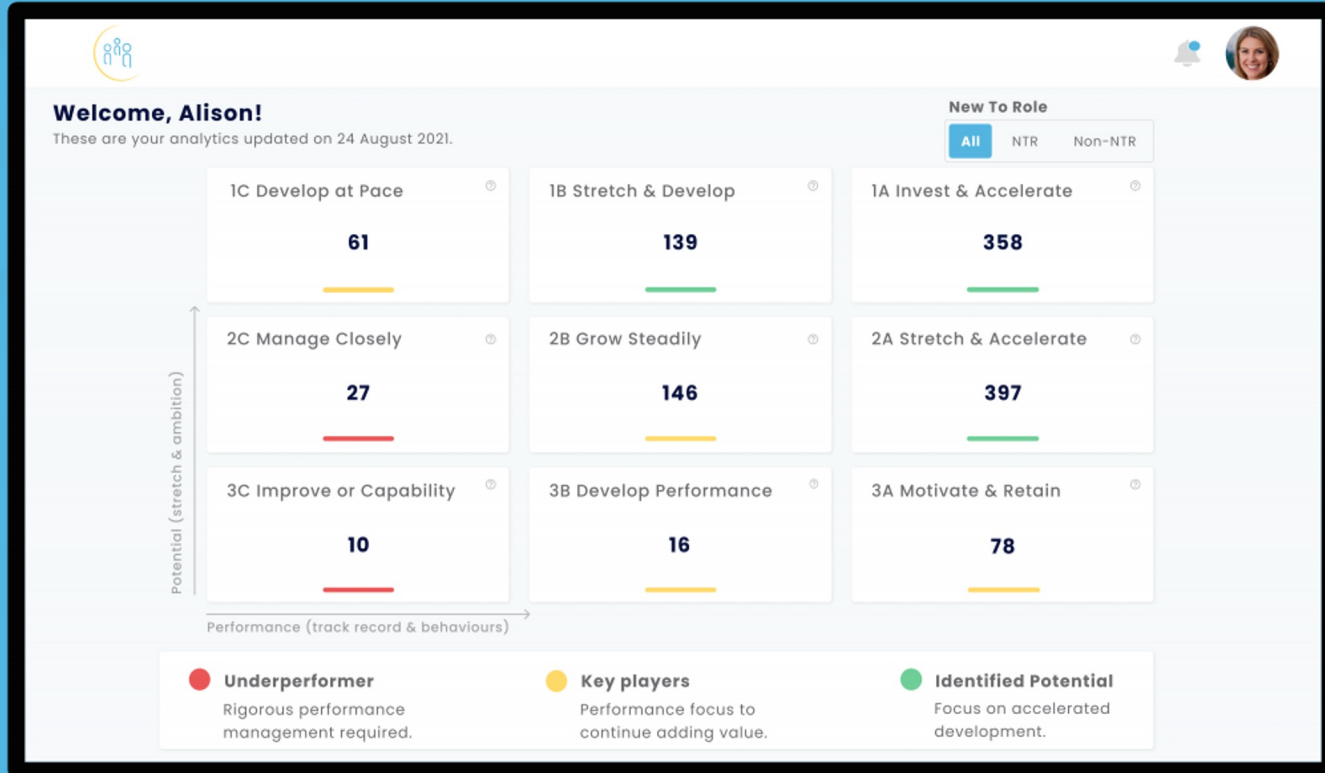


# Workforce Planning

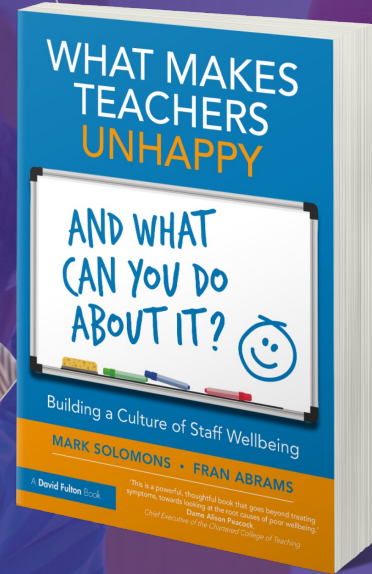




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# Workforce Planning

*Workforce planning is about analysing your current workforce and determining your future needs. You are identifying the gap between the workforce you have available now and what you ideally need, initially looking at the budget year ahead and then strategically over the next 3 – 5 years*

