



# Useful Tools for Health Workforce Planning

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# Joint Action on European Health Workforce Planning and Forecasting

- providing a platform for collaboration and exchange between stakeholders
- preparing better Europe's future health workforce
- improving the capacity for health workforce planning and forecasting
- supporting collaboration and exchanges between MS and by providing state-of-the-art knowledge on quantitative and qualitative planning.

<http://healthworkforce.eu/>

JA EUHWF 20122201



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the Health Programme  
of the European Union

# Planning environment & activities

Ageing population

Evidence-based policy interventions

Future needs

New care patterns and guidelines

Data collections

E-health and new technology

Planning

New skills

Forecasting

Ageing workforce

Monitoring

New professional roles

Free movement - Mobility

Strategy in HWF development

Systematic planning





Joint Action Health Workforce  
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# Context of Planning activities

HWF monitoring  
HWF forecasting  
HWF planning



Processes (e.g., data collection, data reporting, data management, data flows) of HWF planning



Data (e.g., data sources, datasets, data categories, methodology) available for HWF planning

**DATA QUALITY**



Reports available: <http://healthworkforce.eu/work-package-4/>



# Objectives



- To share practices, different approaches and exchange experiences regarding HWF planning activities
- To reveal major challenges in HWF planning
- To present a newly designed „Toolkit on HWF Planning” that provides platform for self-evaluation in order to overcome limitations and to develop planning processes and data



# Results on HWF planning activities

	Doctors	Dentists	Nurses	Midwives	Pharmacists
<b>HWF monitoring</b>	12	9	12	11	10
<b>HWF forecasting</b>	9	6	5	5	4
<b>HWF planning</b>	8	6	6	5	6

Table 1 Prevalence of HWF monitoring, forecasting and planning measures (Nr of countries)





# Typical gap groups

Process

Data

<b>GAP GROUP 1 Difficulties in national-level collaborations</b> <ul style="list-style-type: none"><li>• information and data flow failures</li><li>• unclear roles and responsibilities of actors, stakeholders involved in HWF planning</li><li>• lack of or unclear resources</li><li>• unclear structure of planning</li></ul>	Go to R1-2-3-4-5	R12
<b>GAP GROUP 2 Methodological challenges</b> <ul style="list-style-type: none"><li>• linking multiple sources</li><li>• misuse/lack of models and methods</li><li>• no tracking of shortage/surplus, i.e. mobility</li><li>• no consideration of supply/demand side</li></ul>	Go to R6-7-8	
<b>GAP GROUP 3 State of data</b> <ul style="list-style-type: none"><li>• quality</li><li>• availability</li><li>• timeliness</li><li>• estimates</li></ul>	Go to R6-7-8-9-10	
<b>GAP GROUP 4 Qualitative approaches</b> <ul style="list-style-type: none"><li>• collecting qualitative data</li><li>• complementing quantitative with qualitative data</li></ul>	Go to R7-8-9-10-11	





# Conclusions

- Targeted interventions and systematic actions are needed when developing HWF planning
- The preconditions-processes-data should be appropriate, since they are interlinked and influence data quality
- Practical support is necessary based on existing country experiences
- Countries adapting processes-data to their own circumstances



<http://hwftoolkit.semmelweis.hu>

TOOLKIT  
ON HEALTH WORKFORCE  
PLANNING



# Toolkit on HWF Planning



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## Meet Captain Planning,

who will guide you at the webportal. Captain Planning will instruct you on your evaluation journey, tell you how to fill in different tools or advice you what to do next.

[JOIN NOW](#)



# Toolkit on HWF planning

- Newly designed tools address frequently occurring difficulties and provide manageable solutions that foster development
- Tools do not address every situation in detail, but they are adaptable for country environments
- The Toolkit can contribute to self-evaluation and focussed attention towards improvement directions in order to foster systematic HWF planning in the EU
- Recommends regular revision of HWF planning systems



# Introductory Tool



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# Tool1



**Tool 1:** Evaluation list of **Maturity level of systematic HWF planning**

**Tool type:** Rating scale

**Target group:** HWF Planning Committee if applicable, Ministry or institution/authority responsible for HWF planning

**Benefit of the tool:** provides support for assessing the current state of national HWF planning



Test your readiness for systematic and comprehensive HWF planning. Please consider at least one of the five sectoral health professions (physicians, nurses, midwives, dentists, pharmacists) and focus on the national level. Evaluate your score based on whether you already completed the following steps by using 0 “not at all”, 1 “somehow”, and 2 “completely”.





