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| **Category** | **Question** | **Yes** | **No** | **Evidence/Action Required** |
| **Vision and Future Direction** | Do you know what outcomes the Health and Social Care Partnership is working towards as stated in the strategic commissioning plan? |  |  |  |
| Are you aware of the Partnership’s vision and priorities over the next 6 years? |  |  |  |
| Does the Partnership have adequate mechanisms in place to enable it to make strategic decisions about its workforce? |  |  |  |
| Is your workforce most effectively deployed to meet your strategic priorities? |  |  |  |
| At a corporate level is there shared ownership and promotion of a systematic, integrated approach to all resource planning including planning for the workforce? |  |  |  |
| Do you know what services the Partnership will deliver over the next 6 years? |  |  |  |
| Are you aware of the implications of the Partnership’s future plans for your service? |  |  |  |
| Does your business unit plan identify the workforce implications of your aspirations? |  |  |  |
| Are you clear about the Partnership’s organisational culture and values in relation to its workforce? |  |  |  |
| Have you identified or are testing any potential future business models for your service? e.g. Buurtzorg, Nuka models? |  |  |  |
| Have you assessed the risks and other implications for your workforce of each of these business models? |  |  |  |
|  | Do you know what workforce will be necessary for each of these business models in terms of:  • Numbers;  • Job roles;  • Skills;  • Productivity levels? |  |  |  |
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| Are you clear who will deliver services in the future? |  |  |  |
| Have you involved relevant internal and external stakeholders such as;  • communities;  • the 3rd sector;  • other partnership services;  • the private sector  • other  in planning for your workforce? |  |  |  |
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| Have you aligned your workforce planning to reflect changed priorities such as tackling inequalities, moving to prevention and early intervention and person centred planning? |  |  |  |
| If workforce reductions are anticipated, have they been designed to ensure business continuity and critical skills retention? |  |  |  |
| **Integration of**  **workforce**  **planning with**  **other strategic**  **and financial**  **planning**  **processes** | Has the Partnership integrated and aligned workforce planning with the wider planning process? |  |  |  |
| Are plans for the future workforce given the same priority and attention as plans for other resources such as finance, ICT, assets etc.? |  |  |  |
| Are the necessary information systems, processes, documentation etc. for resource planning standard, consistent and integrated? |  |  |  |
| Do your internal policies and processes reflect the fact that workforce planning needs to be a continuous process? |  |  |  |
| Is there shared responsibility within your service for workforce planning that involves relevant support services such as HR, Finance, ICT etc.? |  |  |  |
| Is your service senior management actively committed to an effective workforce planning process? |  |  |  |
| **Workforce**  **supply/sources of**  **workforce** | Are your information systems sufficiently compatible and integrated to allow you to easily access data to analyse and report on your workforce? |  |  |  |
| Has your Partnership identified meaningful performance indicators for its workforce? |  |  |  |
| Are performance indicators regularly updated and used to inform plans for the workforce? |  |  |  |
| As a manager do you have access to all necessary up-to-date information relating to your workforce including:  • Staffing cost;  • Contract mix;  • Age profile;  • Skills level;  • Turnover;  • Employee satisfaction? |  |  |  |
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| Do you use the information available to make decisions to ensure your workforce continues to reflect your business needs? For example, do you track the likely workforce available to you over time taking account of:  • Turnover;  • Retirals;  • Promotions;  • Ill health:  • Skills mix? |  |  |  |
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| Does your service integrate workforce data with other management information to inform service planning and day to day decision making? |  |  |  |
| Have you identified and assessed factors in the external environment that may impact on your future business plans, for example, are there plans for a major employer to move into or expand in your area that may impact on your ability to recruit your target workforce? |  |  |  |
| Have you identified the skills and capabilities of your current workforce? |  |  |  |
| **Performance**  **management** | Do you manage and monitor performance effectively and know how your service delivers on outcomes? |  |  |  |
| As a manager are you aware of your responsibilities in terms of the performance and productivity of your workforce? |  |  |  |
| Do you know what levels of efficiency and productivity are required by your service? |  |  |  |
| Do you make connections between the performance of your workforce and your Partnership’s success? |  |  |  |
| Do you have systems in place to measure and evaluate performance and productivity? |  |  |  |
| Do you take remedial action to address unsatisfactory performance and productivity, for example, disciplinary procedures, mentoring, coaching, training and development etc.? |  |  |  |
| Have you identified the skills and capabilities that will be necessary to achieve future business objectives? |  |  |  |
| **Developing**  **strategies** | Is the current design and structure of your Partnership appropriate for future needs including spans of control, leadership and management and succession arrangements? |  |  |  |
| Does your Partnership have processes in place to capture, aggregate and action the overarching workforce priorities at an organisational level? |  |  |  |
| Are you clear about the political appetite for changed ways of working including shared service opportunities? |  |  |  |
| Do the Partnership’s policies and procedures that relate to the workforce help deliver outcomes and support future business objectives? |  |  |  |
| Are you able to prioritise and address both short and long term workforce requirements within your service? |  |  |  |
| Has your Partnership addressed broader management issues as a way of improving organisational performance, for example, through:  • Exploiting technology;  • More effective use of job design;  • More effective use of organisation  design;  • Flexible skilling and deployment of the workforce;  • Agile and mobile working;  • Better management including appraisal;  • Better performance management?  • new models of service delivery such as self-organising teams? |  |  |  |
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| Is HR considered to be a strategic partner in developing solutions to support the achievement of service objectives? |  |  |  |
| Does your Partnership ensure that the workforce is effectively engaged in service improvement planning initiatives? |  |  |  |
| **Monitoring and**  **evaluation** | Has the Partnership developed mechanisms to monitor and report on the implementation of workforce initiatives? |  |  |  |
| Do the senior management team periodically evaluate the extent to which the planned outcomes for the workforce have been achieved within the service? |  |  |  |
| Do you assess the impact of the strategies you have put in place to address your workforce issues? |  |  |  |
| Do you monitor the effectiveness of training and development against service outcomes? |  |  |  |