HIGHLAND COUNCIL

Committee:	**Redesign Board**
Date:	**08 October 2020**
Report Title:	**Workforce Planning & Development – Progress Update**
Report By:	**Executive Chief Officer Resources & Finance**

1.   Purpose/Executive Summary

1.1   This report provides members with an update on the progress of the Workforce Planning & Development Project, with related actions set out in the Council's Recovery Action Plan approved by Council 25 June 2020.

1.2   At the 10 June 2020 Redesign Board, the Executive Chief Officer for Resources & Finance presented the current position on Workforce Planning & Development, including the prevailing drivers for change (such as COVID19). It was agreed that this work would be scoped in terms of how it was to be taken forward.

1.3   Councillor Caddick and Councillor Bremner, Vice Chairs of the Redesign Board, and John Gibson (UNISON) are the Redesign Board representatives on this particular review. The project scope and related objectives have been defined (see **Appendix 1**).

1.4   The project is progressing the planned work to deliver against the following project objectives, and this report sets out the actions taken, progress to date, and planned action in the delivery of the stated objectives.

1. **Review the Council's Workforce Planning Strategy** – to ensure ongoing currency and fitness for purpose
2. **Identification of Workforce Data Required** – assessing what data is already held, what is required to enable managers to effectively manage their teams (right people, right place, right time), identifying the gaps and taking action to rectify
3. **Identification of Management Tools** – assessing what is in place, what managers need, revising and adding to the tools as required

2.   Recommendations

2.1   Members are asked to note the progress of the Workforce Planning & Development Project.

3.   Implications

3.1   **Resource**
A failure to manage workforce planning and change puts at risk the Council's capacity to make most effective use of resources.

3.2   **Legal**
Care is required that large scale and complex workforce change is managed in line with current employment legislation and Highland Council policy.

3.3   **Community (Equality, Poverty and Rural)**
Equalities Impact Assessments will be conducted in relation to Service Workforce Plans.

3.4   **Climate Change / Carbon Clever**
There are no Climate Change / Carbon Clever implications identified.

3.5   **Risk**
Having a sustainable workforce is included as a risk in the Corporate Risk Register. There are also resource challenges associated with delivering against the Project Plan whilst simultaneously addressing the resilience impacts associated with an ongoing pandemic.

3.6   **Gaelic**
There are no Gaelic implications identified.

4.   Background

4.1   Our most important resource is our staff, and they are at the centre of the services that we provide. Given the changing nature of the organisation, we need to make sure we have the right people, with the right skills, in the right place at the right time.

4.2   In its simplest term, Workforce Planning involves identifying the number of employees and types of employee skill sets required to meet Services strategic objectives and service delivery requirements.

4.3   A Workforce Planning Strategy that accounts for the environment in which the Council operates (e.g. COVID19 and Financial considerations), along with access to the right data and management tools, supports and assists managers to develop their plans to ensure that the appropriate workforce should be available to provide quality services now and in the future (sustainable workforce).

5.   Project initiation and resource

5.1   To deliver the objectives, the Workforce Planning & Development Project has been established in accordance with robust project management principles. The following

roles have been assigned to take the project forward ensuring staff who undertake different roles across the organisation are represented.

Project Resource	Role
Liz Denovan, ECO Resources and Finance	Project Sponsor
David Goldie, Head of Housing and Building Maintenance	Lead Officer
Project Manager (Transformation Team)	Project Manager (also managing the related Workforce Data Project)
Councillor Carolyn Caddick Councillor Raymond Bremner John Gibson (UNISON)	Members of the Project Team and representatives of the Redesign Board
Officer representatives from across services	Members of the Project Team – undertaking tasks assigned in line with the prioritised plan of action

5.2   A Project Plan has been produced detailing tasks, timescales and responsibilities. The plan is a live document and will be responsive to where priority action is required so as to optimise the use of available resource and deliver against the target dates detailed in **Appendix 1**).