# Tool1

1.	Set-up of clear and explicit HWF planning objectives in national health policy	0	1	2
2.	Achievement of strong political commitment and awareness	0	1	2
3.	Coordinated communication and information flow among national-level stakeholders	0	1	2
4.	Dedicated and established HWF Planning Committee at the national level, designated responsible entity/specific group	0	1	2
5.	Multisectoral collaboration in HWF planning	0	1	2
Please summarize your yellow scores:				
6.	Established methodology and use of explicit model elements (with growing complexity)	0	1	2
7.	Data coverage and completeness on both supply and demand sides	0	1	2
8.	Different data sources linked to each other, fostered data exchange, building an integrated interlinked database/warehouse	0	1	2
9.	Support of online platforms, HR information systems	0	1	2
10.	Utilisation of qualitative methods	0	1	2
Please summarize your green scores:				
11.	Regular evaluation of the HWF Planning System, continuous fine-tuning	0	1	2
12.	Implementation and policy actions based on recommendations by the HWF Planning Committee	0	1	2
13.	Sustainability ensured by accomplishable/adequate resources	0	1	2
Please summarize your blue scores:				



# Tool1



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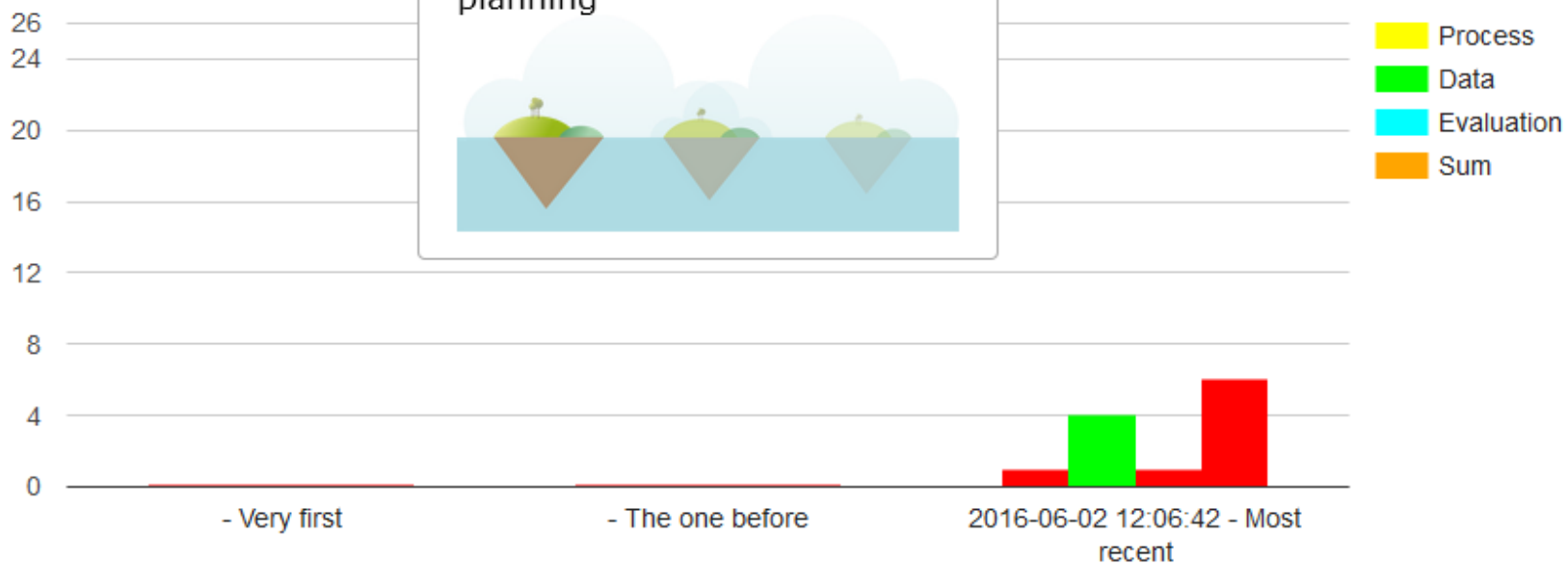


