

**Workforce Planning process 2015/16**  
**Confirm and Challenge Guidelines**

*Health Education North West will contact providers from 1<sup>st</sup> July 2015 to 16<sup>th</sup> July 2015 – to review the submission made. Below is a summary of some of the enquiries which will be made. This is not an exhaustive list – and will largely depend on the quality of the submission and triangulation against other intelligence (e.g. previous years submission/Monitor/TDA operational plans etc.) – however it can be used as a guide to review the submission before final sign-off on the 17<sup>th</sup> July 2015. Thank You.*

**1. Overall check for completeness**

<ul style="list-style-type: none"> <li>• Check for blank cells in all sections of the demand template – blank cells/null entries cannot be considered as ‘zero’ – and this will be queried.</li> </ul>
<ul style="list-style-type: none"> <li>• Check for blank submissions in the narrative section (We would expect these to be completed in advance of the 17<sup>th</sup> July 2015) – or select non applicable, if it does not relate to the services your Trust provides.</li> </ul>
<ul style="list-style-type: none"> <li>• Has the plan been discussed with other providers (e.g. Social Care, other NHS providers)?</li> </ul>
<ul style="list-style-type: none"> <li>• Has the plan been signed off? If not, is there any email evidence (sent through to <a href="mailto:workforceplanning@nw.hee.nhs.uk">workforceplanning@nw.hee.nhs.uk</a> that the plan was signed off or taken to board meetings?</li> </ul>
<ul style="list-style-type: none"> <li>• As part of the signoff process, did the trust submit any workforce strategy/learning development plans and/or the 1 years strategic plan. E.g.: These should be sent through to <a href="mailto:workforceplanning@nw.hee.nhs.uk">workforceplanning@nw.hee.nhs.uk</a></li> </ul>
<ul style="list-style-type: none"> <li>• Check the comments section on each staff group line for any indications of how the demand has been calculated – or if there is any key information shared to indicate any changes in the demand figures.</li> </ul>

**2. Demand Template**

The table below outlines the checks required for standard template columns across all areas of the demand template.

Data entry will be triangulated with last years (excel) submission – if there are no comments or related information in the narrative submission, then you may be required to provide more detail.

<b>Column(s)</b>	<b>What will HENW be looking for?</b>	<b>Notes/Hints &amp; tips</b>
ESR baseline ‘v’ Staff in Post	Check the difference between ESR Baseline and Staff in Post. Any differences flagged in red text need to be queried.	Some differences may be due to data quality/coding issues. If you are looking at a subset of a staff group then remember to check high level totals which could indicate miscoding if high level figures for ESR baseline and staff in post-match.
Fill Rate (%)	If any % values are showing as red then the establishment value should be queried with the trust	Establishment value shouldn’t be lower than the actual staff in post
Demand Growth Tool (%)	If this column is populated, check the narrative for an explanation. Questions for the providers – How	We wouldn’t expect to see a flat growth across

	did you calculate the % figure? Why is it the same across the 5 years?	all 5 years in the demand template.
Forecast demand for 5 years	<p>These figures should be cumulative e.g. Staff In Post 31.03.15 plus any additional staff / or a reduction - query with provider.</p> <p>Sense check the data for oscillations and check through comments and narratives before querying with the provider.</p> <p>Look at year on year and overall 5 year &amp; growths to pick out any growth that looks odd</p>	Use the % growth values in spreadsheet
Forecast Fill rate	Any values in this column that less than 95% or greater than 100% should be checked against narrative and comments and then queried with provider	
Newly Qualified 5 Yr demand	<p>Use the Newly Qualified baseline data for 13/14 to sense check against figures submitted for each line of data.</p> <p>Also check the high level aggregates for the NQ demand.</p> <p>Check comments and narrative for additional information/intelligence before querying.</p>	<p>The figure in this column should be around 8-10% of the total staff in post for the staff group.</p> <p>When looking at the high level aggregate, the NW demand should be 6-8% of the total staff in post.</p> <p>The figures in this field may tell us more about the stability of this workforce and the age profile.</p>

### 3. Healthcare Scientists

The following additional checks should be carried out:

Column(s)	What should I be looking for?	Notes/Hints & tips
Staff in Post	Check the data in this column matches the data provided by HENW.	

### 4. Medical and Dental

The following additional checks should be carried out:

Column(s)	What should I be looking for?	Notes/Hints & tips
ESR Baseline	<p>Hosted staff should be recorded in the organisation they are working in and not the lead employer</p> <p>e.g. Pennine Acute should have a medical workforce which excludes all the M&amp;D trainees</p>	<p>Check the lead employers</p> <p>These trusts should not have inflated Medical workforce numbers</p>
5 year forecast demand	<p>Any reductions in the Consultant workforce across all specialities need to be investigated.</p> <p>Check narrative/comments before contacting provider.</p>	
	At a NW/LWEG level, check the speciality CCT outturns against the year on year demand and	Compare against CCT outturns data

	against the NQ demand section	
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## 5. Additional Demand Template

The following additional checks should be carried out:

Check the workforce planning inbox for excel template submission and update tracker
Cross check the demand with Education Commissioning team

## 6. Narrative Template

Column(s)	What should I be looking for?	Notes/Hints & tips
General	Sense check the sections marked as 'N/A' against the narrative submission table Have the prompt questions been addressed in each narrative section?	
Primary and Community Care	Have the following areas been mentioned? <ul style="list-style-type: none"> <li>• Health Visitors</li> <li>• School Nurses</li> <li>• District nurses</li> </ul>	
Emergency Care	Have the following areas been mentioned? <ul style="list-style-type: none"> <li>• 24/7 care</li> <li>• Physician Associates</li> <li>• International Recruitment</li> <li>• NWAS</li> <li>• Paediatric A&amp;E (Alder Hey)</li> <li>• Devolution Manchester</li> </ul>	
Mental Health	Have the following areas been mentioned? <ul style="list-style-type: none"> <li>• Parity of Esteem</li> <li>• Learning disability</li> <li>• CAMHS</li> </ul>	
Nursing	Have the following areas been mentioned? <ul style="list-style-type: none"> <li>• Return to practice</li> <li>• Grow your own strategies</li> <li>• Jane Cummings – safer staffing</li> </ul>	
Public Health	Key workforce areas: <ul style="list-style-type: none"> <li>• TB nurses</li> <li>• School Nurses</li> </ul>	
Diagnostic & Scientific	Have the following areas been mentioned? <ul style="list-style-type: none"> <li>• Proton beam</li> <li>• Sonography</li> <li>• Endoscopy</li> </ul>	Proton beam at The Christies, Clatterbridge Centre and The Rosemere Centre at Lancs Teaching.