

CARDIFF COUNCIL WORKFORCE PLANNING TOOLKIT



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modernisation, austerity and demand and alternative ways of providing services are being explored.

Workforce Planning is one of the key priorities within the workforce strategy which will enable the organisation to identify and understand the internal and external forces that impact on the organisation. Directorates need to determine their workforce needs to ensure that the Council has the right people with the right skills in the right place at the right time and at the right cost.

A continuing challenge for the Council and a priority for the Capital Ambition is the need to ensure that its workforce reflects the wider communities across Cardiff. This will ensure the continuing accessibility and quality of our services. In addition, as the current workforce is an ageing workforce, we need to increase employment opportunities for young people by promoting the council as a potential employer for school and college and university leavers setting out on their careers.

This workforce planning process aligns with the council's business and financial plans and helps service areas to evaluate their current workforce, ascertain their future requirements and assess the availability of resources. Service areas will then be in a position to develop their action plans to draw the information together in order to help them to bridge any gaps.

This Workforce Planning toolkit has been developed by the Workforce Planning Project Group in conjunction with Trade Unions and has been piloted within some of the Directorates represented on the group. It has been specifically designed as a practical guide to assist directorates with workforce planning.

It begins with setting out the rationale for workforce planning and the Council wide considerations that need to be addressed. It then provides some discussion points to help focus the work at both a directorate and team level and contains a suggested way forward to help Directorates start the process. There is also an example of a completed Action Plan as a guide for Directorates in developing their plans.

Your HR People Partner and the HR Organisational Development Team will be supporting you throughout this process.

Why Undertake Workforce Planning

Workforce Planning enables the organisation to align the needs and priorities of the organisation with those of its workforce to ensure it can meet its legislative, regulatory and service requirements and organisational objectives and priorities, including financial plans.

It is about deciding how many and what types of workers are required to ensure the right people with the right skills are in the right place at the right time and right cost.

It enables us to build capacity and capability within the workforce to meet future short term, medium term and long-term requirements.

- **STRATEGIC** – Director/Assistant Director led, looks ahead and plans for **long term** sustainability; includes Succession Planning and Scenario Planning

- **OPERATIONAL** – Service Manager led, focusses on service demand and supply and plans for the **medium term**

- **MANAGERIAL** – Line Manager led, plans for the **short term** and has a tactical focus dealing with immediate risks and issues

**Workforce
Planning**



RIGHT PEOPLE with the
RIGHT SKILLS in the
RIGHT PLACE at the
RIGHT TIME at the
RIGHT COST



The benefits of having a detailed workforce plan include:



Council Wide Considerations and Discussion Points

The **Workforce Planning** process starts with an 'informed discussion' taking place with the Chief Executive and the Senior Management Team based upon the direction set out by the Cabinet in the **Capital Ambition**. The focus of the discussion is on the workforce, its strengths and weaknesses, and how the Council will develop and utilise that workforce to deliver on the **Capital Ambition**. This discussion forms part of the **Business Planning** process and provides the foundations for the workforce plans. It enables the Council to avoid the pitfalls of short-term, quick fix thinking and helps to highlight the Internal and External context for the Council.

CURRENT STATE

What is the Council's **VISION** and its **PRIORITIES** to meet the **Capital Ambition** – including the purpose of the Council, who it serves and what are the areas of strength & weakness and what are the views of stakeholders.

What **SKILLS & KNOWLEDGE** do we currently hold? - Where are our strengths? Where are our weaknesses? What is the current diversity of our organisation? How well do we work within directorates and across the different directorates?

FUTURE REQUIREMENTS

What **KIND of COUNCIL** are we becoming? - What is the vision set out in the **Capital Ambition** for the Council in terms of its role in service delivery? What values will be central to this vision?

What **PEOPLE, SKILLS and WORK PATTERNS** will we need? - How will our demand for people be changing in terms of both numbers and skills? What kind of work patterns will best meet our service needs?

IDENTIFY THE GAP

How will we **SUPPLY the WORKFORCE** needed to deliver the **Capital Ambition**? – Is the workforce out there to meet our changing needs and those of our delivery partners? How will they be attracted, retained and developed to deliver and support services?

What will we **COMMIT to do for our workforce and what do we EXPECT** from them? – How do we expect employees and everyone connected with the Council to behave? How does the workforce need to change and develop to enable the organization to deliver the **Capital Ambition**?