**Captain Planning says:** ✕

First steps are done, let us  
move further to systematic  
planning

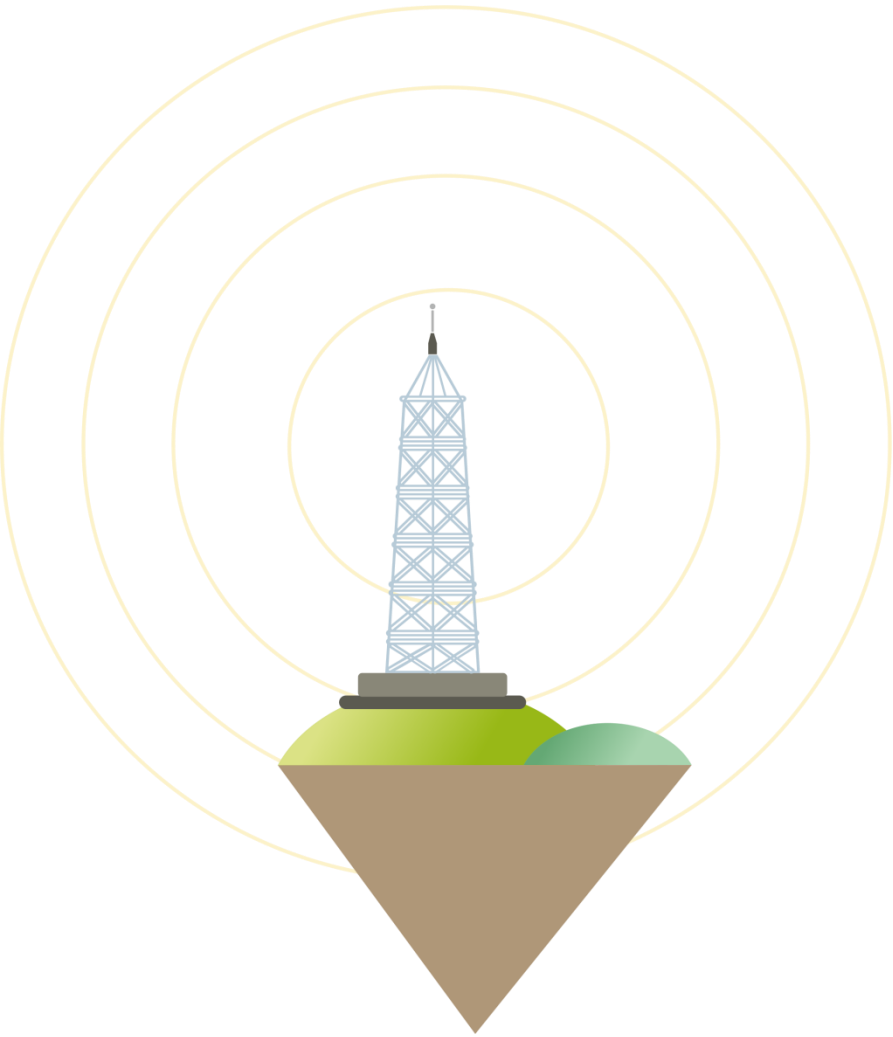


**Tool-1**





# Tool3



- Protocol for information flow and communication management
- What should be done?
- Who should do it?
- How to do it?



# Tool4



**Tool 4:** The Optimal Skill list for the **HWF Planning Committee:** Nine Optimal Core Competency Dimensions reflect the core competences and foundational skills desirable for professionals engaging in HWF planning in order to improve performance

**Tool type:** Skill list

**Target group:** decision-makers, Ministries or the HWF Planning Committee if applicable, the institution or competent authority responsible for HWF planning

**Benefit of the tool:** aims to improve the composition and performance of the HWF Planning Committee



Assess the Optimal Skills of the HWF Planning Committee. Do they match/achieve the Nine Optimal Core Competency Dimensions? Examine the gaps and attempt to ensure that the optimal skills are covered. Please mark 'Yes' by ticking the existing dimensions in the last column.



