

Step 6

Business & Workforce planning toolkit

CWPC 2011

This toolkit is designed to support you to business and workforce plan for your organisation. It contains questions and points to consider for all areas of business and workforce planning. It was developed by using workforce and business planning guidance from national guidance and best practice in Coventry and Warwickshire.

The toolkit aims to complement any planning in your organisation currently, you can use the areas that are most relevant to you and your organisation.

There are two sections to the toolkit, business planning and workforce planning. The business planning section considers your organisation, aims for the year ahead, marketing and finance. This helps you to understand your current position and provides a foundation for your workforce plan.

The workforce planning section takes you through CWPC's 3 step workforce planning process.

- 1) what do you have now?**
- 2) what will you need in the future?**
- 3) how will you make the changes?**

Business plan

Writing a business plan will enable you to clearly set out your aims for the next 3-5 years, and plan how you will achieve these aims. The questions below give you some suggestions for what you might include in a business plan, and consider areas such as finance- to ensure that you cover the cost of achieving your aims, and marketing- how you will promote your business to customers.

The template below gives examples of the types of information that will be useful in a business plan, please read the questions and fill in the information for your organisation.

1. Your Organisation Understanding your organisation and what it offers will help you consider how best to promote it. Through personal budgets, customers will have more choice in where they purchase their support so you need to understand your customers to make sure your services will meet their needs.	
Points to consider	
Background information - who you are, what you do, what you can offer; brief history; plans for the future	
Structure of the organisation	

<p>Competitive advantage of your service- what makes you different to other organisations in your area? (eg mix of services, the way you work with customers, the way you train your staff)</p>	
<p>Demand- who are your customers, what is the demand for your services, are there other organisations in your area offering similar services?</p>	

2. Aims for the next 3-5 years

Think about the outcomes you aim to achieve over the next 3-5 years, be specific and make sure it's achievable.

(maximum of 6 aims, no more than 2 sentences per aim)

These aims will form the basis of the workforce plan, so they should be captured in the action plan at the end of the toolkit

Aims:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Points to consider

What could stop you achieving your aims?
(eg. Finances, staff, customers, working with other agencies?)

How will you measure if you have achieved your aims?
(e.g. increase in profit, customer satisfaction, increase in customer numbers, increase in staff morale)

<p>How will you manage any change with staff and customers? (e.g. how will you communicate any changes, will you involve customers and staff in decision making?)</p>	
<p>Will you need to change any of your policies (e.g. risk management, contracts, CRB checks?)</p>	

3. Marketing plan

Marketing is simply how you will promote your services and organisations in order to attract customers. Before personalisation local authorities may have bought services under a block contract; now there are more self funders and customers with personal budgets. This means you need to sell your service to your customers; consider how they will find out about you and why will they choose you over others.

By speaking to your current customers you can find out what types of service they may choose in the future. You should also work with your local authority to make sure they know about your service and their service brokers can inform and signpost customers to your organisation.

Points to consider

What are the different ways you can reach your customers and promote your services?
(eg websites, adverts, relationship with local authorities)

How can you attract new customers?

Feedback from current customers, what services do they want in the future?	

4. Financial plan

Changes in the way people use services will impact the way you manage your finances, so you will need to plan for these changes.

Your organisation may have to move from dealing with one or two main funders with guaranteed contract funding, to dealing with many different funding streams, each allocated to a specific client.

The questions below give you areas to consider to ensure that your finances are prepared for the changes to funding under personalisation

Points to consider

Will your budgets and forecasts cover your aims for the year?

How will you adapt to less certain funding- moving from block contracts to personal budgets? (eg what is your main source of income? Is this secure and sustainable?)

<p>How will you price your service to make sure you cover your full costs? (eg including management, facilities, training etc)</p>	
<p>Do you have systems in place (IT and payment systems) to be able to charge differently and take payments from lots of different customers?</p>	

Workforce plan

Once you have completed your business plan you should complete a workforce plan, which will sit alongside it.

The term 'workforce' means all your staff, and workforce planning covers all areas of staffing in the future- i.e. number of staff, types of role, training needed.

A workforce plan is a simple way of making sure that you have the right people in the right roles at an achievable cost. Most managers will already have to workforce plan- they know for example if someone is retiring then they will need to plan for their replacement. Workforce planning allows you to do this on a larger scale over a longer period of time, to ensure that your services are always well staffed.

1. What do you have now?

The first step in workforce planning is understanding your current workforce. The questions below allow you to record your current staffing levels and any issues you currently have.

Questions to consider:

What is your current workforce? (e.g. number of staff, job roles, age, gender, qualifications)

NB. This information is required for your NMDS return. Log onto NMDS website and update all your information. You can then print off a worker report which you can use for this section of the plan

<p>Do you have any issues filling vacancies?</p>	
<p>What is your current level of turnover? (number of leavers in the last year divided by total number of staff times 100. e.g. 5 staff left in the last year, total of 50 staff)</p> <p>Staff left = 5 Total staff= 50 $5 / 50 \times 100 = 10\%$ turnover</p>	
<p>Is there a high level of sickness absence in your organisation? (You can compare your levels against others on the NMDS)</p>	

2. What will you need in the future?

Using the aims from your business plan, consider what changes will need to be made to the way you work in the next 3-5 years. Personalisation, personal budgets, changes in population and the economy could all affect the way you provide services and it is important that you plan for these changes.

Questions to consider:

What activities will need to be carried out in the future?

How long will these activities take, and when will it take place (e.g. day and time)?

Will you need different working patterns?	
What roles will you need in the future?	

Will you need more or fewer staff to undertake these tasks? (i.e will you need to recruit or reduce your workforce?)	
What training/ skills will people need to undertake these tasks?	

3. How will you make the changes?

Having considered what is needed in the future it is now important to consider ways in which you can make these changes. The questions below should help you to think about the different ways you can make changes.

Areas to consider:

Number of people – how will you recruit new staff or reduce your workforce?

Consider the progression for staff through your organisation, how do you manage talent and plan for succession?

Roles- how will you make sure you have the right job roles?

How will you address any issues around filling vacancies, staff leaving and sickness absence?	
Training/ skills- How will you make sure that all staff are trained to carry out the work needed in the future?	

Working patterns (e.g. part time, evenings) how will you get staff to adapt to different ways of working?	
Questions to consider:	
Can you use new technology to support your workforce in the future? How would you access this?	
How could you improve the supply of workers e.g. linking with colleges, offering flexible working, promoting your organisation? Could you work with other organisations to share staff/ services?	
Can you redistribute tasks to different roles? (e.g. some tasks can be given to less qualified workers to reduce costs)	

Are there any external factors that could affect your workforce- e.g. changes to the population, competition for workers?	

4. Action plan

An action plan is important to capture all the work you need to do and make sure it is completed on time. Make sure you write all the changes you have identified in the sections above. Each action needs someone who will be responsible and a deadline to keep it on track. It is also important to plan at the start how you will know when you have completed it, so you can clearly show your progress.

Action (taken from your business plan and workforce plan)	What are the workforce changes?	How are you going to achieve the change?	Who is responsible for completing it?	How will you know when you have completed it?	Timescale
E.g. 1 Expand our service	Recruit more care workers	Advertise with colleges, promote our staff training	The manager	We will have recruited 5 care workers	In the next 12 months
2.					
3.					

4.					
5.					
6.					

Finally, you should put in a date to review both your business plan and workforce plan next year to monitor your progress and refresh your aims and actions.