5.3   Regular Project team meetings continue to be held as part of a focussed and coordinated approach to delivery – tasking project team members to progress activities in line with the prioritised plan of action.

5.4   Progress updates will be presented to the Redesign Board and will also be included in the regular updates to the Recovery Board (and Council) as part of reporting overall progress against the Council's Recovery Action Plan.

5.5   It is important to note that the challenges associated with the pandemic continue to apply pressure on the Council including its efforts to deliver in accordance with the Workforce Planning & Development Project Plan alongside the resilience requirements and challenges associated with an ongoing pandemic.

6.   Review the Workforce Planning Strategy

6.1   The Highland Council has an existing Workforce Planning Strategy approved in August 2017. For reasons including COVID19, reviewing this strategy is one of the 3 key aims of this Project (as stated at 1.4 in this report). We need to ensure that it is fit for purpose in light of the materially different context in which we work. To better understand these changes, challenges and opportunities, a Redesign Board Workshop was held on 7 August 20.

6.2   This workshop undertook a PESTLE review of the Workforce Planning Strategy to provide insight into the factors impacting workforce planning & development. PESTLE is a business process / technique to help focus discussions, ideas etc. within perspectives of **P**olitical, **E**conomic, **S**ocial, **T**echnological, **L**egal and **E**nvironmental. The outputs from the Workshop are being used to inform potential changes to the Workforce Planning Strategy.

6.3 As included in **Appendix 1**, engagement with managers/staff on their view on this matter is key. To that end, an electronic survey has been designed aimed at capturing views on a number of matters from those who are currently supervising/managing staff.

6.4 A survey (circa 600) is due to be issued imminently to ultimately help inform the review of the Council's current Workforce Strategy. The survey will also inform areas for further improvement such as additional data required, management tools and overall support required to deliver effective Workforce Planning & Development. Planned action following the issuing of the Survey includes analysing the survey responses, using the findings to structure follow up manager interviews, and assessing the responses on data and management tool requirements to inform the gap analysis and action required to reconcile this. Survey findings will be reported to a future Redesign Board.

6.5 In addition to the survey, and as part of the engagement approach being applied throughout the project, workshops are to be held during October to further understand from both a manager and staff perspective of what changes they consider necessary to the delivery of effective Workforce Planning & Development (e.g. data, management tools, support).

7. Identification of Workforce Data Required

7.1 The second objective of this project is to identify data requirements. The process includes identifying the data currently available (including accessibility, frequency and segmentation) and is close to completion. Via the aforementioned survey, and other means such as workshops, the Project will also identify what data is actually required. The data "gap" will therefore be identified. Addressing these gaps, and how data will be made accessible to managers effectively and efficiently, will be delivered through the Workforce Data Project.

7.2 The Workforce Data Project has been established with a key aim to deliver quick and easy access to comprehensive, accurate and real-time workforce related data that aids workforce and financial planning, decision making and monitoring at a corporate and service level and performance reporting (local and national), provided through an effective service delivery mechanism

7.3 The Workforce Data Project is progressing with a project sponsor (Liz Denovan, Executive Chief Officer Resources & Finance), lead officers (Elaine Barrie, Interim Head of HR, and Ed Foster, Head of Corporate Finance & Commercialism), Transformation project manager (who is also the Project Manager for the Workforce Planning & Development Project) and project team in place. The Project Plan for this work details tasks, timescales and responsibilities. Crucially, in following a Programme Management Office (PMO) approach for the delivery of the Recovery Action Plan overall, this helps to ensure related-projects, resources, efforts etc are aligned wherever practicable.

7.4 Aligned to the Workforce Planning Project, to support the ongoing efforts in reviewing data requirements, the Workforce Data project is already taking action to cleanse and complete data covering all established posts.