# Tool4

	Core Competency	Skill Description	
1.	Health Policy Development and Programme Planning Skills	monitor policy implementation, operations planning, implement strategy	<input checked="" type="checkbox"/>
2.	Legal Skills	legal terminology, legal studies	<input checked="" type="checkbox"/>
3.	Management Skills	management, problem solving	<input type="checkbox"/>
4.	Leadership and Systems Thinking Skills	leadership development, adapt to changes	<input type="checkbox"/>
5.	Communication Skills	share information, information and communication, manage electronic information	<input type="checkbox"/>
6.	Analytical and Data Assessment Skills	time series analysis, surveying, development of statistical methods, mathematical statistics, statistical forecasting	<input type="checkbox"/>
7.	Health Informatics Skills	web application/software development	<input type="checkbox"/>
8.	Financial Planning Skills	financial planning, financial analysis, budget design	<input checked="" type="checkbox"/>
9.	Labour Force Intelligence Skills	labour market economics and policies, educational issues	<input checked="" type="checkbox"/>



# Tool4



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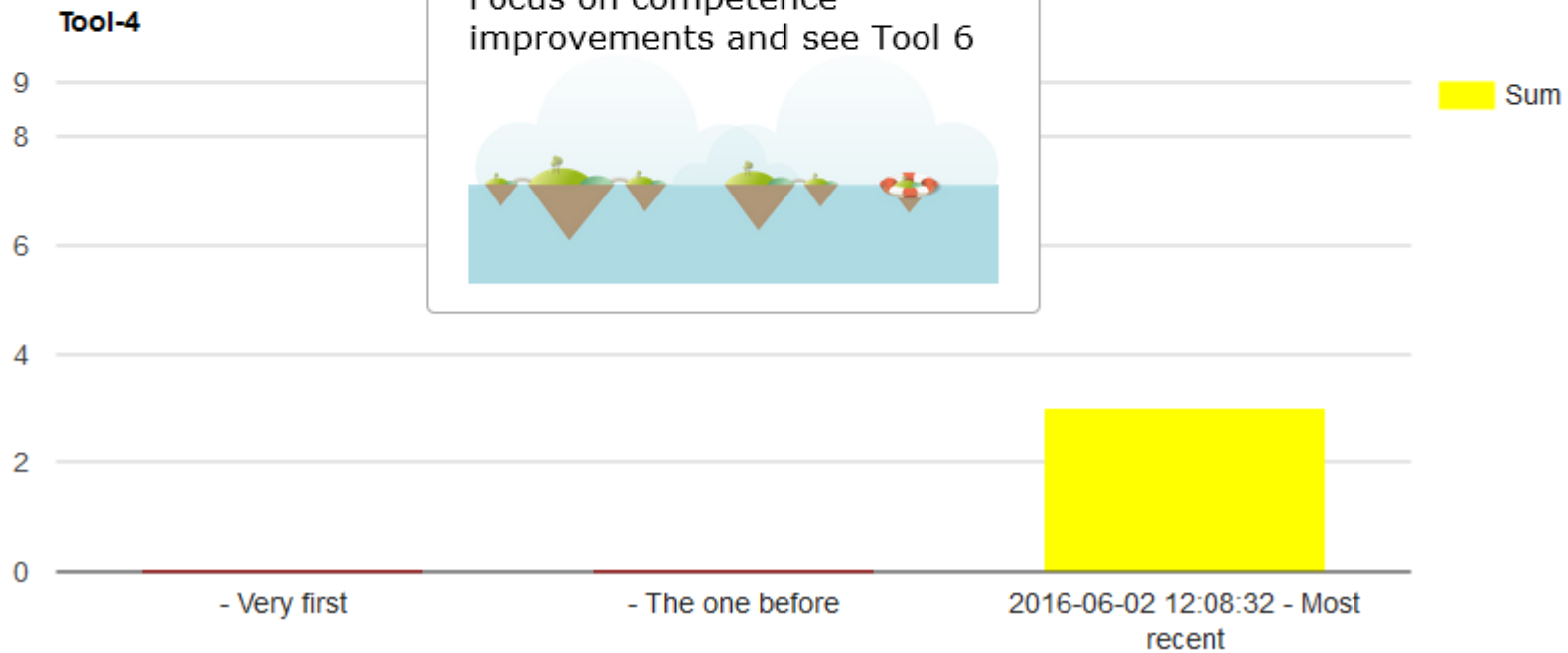
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# Tool5




