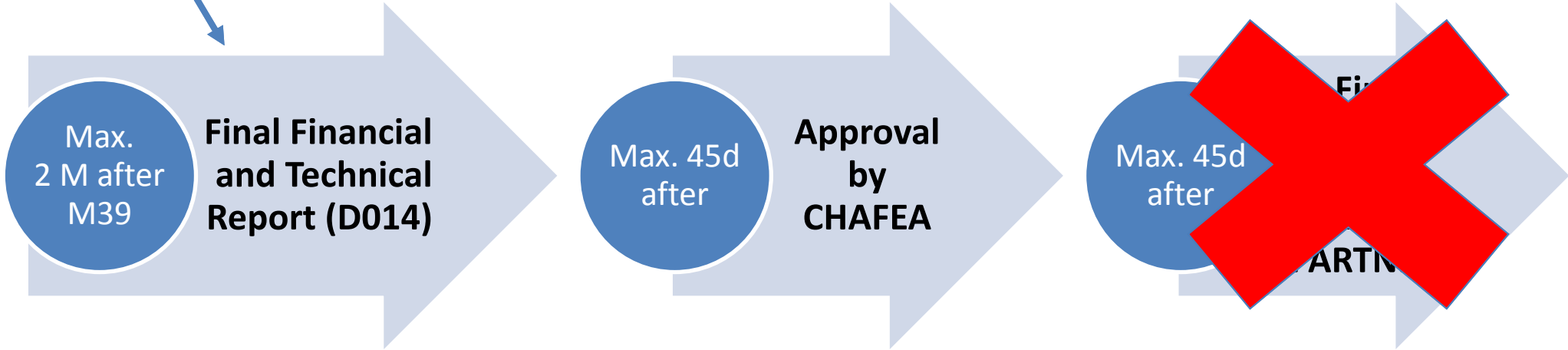
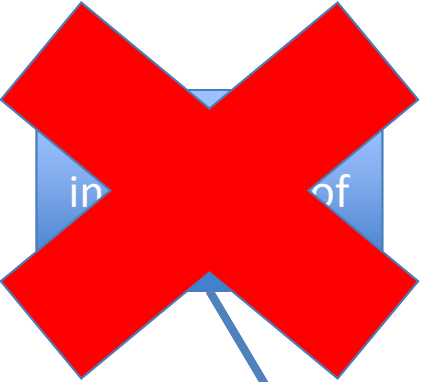
FINAL CONSOLIDATED FINANCIAL STATEMENT  
 Final - Parts A&B - Per partner

EAHC - Guidelines for request of balance payment - Grant for Action - 25 09 2008

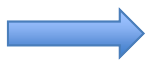
## TEMPLATE no. 3

<b>Expenditure:</b>		Main beneficiary	Associated beneficiary	Associated beneficiary	Associated beneficiary	Associated beneficiary	Associated beneficiary	Associated beneficiary	Associated beneficiary
		Partner Acronym 1	Partner Acronym 2	Partner Acronym 3	Partner Acronym 4	Partner Acronym 5	Partner Acronym 6	Partner Acronym 7	Partner Acronym 8
<b>Direct eligible costs</b>	<b>TOTAL</b>								
E1. Staff	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
<i>a. Costs not pertaining to national officials</i>	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
<i>b. Costs pertaining to national officials</i>	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
E2. Travel costs and subsistence allowances	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
E3. Equipment	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
E4. Consumables & supplies directly linked to the project	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
E5. Subcontracting costs	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
E6. Other costs	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
<b>Total direct eligible costs</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
E7. Overheads	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
<b>Total - Expenditure</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
% of Overheads	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
<b>Income:</b>									
I1. Commission funding	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
I2. Contribution pertaining to public officials	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
I3. Applicant's financial contribution	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
I4. Income generated by the project	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
I5. Other external resources	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
I6. Other current funding applications	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
<b>Total - Income</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
% of Commission funding	0,00%								