Chartered Institute of Personnel and Development

# Quality Descriptors



Department  
for Education

## Annex A – Trust Quality Descriptions

High-Quality and Inclusive Education

School Improvement

Workforce

Finance and Operations

Governance and Leadership

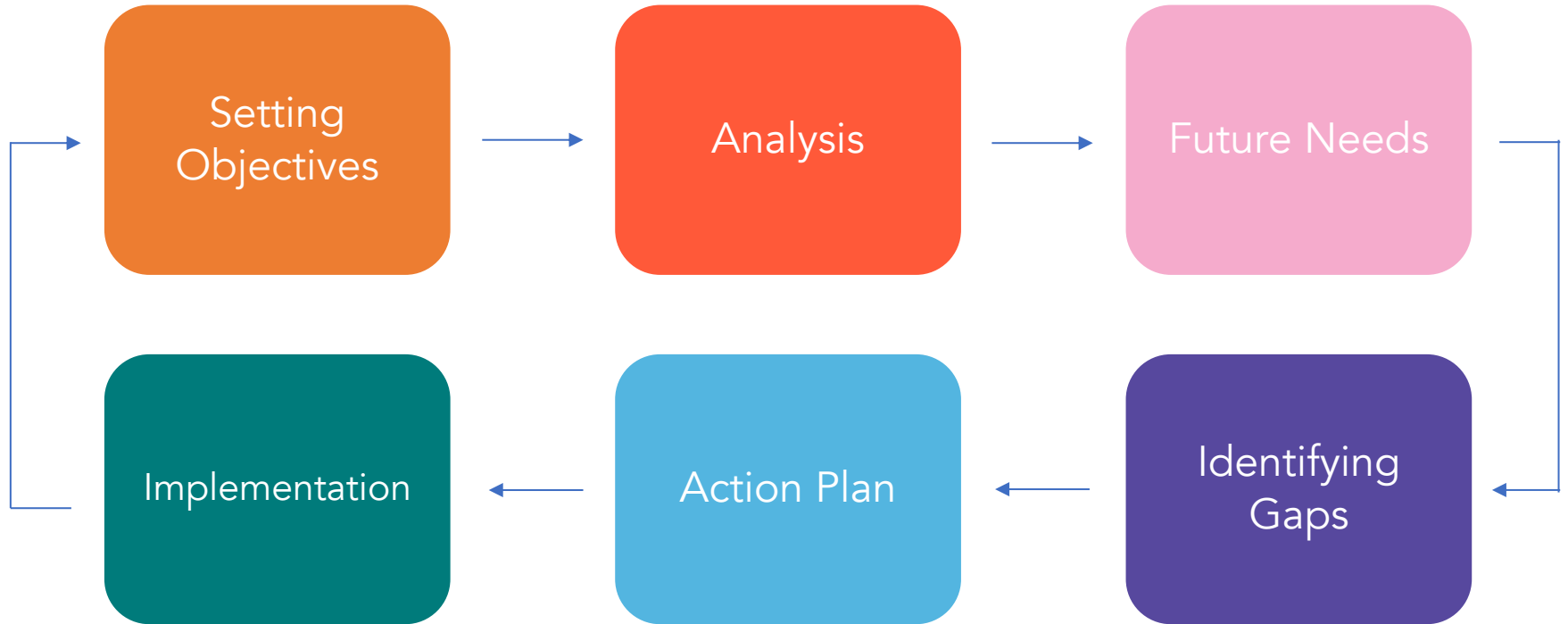
### Workforce

Theme	Description
Culture	Creates a high-performing working culture for all staff that promotes collaboration, aspiration and support. Uses the flexibilities of the trust structure to create opportunities for staff. Recognises the critical value of high-quality teaching and champions the profession.
Workload	Fosters a supportive working environment by managing workload, prioritising wellbeing and taking action to support all staff.
Retention	Supports the retention of great staff both within the individual trust and across the school system.
Working environment	Prioritises effective behaviour and attendance policies to create a safe environment in which to work and learn. Utilises the trust structure so that staff are empowered to deliver their best.
Developing new and early career teachers	Makes a positive contribution to the wider system by delivering high-quality training and/or placements for trainee teachers. Supports early career teachers through the Early Career Framework.
Continuing Professional Development	Encourages and enables all staff to build their expertise through evidence-based professional development and mentoring.