**Tool 5:** The **Stakeholder coverage evaluation tool** - to carry out an evaluation of the national stakeholder network, to conduct analysis and ensure the setting up of collaboration by a national-level HWF planning network.

**Tool type:** Checklist

**Target group:** HWF Planning Committee if applicable, institution/authority responsible for HWF planning or Ministry

**Benefit of the tool:** supports national stakeholder analysis for strengthening and assessing the national HWF planning stakeholder network



Please consider the followings when creating, assessing, managing and strengthening the HWF Planning stakeholder network. Please list each stakeholder separately. Consider the following dimensions for each stakeholder and check for changes regularly. Apply the tool for each separate stakeholder.



# Tool5

**Instruction:**

Consider the followings when creating, assessing, managing and strengthening the HWF Planning stakeholder network. Please, list each stakeholder and consider separately the following points.

NAME OF STAKEHOLDER	YES	NO
1. Willingness to collaborate		
2. Stakeholder motivation		
3. Stakeholder expertise		
4. Stakeholder power		
5. Stakeholder capacity		



# Tool5



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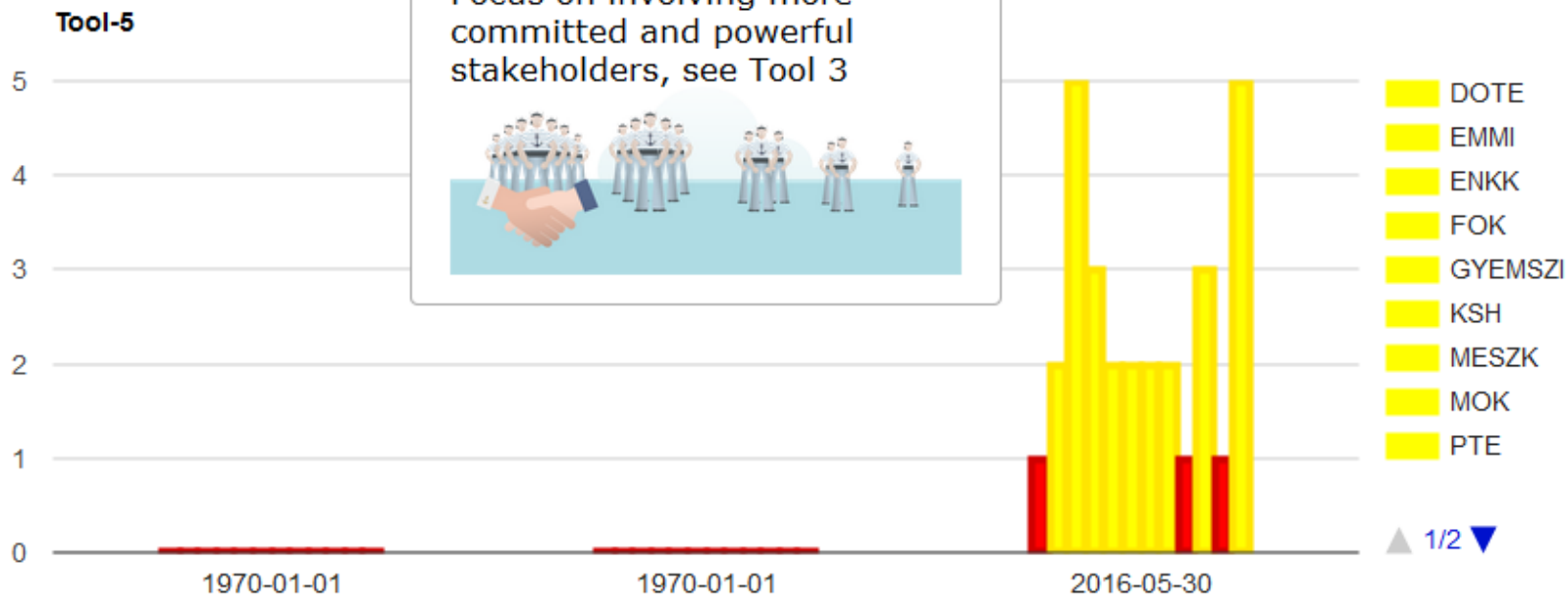
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**Captain Planning says:**

