

Rural Health Workforce Planning: Instructions for 'Manual' Workforce Planning Spreadsheet

July 2007

These Instructions have been developed by Infohrm Pty Ltd (www.infohrm.com) as a deliverable within the Department's Rural Health Workforce Planning project. They supplement the *Rural Health Workforce Planning Guidelines* document published by the Department of Human Services in September 2006.

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Introduction

These *Instructions* assist you to undertake workforce demand and supply forecasting, and gap analysis. They should be read *after* you have read the *Rural Health Workforce Planning Guidelines* document published by the Department of Human Services in September 2006. They relate to an Excel file entitled: *Rural Health Workforce Planning Spreadsheet – Manual*.

Note: These *Instructions* and *Manual* spreadsheet provide an alternative to the **Automated** spreadsheet, which was forwarded to you with the *Rural Health Workforce Planning Guidelines* document.

For support and assistance with any aspect of the workforce planning process, please contact the Rural and Regional Health Services Branch, Department of Human Services on 03 9096 2011 or your regional office.

What you need to do

After you have read the *Rural Health Workforce Planning Guidelines* document and undertaken the appropriate research, planning, consultation and data sourcing, you will be ready to use these Instructions and manual spreadsheet.

There are 7 steps in the process.

Step 1: Determine workforce structure

Refer to section 2.6 of the *Guidelines*, which explains that you need to decide how you will structure or consider your agency's services for the purpose of workforce forecasting, both demand and supply. Some options are: service streams, departments, and job role.

The hypothetical agency Healthy Life Health Service, used in the *Guidelines*, has a two-level workforce structure. The first level is Service Stream, ie. Emergency, Same-Day Surgical, Multi-day surgical etc. And then each Service Stream is broken down into a common set of job roles: VMO, Medical, Nurse etc. For example, see the first two Columns in Figure 3 in the *Guidelines* (page 35).

For workforce planning purposes, it is perfectly acceptable for you to structure your workforce, at one level only (eg. service streams, departments, job role).

Step 2: Prepare the spreadsheet

Open the manual spreadsheet; enter the administrative information in the **Cover Page** tab and save the file to a safe and secure source, eg. your hard drive or server. Continue to save changes throughout your working session.

Retain an original version of the spreadsheet in the event you need to return to a 'clean' copy.

Note: From here on, only enter data in the white cells in the spreadsheet. Do not overwrite data in coloured cells as these contain forecast formula.

Step 3: Enter workforce structure and current staff numbers

In the **Forecast** tab, enter the workforce structure you determined in Step 1, and the current staffing levels. As an example, see the first three Columns in Figure 3 in the *Guidelines* (page 35).

If you only want to structure your workforce at one level (eg. service streams, departments, job role), ignore Column A and only complete Column B.

Step 4: Enter termination rates

In the **Forecast** tab, in Column D enter the resignation or termination rate for each row. The most accurate method is to use the resignation rate (excluding retirements) and then to forecast retirements separately (in Columns J-N) in accordance with your current age profile and anticipated retirement age (see section 5.4.2 of the *Guidelines*).

However, if it is difficult to access accurate data using this approach, an acceptable alternative is to enter, in the Resignation Column, a Termination Rate which includes resignations AND retirements and ignore the Retirement forecast Columns J-N. However, please note that this method may give an outcome that is more 'optimistic' than the likely reality; this is because, due to an increasingly ageing workforce, most organisations expect their future retirement levels to be higher than their trend levels. To counteract this, one approach is to input a Termination Rate (resignations and retirements), which is slightly higher than recent trends.

Step 5: Enter retirement forecasts

Note: this step is not required if you used the alternative approach described in Step 4.

Still in the **Forecast** tab, in Columns J-N enter the anticipated number of retirements for each row in accordance with your current age profile and anticipated retirement age (see section 5.4.2 of the *Guidelines*). Please enter **cumulative** data, ie. the 5 year figure should be the total number of anticipated retirements over the five year period.

Step 6: Enter demand forecasts

After appropriate consultation (see Chapter 4 of the *Guidelines*), enter demand forecasts for each job role in Columns T-X. Please note it is not essential to make demand forecasts for each of the five years. For example, some agencies only make forecasts at 1, 3 and 5 years out; or 1, 2 and 5 years out. If you don't make a demand forecast for a particular year(s), remember to 'hide' the relevant Gap Analysis column(s). For example, if you don't enter any demand for Year 4 (Column W), then Hide Column AB. (To Hide a column, select the column and then select Format>Hide>Column from the top menu.)

Step 7: Review gap calculations

Review the gap calculations in Columns Y-AC. A negative number indicates staff shortage and a positive number indicates surplus. Interpret this information in accordance with Chapter 6 of the *Guidelines*.

Tips and Tricks

If you add rows, remember to copy the relevant formula from the row above. To do this, select the cell reference(s) that you want to copy. From the Edit menu, click Copy. Select the destination cell references. From the Edit menu, click Paste. Review the calculated data to check that the outcomes match your intentions.