



# Executive Summary

## Workforce Planning

This **Executive Summary** will provide you with a concise summary of the key information contained within this segment. It aims to assist you in instigating internal discussions, learning workshops and action plans, to not only help you to understand your current ESR usage, but to also equip you with the knowledge of the complete ESR solution, and how its functionality can support you in meeting your business challenges.

The draft **National Health & Social Care Workforce Strategy**, the first for 25 years, proposes a set of principles for future NHS workforce decisions, which aim to mitigate the risks associated with workforce planning. The strategy builds upon the NHS Five Year Forward View; identifying where local and national organisations are expected to carry out workforce impact assessments to help ensure “workforce competencies, skills and training as well as numbers are considered early in the planning phase”.

The **ESR solution provides all of your workforce information as the single source of truth**, providing you with essential HR, and Learning and Development information to support local strategy and planning, along with key functionality to help you both attain and monitor compliance and talent management capabilities. Having access to this range and depth of key information is essential to assist you in understanding your workforce and how it currently meets the demands of the service, enabling you to identify your workforce challenges ahead and allow you to plan to meet future demands.

### Business Challenges

**The following key questions will assist you in appraising your current workforce business intelligence; and importantly, all are directly supported by using ESR.**

1. Do you fully understand your workforce demographics and does your workforce reflect the population that you serve?
2. Have you got a good understanding of the external environment, both at a local level and national level, for example around the labour market and educational outputs?
3. Where do you recruit from, and where do your employees go when they leave?
4. Do you know the precise number of current vacancies, turnover etc.?
5. How good is the quality of your data?
6. How do you monitor your current and future requirements for competencies and skills for your staff?
7. How does your Workforce Validation Engine (WoVen) compare with other organisations?
8. How are you reporting on compliance to the Board?
9. What tools are you using for effective workforce planning?
10. How do you ensure your recruitment strategy meets the workforce and service demand of the future?
11. Are you able to effectively future proof your education offering to meet the skills required of your future workforce?

### How can ESR support effective workforce planning?

**ESR supports organisations by being a key enabler to maximise system productivity and efficiencies at a local, regional and national level.**

#### Organisation & Regional perspective:

- Ability to report on a wide range of workforce intelligence using the ESR Business Intelligence reporting tool.
- Ability to mobilise workforce information to respond to regional STP plans.
- Ability to improve data quality across your organisation through increasing the visibility of information via the ESR portal and Self Service functionality
- Ability to access the learning compliance of your workforce, to proactively respond and plan your education offering to meet the needs of your workforce and your service.

#### National perspective:

- Supports the NHS Five Year Forward View in supporting a modern workforce through effective workforce planning.
- Supports the draft National Health and Social Care Workforce Strategy in helping organisations to ensure ‘workforce competencies, skills and training as well as numbers are considered early in the planning stage’
- ESR workforce data is automatically made available for national reporting through the ESR Data Warehouse, thus reducing organisations’ national reporting requirements.
- Supports Carter recommendations for effective use of workforce intelligence.

## Talk with your regional NHS ESR Account Manager or ESR Functional Advisor

The NHS ESR Programme Team is here to support and guide you with the ESR workforce solution.

- Use this tool as a guide for your meetings/learning workshops
- Offer advice and support on all ESR functionality
- Produce your **ESR Annual Statement**, which gives you an assessment of your current ESR usage, including recommendations for system optimisation.

## How can ESR help me in meeting the financial challenge?

Greater efficiencies are possible through full implementation of the ESR system. By maximising your use of specific ESR functionality your organisation you will gain greater efficiencies across the whole solution, which will in turn benefit the whole of the organisation and your workforce.

ESR is centrally funded for all NHS organisations.

The implementation of a suite of the following functionality: OLM, competences, establishment control, and talent management gives you the ability to realise a number of financial benefits including:

### Cost Improvements:

- Savings can be made by fully utilising learning compliance.
- Reducing agency spend when a consistent workforce can be planned in advance.
- Reducing centralised reporting by using the Self Service portlet and Managers dashboard.
- Enabling vacancies to be identified in a more timely way to help speed up recruitment.
- Helping reduce sickness absence by entering data into ESR for sickness monitoring and delivering early interventions.
- Reducing classroom based training, through the implementation of e-Learning and access to over 800 national e-learning courses.
- Removing the need for any 3rd part Learning Management Systems and appraisal systems, with the potential for additional direct costs, as ESR has a fully integrated Learning Management System which includes the recording of classroom and e-Learning offerings.

### Service Improvements:

- Improved employee engagement and data quality by giving employees' access to ESR Self Service - so they can quickly identify what actions they need to take (i.e. learning, appraisal etc.).
- Opportunity to reduce the need for journal adjustments in the general ledger during month-end reconciliation when using establishment control in ESR.
- Improved planning within budgeted establishment.
- Improved workforce empowerment by giving managers access to information that better informs their decision making.
- Increased levels of assurance that the right people are in the right positions.
- Improved talent management across the organisation from use of competencies and appraisals.
- Improved data quality by using WoVen (Workforce Validation Engine) reports in Business Intelligence.

## What do I need to do?

### Evaluate...

The following questions will help you to evaluate how you use ESR to support effective workforce planning:

- Do I understand how to get the required information from ESR to assist me in our Workforce Planning?
- Do I know what my retirement rates are against skills, disciplines?
- Is ESR considered as part of our organisation's business planning?
- Do I know where my vacancy gaps are?
- Has our organisation completed an analysis of starters and leaver trends?
- How does our organisation manage talent and succession planning?
- Do we use ESR BI reporting to identify our skills gaps?
- What do I consider to be the current challenges in delivering against our workforce planning agenda?

For more questions, click on 'Start a Conversation' icon within the Workforce Planning segment of the Discover Your ESR tool.

### Consider...

Consider how the use of ESR and its workforce intelligence can support effective workforce planning in the wider NHS landscape;

- Is our workforce planning strategy in line with our region's STP?
- Are all our back office functions utilising ESR effectively to ensure we have sufficient and accurate workforce intelligence?
- Are we utilising ESR Self Service to improve overall workforce data quality?
- Are we fully utilising ESR workforce intelligence to respond to change service needs?

### Take Action...



Meet with your Recruitment Manager



Meet with your L & D Manager



Meet with your HR Director / Head of Workforce / ESR Lead



Meet with your Finance Lead

For a suggested list of questions and subject areas for discussion, please re-visit the Discover Your ESR tool.

## How to achieve maximum efficiencies

Understanding the connectivity of all the functionality within your ESR, will help you identify how you can make the workforce management solution work for you in order to meet the business challenges of effective workforce planning. By utilising all the functionality you will gain maximum benefits to your back office functions, enabling your managers and your workforce to achieve overall benefits to them and to the organisation. To gain a greater understanding of how to fully optimise the solution, click on the 'System Optimisation' icon within the Workforce Planning segment in the Discover Your ESR tool.