Focus on involving more committed and powerful stakeholders, see Tool 3



# Tool6



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**Tool 6:** The **Brief training outline**/minimum modules for the HWF Planning Committee: knowledge sharing and capacity building. The Brief training outline supports the development of and/or closes gaps in the skills and competences of the people responsible and involved in HWF planning (data providers and/or the members participating in the HWF Planning Committee).

**Tool type:** Guideline

**Target group:** HWF Planning Committee if applicable: institution/authority responsible for HWF planning, or Trainers, Experts in HWF planning

**Benefit of the tool:** aims to improve the composition and performance of the HWF Planning Committee



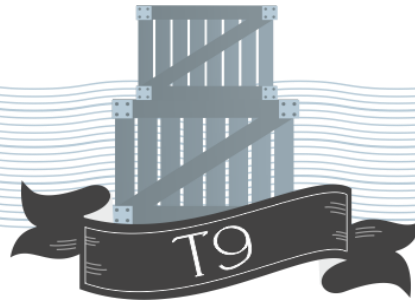
When creating and improving the composition and performance of the HWF Planning Committee or when organising training programmes for people involved in HWF planning, please consider the following Modules.

Tailored programmes are necessary in HWF planning performance

- Module 1: Strategic thinking and Programme planning
- Module 2: Data collections and Epidemiology
- Module 3: Data analyses and Evidence-based interventions
- Module 4: Health Policy and Management
- Module 5: Communication and Coordination



# Tool9




**Tool 9:** The **Database maintenance and development tool** - In order to increase data quality and set up more comprehensive collections of HWF planning data, Tool 9 presents several steps for improving the “State of data” and to overcome data gaps. It summarises the PHASES of improvement and overcoming gaps regarding the “State of data”.

**Tool type:** Rating scale

**Target group:** HWF data collector and analyst, HWF Planning Committee if applicable, institution/authority responsible for HWF planning

**Benefit of the tool:** aims to improve HWF planning data collections, increase data quality



Test your HWF planning data. Please score your current data process if you have already completed the following, or indicate which PHASE you are in by picking one PHASE in each row



# Tool9



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	PHASE 1	PHASE 2	PHASE 3	PHASE 4
Timeliness/Punctuality	No updated database <input type="radio"/>	Annual/Regular updates <input checked="" type="radio"/>	Real time/Up-to-date datasets <input type="radio"/>	<b>Integrated Health Information Management System</b> <input type="radio"/>
Availability/Accessibility	No data/Non-accessible data <input type="radio"/>	Aggregated datasets/Yearly time series <input type="radio"/>	Individual data <input type="radio"/>	
Accuracy/Validity /Reliability	No accurate data <input type="radio"/>	Estimates/Sample based data/Convenience sampling <input type="radio"/>	High accuracy <input type="radio"/>	
Completeness/Consistency	No complete/consistent database <input type="radio"/>	Modifying data collections <input type="radio"/>	Triangulated data collections <input type="radio"/>	
Comprehensiveness	No comprehensive data <input type="radio"/>	Data source linking <input type="radio"/>	Single ID integrated data warehouse <input type="radio"/>	