# Final Payment



**“Joint” Action**



**“Joint” Responsibility**

**Risk:  
Final Payment  
delayed**

# Financial Report - Rules G.A.\* (1)

Rules for  
Eligibility

**! Costs made for execution of Joint Action & foreseen in budget!**

- Travel costs
    - Supporting documents (hotel vouchers, plane tickets, boarding passes, restaurant receipts, subsistence allowance documents, etc.)
  - Staff
    - Daily rates (2 periods: 2013-2014 // 2015-2016) for all reported staff
- Activity Logs



# Financial Report - Rules G.A. (2)

Rules for  
Eligibility

Other types of costs:\*

- **Equipment costs:**
  - Depreciation rules
  - Bought especially for JA tasks
- **Subcontracting costs**
  - Following and describing procedures for (public) tenders
  - Travel and other costs for subcontractors
- **Other costs**
  - F.e. Travel costs for experts/speakers, Translation, Meeting costs, etc.

→ Progress reports



# Financial Report

## Documents needed from partners

Absolute deadline:

15th of July 2016

For receiving:

- Activity Logs (incl. M39 - June): printed and signed
- Progress Reports (WPLs): printed and signed
- All supporting documents (for all categories of costs)
- Daily rate documents
- Other statements

[EUHWForce@health.belgium.be](mailto:EUHWForce@health.belgium.be)

 SharePoint

# When you have doubts

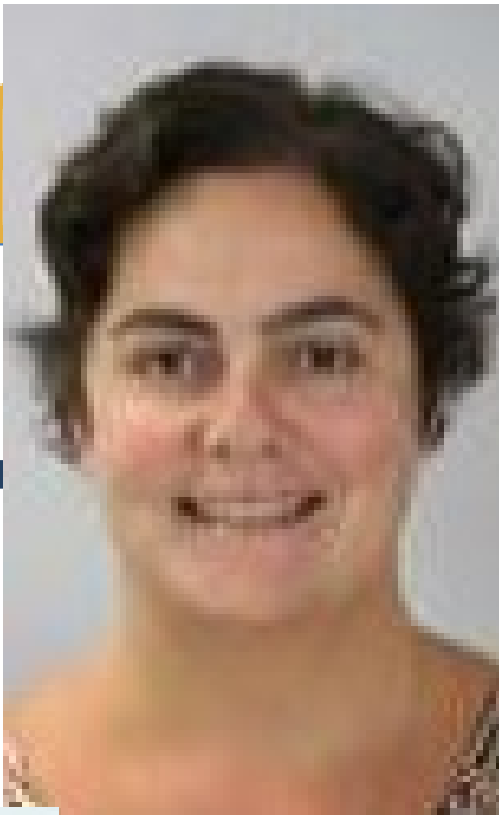


Don't hesitate to  
contact us!

[EUHWForce@health.belgium.be](mailto:EUHWForce@health.belgium.be)



axmat  
anko



yabonga  
esekkü



T M

enkosi

obrigad



gimda kasim  
감사합니다  
xiex



merci  
merci  
merci





# Thank you Boss!



bedankt  
obrigado  
dziękuje  
mauruuru  
t  
saolun  
didi mauboba  
kam sa  
didi mauboba  
mesu  
sobodi  
dekuji  
mauruuru  
koszonim  
hvala  
gracie  
bayanlala  
nandi  
dhanyavad  
kiitos  
dankie  
faafetai lava  
Баярлалаа  
спасибо  
рахм  
didi mauboba  
kam sa  
didi mauboba  
mesu  
sobodi  
dekuji  
mauruuru  
koszonim  
hvala  
gracie  
bayanlala  
nandi  
dhanyavad  
kiitos  
dankie  
faafetai lava  
Баярлалаа  
спасибо  
рахм

ederim  
grazzi  
mahalo  
tapadh leat  
hvala  
asante  
manana  
obrigada  
tenki  
mochchakkeram  
mamnun  
ibh maith agat  
chokrane murakoze  
takk  
dakujem  
trugarez  
shukriya  
mercé  
merci  
merci

ভোসকে ধন্যবাদ  
감사합니다  
xiexie

# The JA EUHWF : More information

## Website

<http://www.healthworkforce.eu/>

## Email

[EUHWForce@health.belgium.be](mailto:EUHWForce@health.belgium.be)

**Thank you for your attention !**