How will we **LEAD and MANAGE** ourselves through change? - What will our managers need to do? Do they have the capability to do it? Do we have a clear approach to **managing change** and the resources to implement it?

Directorate Workforce Planning Discussion Points

Current State

Analyse your current workforce assessing their knowledge and skills and their ability to deliver new and improved services now and in the future.

Discussion Points

What Knowledge, skills and capabilities currently exist?

What roles and capabilities are most critical?

How do you plan to fill these roles?

What workforce does your medium term financial plan allow for?

Future Requirements

Consider the future Workforce Requirements in the:

Short term (managerial 12-18 months)

Medium term (operational 18months – 3 yrs)

Long term (strategic 3yrs +)

Discussion Points

Are there any knowledge and skills gaps?

What are the most important skills and capabilities needed going forward? e.g. Welsh Language, Digital Skills

What new skills will be required going forward? e.g. Digital Skills

What are your critical people issues? e.g. Recruitment & Retention, Succession Planning

How will you develop staff going forward? e.g. Apprenticeships & Traineeships

Can the external employment market provide necessary resource with appropriate skills, knowledge and qualifications?

What is the GAP

Once the Organisation has an understanding of the current workforce, we can identify what the workforce needs to look like to deliver future services.

Discussion Points

Does your current structure support your service delivery objectives?

Does your current establishment support your objectives?

Any risks e.g. staff shortages, surpluses, PI targets, competency gaps and succession planning, etc.

Does your workforce plan reflect the diversity of the communities we serve as set out in the Capital Ambition?

Action Plan

A workforce plan that includes the organisation wide development requirements critical to driving and delivering future service delivery and business needs

Recruitment

Training &
Development

Retention

Resourcing
Strategies

Staff Consultation &
Engagement

Action Plan
Addressing
Priority
Areas

What action is required?

How will it be
achieved?

When is the review
date?

Who is the responsible
officer?

How/ where will
progress be
monitored?

Suggested Way Forward

This guide can be adapted as necessary within your Directorate.

The main stages that need to take place are:

- Analysis of your existing workforce to identify their knowledge, skills, abilities and areas of expertise
- Identification of Directorate workforce requirements going forward. Focus on the next year (which we refer to as the short term) and further ahead over the next few years (which we refer to as the medium term)
- Identification of the gaps and potential risks, training needs, resourcing requirements including any issues etc.

Hold a Workshop including the Director, Senior Managers and Service Managers and your HR People Partner and a member of the HR Organisational Development Team. Outline the context that you are currently working in and provide a high-level overview. Decide how you are going to analyse the existing workforce, identify knowledge, skills, abilities etc. and the timescales for completion. Agree a date for the second Workshop, which allows enough time for managers to work with their teams. However, too much of a gap can result in a loss of momentum.



At the second Workshop, you may want to include any additional managers and officers who need to feed into your discussions and inform your Action Plan. Go through the feedback – this will then inform your Action Plan.



Note : Remember you can use the prompts on Page 9 of the toolkit to help you in your discussions.

You now need to create your Directorate Action Plan. To help you focus your plans, here are the key Priority Areas that need to be addressed:

- ❖ RECRUITMENT
- ❖ TRAINING & DEVELOPMENT
- ❖ RETENTION
- ❖ RESOURCING STRATEGIES
- ❖ STAFF CONSULTATION & ENGAGEMENT

Please contact your HR People Partner or a member of the HR Organisational Development Team with any queries or questions that you may have at any time.



Please see the following example of a completed Action Plan as a guide to assist you in developing your Action Plans

ACTION	HOW	REVIEW DATE	RESPONSIBLE OFFICER/S	PROGRESS UPDATES
<p>RECRUITMENT</p> <ul style="list-style-type: none"> ❖ Commence a recruitment campaign for specific vacancies, trades and professions to run throughout the summer ❖ Attend Job Fayres quarterly to promote the Council and Directorate jobs and specific vacancies 	<ul style="list-style-type: none"> ❖ A targeted Recruitment campaign promoting Council and specific vacancies e.g. Social Workers, Trades etc. ❖ Managers across the Directorate to attend Job Fayres to promote the Council and raise awareness of roles within the directorate 	<p>Autumn 2018</p> <p>Monthly</p>	<p>Directorate Managers</p> <p>Directorate Managers</p>	<p>Directorate Management Team</p> <p>Directorate Management Team</p>
<p>TRAINING & DEVELOPMENT</p> <ul style="list-style-type: none"> ❖ Undertake a skills audit across the Directorate by end of QTR 1 ❖ Design a mentoring programme across the Directorate by end of QTR 1 for roll out of a pilot in QTR 2/3 ❖ Arrange for all staff to attend and complete Digital Skills training by the end of QTR 2 	<ul style="list-style-type: none"> ❖ Managers to work with teams to identify their skills ❖ Work with People Partner and Cardiff Academy to develop a pilot programme ❖ All staff to book on training 	<p>End of May</p> <p>End of May</p> <p>End of August</p>	<p>Directorate Mangers and Team Leaders</p> <p>Directorate Management Team</p> <p>Team Leaders</p>	<p>Directorate Management Team</p> <p>Directorate Management Team & People Partner</p> <p>Directorate Management Team</p>