# Tool9



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**Warning** ✕

Time is floating so updates are necessary for your databases



	PHASE 1		PHASE 3	PHASE 4
Timeliness/Punctuality	No updated database <input checked="" type="radio"/>		Real time/Up-to-date datasets	<b>Integrated Health Information Management System</b> <input type="radio"/>
Availability/Accessibility	No data/No accessible data <input type="radio"/>		Individual data	
Accuracy/Validity/Reliability	No accurate data <input type="radio"/>		High accuracy	
Completeness/Consistency	No complete/consistent database <input type="radio"/>		Triangulated data collections	
Comprehensiveness	No comprehensive data <input type="radio"/>	Data source linking <input type="radio"/>	Single ID integrated data warehouse <input type="radio"/>	



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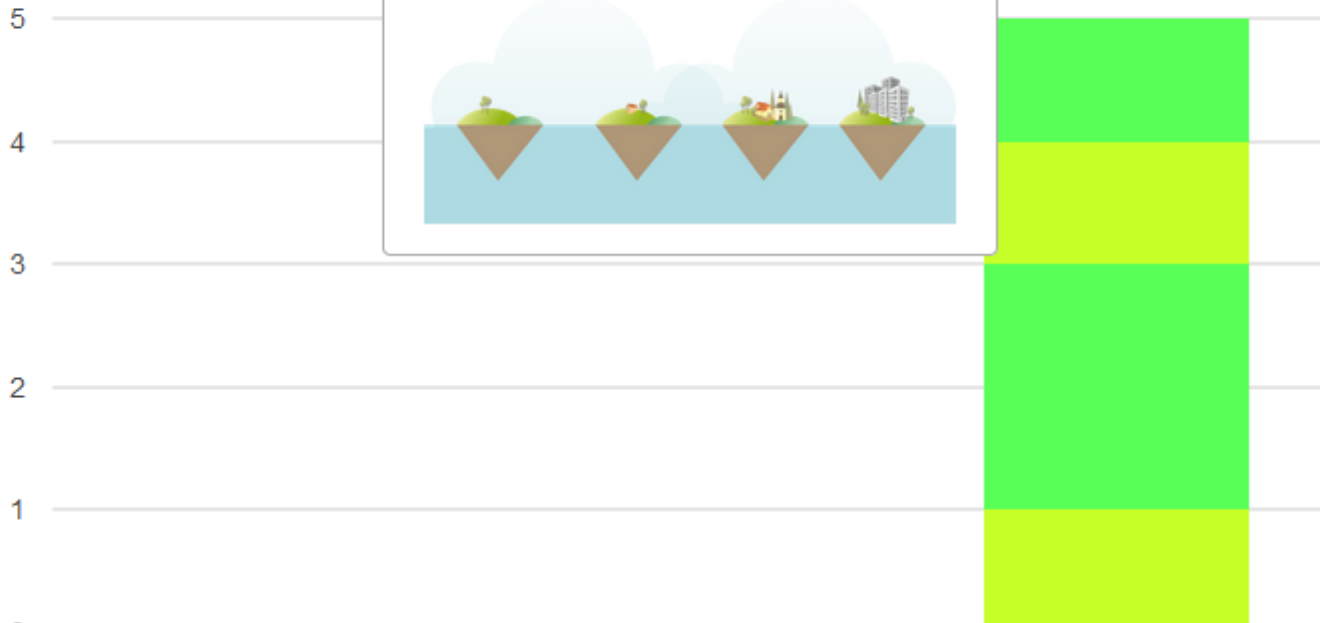