7.5 In addition to the availability of data, it is also recognised that actually accessing such whenever required and convenient is important. In respect of access to the right workforce data, the Workforce Data Project has been assessing what short-term improvements can be achieved such as identifying how existing system functionality could be widened to capture more manual processes, and how a greater application of

self-service functionality could be introduced to maintain workforce related data and provide ready access to management information.

8.   Identification of Management Tools

8.1   The third objective of the Workforce Planning & Development Project is the identification, design and provision of management tools to support Services / Managers to undertake Workforce Planning & Development.   Engagement with managers (e.g. via the survey, workshops etc.) will provide a better understanding of what existing management tools are being used, their relative fitness for purpose, and importantly where there are improvements and gaps to be addressed. Management tools can include a range data including age demographics, organisational charts, and data from external organisations such as Skills Development Scotland on regional skills assessments. Ultimately, the feedback from Managers will be the key driver in identification of the necessary tools.

8.2   Identifying the improvements and gaps will provide the basis for planning the action required to ensure that tools are made available and are well communicated to support Services / Managers to undertake Workforce Planning & Development

Designation: Head of Housing & Building Maintenance / Redesign Team Leader

Date: 01 October 2020

Author: Liz Denovan, David Goldie, Matt Bailey

Background Papers:

Appendix 1 – Workforce Planning Project Scoping Document

Key Priority	**Workforce Planning & Development**
Project Sponsor	Liz Denovan
Project Lead	David Goldie
Date	07/08/2020
Version	0.6

PURPOSE

Workforce Planning & Development is included as a Key Priority in the Highland Council Recovery Action Plan and covers all areas of the council provision in order to secure long-term sustainability and deliverability of council functions.

The key outcome of this work is the provision of a comprehensive, effective and agile Workforce Planning Framework to enable Services to fulfill their Workforce Planning & Development roles and responsibilities, and in so doing **have the right people in the right place at the right time**.

SCOPE

In Scope:

1. **Review the Workforce Planning Strategy**

   Review and make recommendations as appropriate, to update the Council's Workforce Planning Strategy (attached) to ensure ongoing currency and fitness for purpose in light of the changed context and environment (political, economic, social, technical, legal and environmental - PESTLE).

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   Key considerations in reviewing (inc. PESTLE) and updating the Strategy will likely be in respect of the following:

   - Changes to the Council structure and new leadership

   - The impact of COVID19 - identify and understand the challenges arising from COVID19 on existing Workforce Planning & development and make recommendations as to mitigation (and opportunity)

   - The Council's Financial Recovery Strategy and related financial challenges and priorities

   - Timelines for action:
     - i. Now
     - ii. Short Term 3-12 months
     - iii. Medium Term 1-3 years

iv. Long Term (e.g. based on updated Vision for HC) 3-6 years

2. Identification of Data Required to enable managers, etc to undertake WPD

Working with representatives across services, identify the data/management information requirements to deliver effective and agile Workforce Planning & Development and support robust governance on performance within this particular area, with key considerations to include:

- o What data do managers need to do their job (accurate, timeous, not labour intensive to produce/maintain)

- o How will data be accessed and made readily available

- o Importance of maintaining data (processes)

- o Inform and be informed by the Workforce Data Project (ResourceLink) – providing the data requirements for Workforce Planning and understanding the potential of the ResourceLink system for accessing and maintaining data. This can include process reviews

3. Identification of Management Tools

Identification, design and provision of management tools to support Services / Managers to undertake Workforce Planning & Development. Services may be required to undertake Skills Audits and resource data checks for example as part of their implementation of the Council's approach to Workforce Planning and Development. Other tools can include data from external organisations such as Skills Development Scotland on regional skills assessments.