Collaboration	Builds an innovative and vibrant community of professionals, collaborating across schools and other trusts to develop and share expertise and evidence-based practice.
Line management & career progression	Ensures every member of staff is effectively line managed to maintain high performance. Actively encourages career progression opportunities across the trust.
Equality, diversity, inclusion	Ensures inclusive working environments, supports flexible working and takes action to promote equality and diversity.

# Workforce Planning

- Resources
- Skills
- Knowledge

# Workforce Planning Model

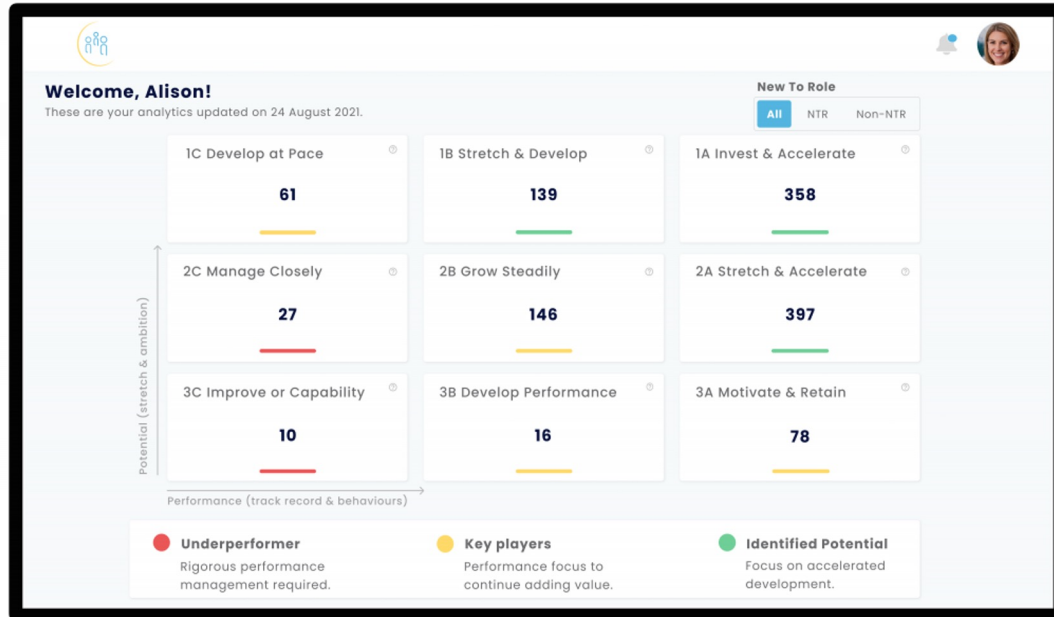


# 1. Setting Objectives





# 2. Analysis



# 3. Future needs



# Future Workforce requirements

- Asking
- Budget based
- Benchmarking
- Extrapolating trends
- Forecasting
- Scenario Planning

# 4. Identify Gaps



# Identify Gaps

- Whether you have the right number of staff, in the right place and covering the right areas
- Whether you have the right skills and knowledge

# 5. Action Plan

<b>OBJECTIVES</b> (List of Goals)	<b>TASKS</b> (what you need to do to achieve the goals)	<b>SUCCESS CRITERIA</b> (how you will identify your success)	<b>TIME FRAME</b> (by when you need to complete the tasks)	<b>RESOURCES</b> (what or who can help you complete tasks)

# Action Plan

## Buy

Acquiring the necessary external resources and talent – this includes your recruitment plans, process and employee offer.

