



## START A CONVERSATION



Workforce  
Planning

### Evaluate...

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

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

### Consider...

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

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

### Take Action...

**To help you formulate a clear plan of action that supports your workforce strategy and planning we recommend you initiate the following;**



**Arrange a meeting with your Recruitment Manager.**

Key questions:

1. What are our current vacancy gaps and how are we using ESR to identify these?
2. Does your recruitment team understand our workforce planning strategy?
3. How do you manage recruitment costs? Is funded establishment recorded in ESR to support effective recruitment?
4. Us your recruitment team using the pre-hire IAT Authority Transfer to reduce time-to-hire?
5. Are all our back office functions utilising ESR effectively to ensure we have sufficient and accurate workforce intelligence?
6. Are we utilising ESR Self Service to improve overall workforce data quality?
7. Are we fully utilising ESR workforce intelligence to respond to change service needs?

To assist you in formulating your next steps, we recommend that you contact your NHS ESR Account Manager or Functional Advisor who can undertake your **Annual ESR Assessment** with you. This will give you, your leadership teams and operational leads a detailed ESR Annual Statement, which provides an in depth analysis of how you are utilising ESR, including usage statistics across the full solution; and what is the potential for expanding your use of ESR functionality to support you in meeting your organisational needs.



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Workforce Planning

### Take Action...

To help you formulate a clear plan of action that supports your workforce strategy and planning we recommend you initiate the following;



#### Arrange a meeting with your Learning and Development Manager.

Key questions:

1. Do we have sufficient knowledge of the OLM and competence offering in ESR?
2. What is our current OLM and competency usage?
3. Have we fully explored and evaluated the ESR Learning and Development functionality?
4. Can we identify the skill compliance of our workforce?
5. Do we use ESR to monitor compliance of occupational skills and training?



#### Arrange a meeting with your HR Director / Head of Workforce / ESR Lead.

Key questions:

1. How does ESR fit into our workforce planning strategy;
2. Are we maximising the data held within ESR to help formulate the workforce planning strategy?
3. Is our workforce planning strategy in line with our region's STP?
4. How are we maximising ESR to help with retention of employees?
5. Have we looked at how ESR can support our cost improvement plans with more efficient back office processes?
6. Are we maximising our utilisation of ESR to benefit our workforce?
7. Are all our corporate functions using ESR? If not, what is our plan to achieve this?



#### Arrange a meeting with your Finance Lead.

Key questions:

1. Are you confident that the financial ledger is aligned to ESR to help reduce journal adjustments on a monthly basis?
2. How do we ensure our financial data matches other workforce related data?

Introducing an ESR steering group provides a structured and open platform to discuss how ESR is utilised across the organisation and how the system can be fully optimised to gain maximum efficiencies. Regular dialogue with your professional ESR users and senior staff within your organisation can help you to formulate what the business plan will look like over the next 12 – 18 months and how ESR can support you with this.

To assist you in formulating your next steps, we recommend that you contact your NHS ESR Account Manager or Functional Advisor who can undertake your **Annual ESR Assessment** with you. This will give you, your leadership teams and operational leads a detailed ESR Annual Statement, which provides an in depth analysis of how you are utilising ESR, including usage statistics across the full solution; and what is the potential for expanding your use of ESR functionality to support you in meeting your organisational needs.