Not in Scope:

i. Undertaking Workforce Planning & Development (as that falls to Services)
ii. Service Design
iii. Job numbers/reductions
iv. Teachers T&Cs - as these are agreed at a national level, though any impact on School Support staff arising from Teachers T&Cs will be in scope

EXPECTED OUTCOMES & OBJECTIVES

Detailed planning and sequencing to be undertaken for tasks relating to the stated outcomes and objectives below (including responsibilities), in line with the following milestones and associated timescales:

Ref.	Milestone	Timescale/ Period	Lead
1.	Review completed of the Workforce Planning Strategy	Sept 20	David Goldie
2.	Changes recommended and made to the Workforce Planning Strategy	Nov 20	David Goldie
3.	Workforce Planning data requirements identified	Dec 20	David Goldie
4.	Workforce Planning data requirements delivered (via Workforce Data Project)	Mar 21	David Goldie
5.	Workforce Planning management tools identified	Dec 20	David Goldie

Ref.	Milestone	Timescale/ Period	Lead
6.	Workforce Planning management tools delivered	Mar 21	David Goldie
7.	Project close and review/document lessons learned	Apr 21	David Goldie

APPROACH

With guidance from the Transformation Service, the selected project approach will be tailored to best fit with the required outcomes and objectives, timescales and risks, and will draw from a range of methods, existing Projects and interdependencies. Most notably, the Workforce Data Project (ResourceLink).

Approach to include the following (not exhaustive):

- Staff Engagement – a key part of the Project approach and critical to success is to effectively involve staff and managers at various levels and grades in revising the workforce planning approach and processes, and in the identification of data requirements – providing for inclusion and securing buy in from staff across the region and services, e.g. workshops to get insights/tap into knowledge and any other communication means as appropriate.
- On behalf of the Sponsor, David Goldie will be the Lead for this Project
- Councillor representation at all meetings will be either/or both Cllrs Carolyn Caddick and Raymond Bremner
- Council Officers will undertake research utilising secondary data. Primary data (data gathering) techniques such as questionnaires could be undertaken although time-lines and resource requirements may make this option impractical.
- Regular reports will be provided to the Redesign Board and the Recovery Board and ultimately to The Highland Council for management/executive decisions.
- A Project Board may be required where there is more than one workstream being taken forward working simultaneously. The Project Lead will lead the Project Board which will include either/or both Cllrs Carolyn Caddick and Raymond Bremner.

TIMESCALES

The scoping document includes the key dates for delivery of the in-scope work, as detailed in the "Expected Outcome & Objectives". Whilst it falls to Services to deliver Workforce Planning & Development, the critical framework (/strategy), data, and support required are key project deliverables led by the Council's Redesign Board taking cognisance that the focus, challenges and opportunities of Workforce Planning & Development will vary now; in the short-term (3-12 months); medium term (1-3 years) and long-term (e.g. 3-6 years with update visions/s for the Council).

RESOURCES

Through the delivery and ongoing planning of the work, resource requirements will be continually assessed, with the Transformation Service working with the Sponsor and Lead to secure the relevant resource such as Business Change, Programme/Project Management, HR, Lean, Finance, and Audit.

The following sets out the three areas of resourcing that will be deployed through the lifetime of the project, changing as required to reflect the focus of work at any point in time in line with the Project Plan.

- ✓ **Core Project Team Resource**
  Lead – David Goldie
  Project Manager
  Others to be brought on to the team as required at any point in time in line with the Project Plan

- ✓ **Wider Project Team/Subject Matter Expertise** – specific to the scope of work and the objectives to be delivered, including Service representatives

- ✓ **External Resource** – e.g. non-Council specialist roles such as Third Sector and other public sector organizations, consultancy, etc

In addition to the above, and in line with the Approach, staff from services, at various levels, and from across all Council areas will be provided with the opportunity to be involved, including as part of the project team, as whilst this Redesign review is to provide the Framework, the actual delivery of Workforce Planning & Development is for Services to lead and deliver.

RISKS

The risk and impact assessment management approach for this programme of work will be monitored and updated in liaison with all key stakeholders. Initial risks identified are as follows:

1. Availability of staff to undertake this review
2. Increase in lockdown measures
3. Legal implications
4. Other change projects that might directly affect or overlap this overarching work. Most notably the Workforce Data Project.