**Captain Planning says:** ✕

Focus on building up better  
data collections and databases



**Tool-9**



# Tool10

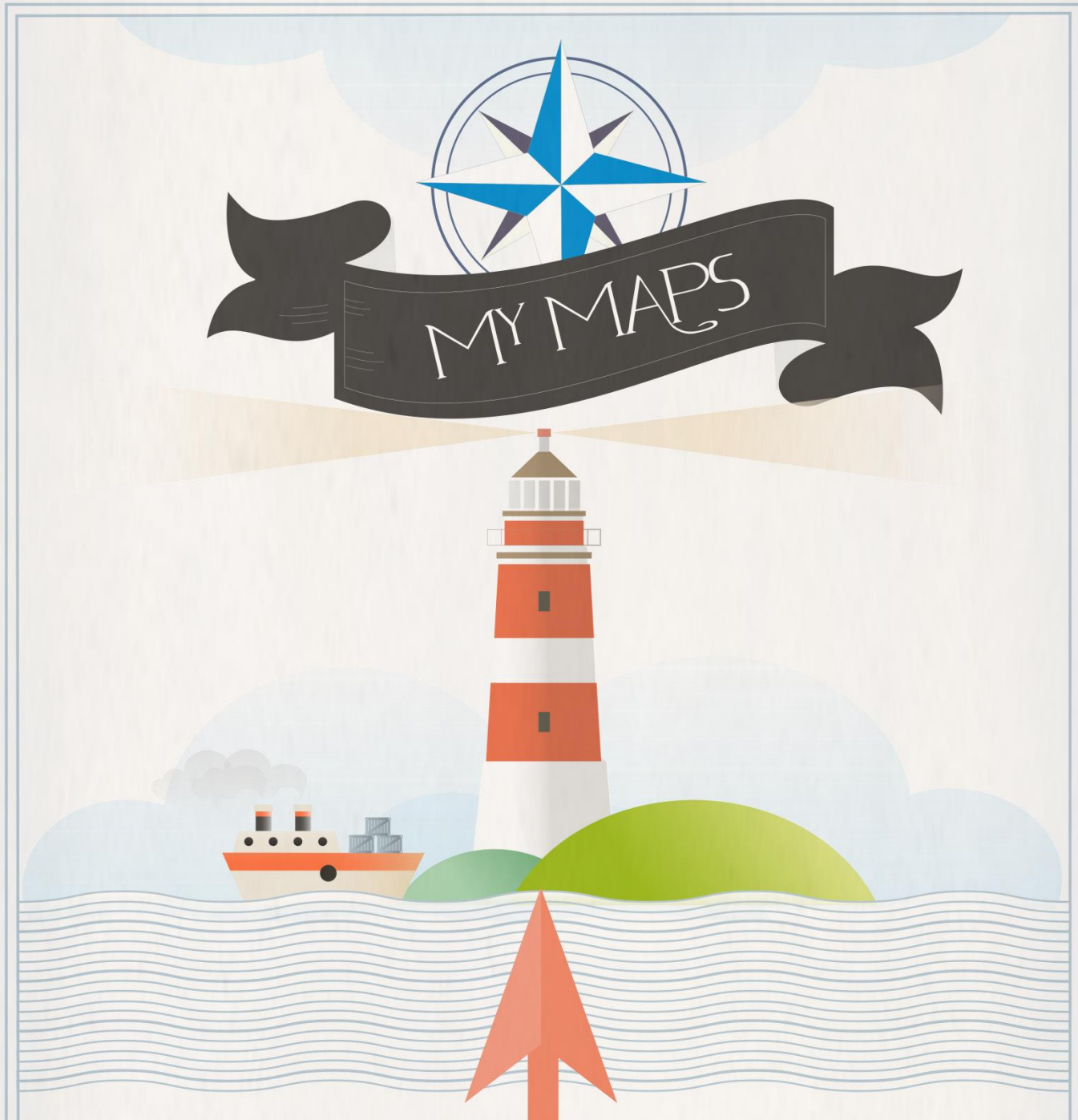


## Quick start table: Selecting the right method for you

Choose what you would like to do	Method section
Identify people to be involved in your project.	3.1 Identifying stakeholders and experts
Understand what information already exists on a workforce topic.	3.2 Literature review
Interview stakeholders and experts to obtain a deeper understanding of a workforce topic.	3.3 Interviews
Collect qualitative or quantitative information from a defined group.	3.4 Surveys
Investigate plausible futures.	3.5 Scenarios
Quantify scenarios or uncertain variables.	3.6 Delphi exercises



Fellows, J. and Edwards, M. (2014)  
User guideline on qualitative  
Methods in HWF planning and  
forecasting



MY MAPS



# My map



# Thank you for your attention.

Further information:

<http://hwftoolkit.semmelweis.hu>

<http://semmelweis.hu/emk/en/>

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