<p>RETENTION</p> <ul style="list-style-type: none"> ❖ Promote Post Entry Training opportunities at all team meetings throughout the year ❖ Review Directorate employee exit data on a quarterly basis to understand reasons for turnover – use this information to inform resourcing strategies and employee engagement activity ❖ Analyse Employee Survey responses to inform retention strategies for the Directorate 	<ul style="list-style-type: none"> ❖ Managers to actively promote training and encourage staff to identify appropriate courses ❖ DMT to look at this data and hold series of working group sessions with Team Leaders etc. to take this forward ❖ DMT to look at this to start discussion and then progress with Team Leaders 	<p>Quarterly</p> <p>Quarterly</p> <p>By-monthly</p>	<p>Managers and Team Leaders</p> <p>DMT, Managers and Team Leaders</p> <p>DMT, Managers and Team Leaders</p>	<p>Directorate Management Team</p> <p>Directorate Management Team & People Partner</p> <p>Directorate Management Team & People Partner</p>
<p>RESOURCING STRATEGIES</p> <ul style="list-style-type: none"> ❖ Work with Universities, Colleges and Schools throughout the year to promote the Council and Directorate specific jobs, roles and professions ❖ Arrange visits to specific groups to raise awareness of the Directorate and the Council ❖ Work with professional bodies to raise the profile and promote the Council as an employer of choice 	<ul style="list-style-type: none"> ❖ DMT and Team Leaders to develop programme in conjunction with ❖ DMT to identify a Lead Officer to take forward ❖ DMT to identify a Lead Officer to take forward 	<p>Quarterly</p> <p>End of June</p> <p>End of June</p>	<p>Team Leaders</p> <p>DMT</p> <p>DMT</p>	<p>Directorate Management Team</p> <p>Directorate Management Team</p> <p>Directorate Management Team</p>

STAFF CONSULTATION & ENGAGEMENT				
<ul style="list-style-type: none"> ❖ Review the results from the Employee Survey and share across the Directorate through Team Brief and hold follow up sessions to go through the results and seek employee views and input to address issues 	<ul style="list-style-type: none"> ❖ Team Leaders to cascade results through team briefings and DMT to hold Directorate wide workshops with managers and Ambassadors facilitating table discussions 	<p>Following publication of results and the cascade of results through team meetings</p>	<p>DMT, Managers and Team Leaders</p>	<p>Directorate Management Team</p>
<ul style="list-style-type: none"> ❖ Develop Directorate Ambassadors to act as an informal consultation group e.g. Hold monthly meetings with Directorate Ambassadors to inform and agree a programme of engagement activity for the year 	<ul style="list-style-type: none"> ❖ Director to meet with Ambassadors to open discussions and then wider DMT to meet with Ambassadors to enable wider discussions and inform the programme going forward 	<p>Quarterly</p>	<p>DMT</p>	<p>Directorate Management Team and Update to SMT</p>
<ul style="list-style-type: none"> ❖ Hold 2 Directorate-wide engagement events per annum 	<ul style="list-style-type: none"> ❖ Managers and Team Leaders to work with DMT to hold these events 	<p>Quarterly</p>	<p>Managers and Team Leaders</p>	<p>Directorate Management Team & People Partner</p>
<ul style="list-style-type: none"> ❖ Promote and support all Corporate Health & Wellbeing initiatives 	<ul style="list-style-type: none"> ❖ All Mangers and Team Leaders to raise awareness within their teams 	<p>In accordance with H&W annual events calendar</p>	<p>DMT, Managers and Team Leaders</p>	<p>Directorate Management Team</p>