# Action Plan

## Build

Developing your internal resources and talent, covering professional development, talent schemes, career paths, competencies, diversity and succession planning.



# Action Plan

## Borrow

Flexing your resources for when they are needed, including using contractors, outsourcing and secondments.

# Action Plan

## Bind

Retaining key employees and capabilities, through developing such things as leadership, career paths, culture, and rewards.

# Action Plan

## Bounce

Removing employees and using performance management, including capability, redeployment and if necessary, redundancy.

# Action Plan

## Balance

Ensuring an appropriate combination of operational performance, budget, service levels, performance improvement, technology, and organisational design.

# Action Plan

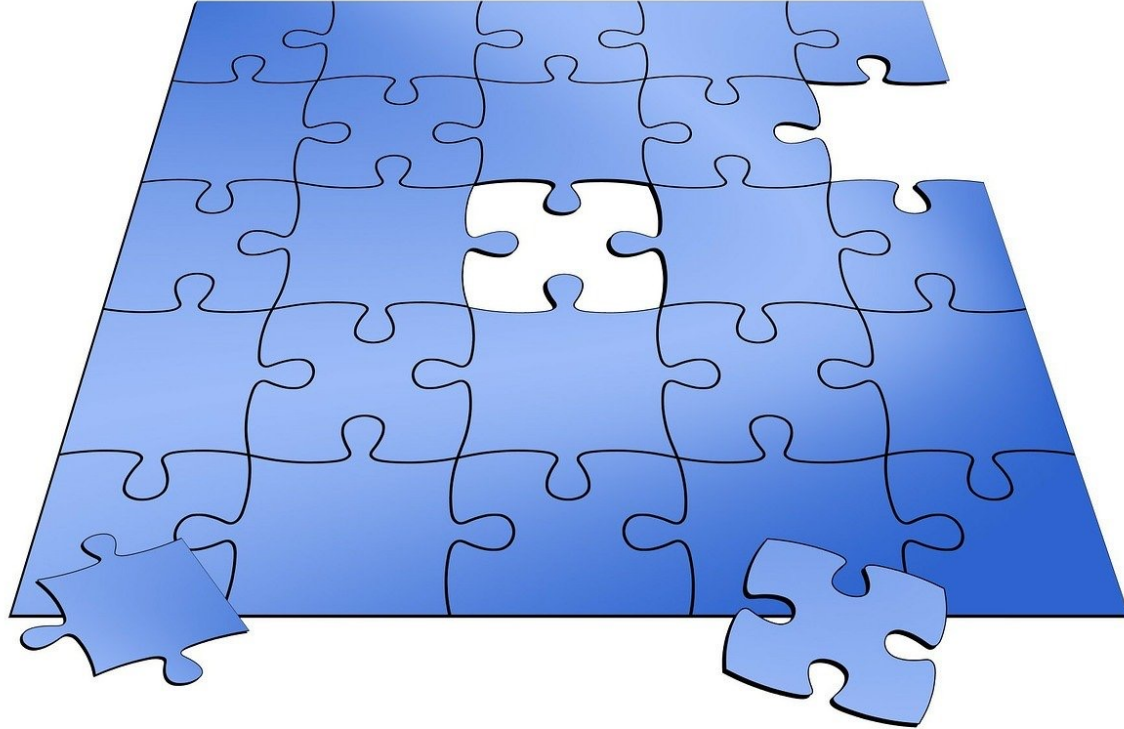
## Bot

Use of automation to support or replace existing capacity or capability, including AI and machine learning.

# Action Plan

- Buy
- Build
- Borrow
- Bind
- Bounce
- Balance
- Bot

# 6. Implementation

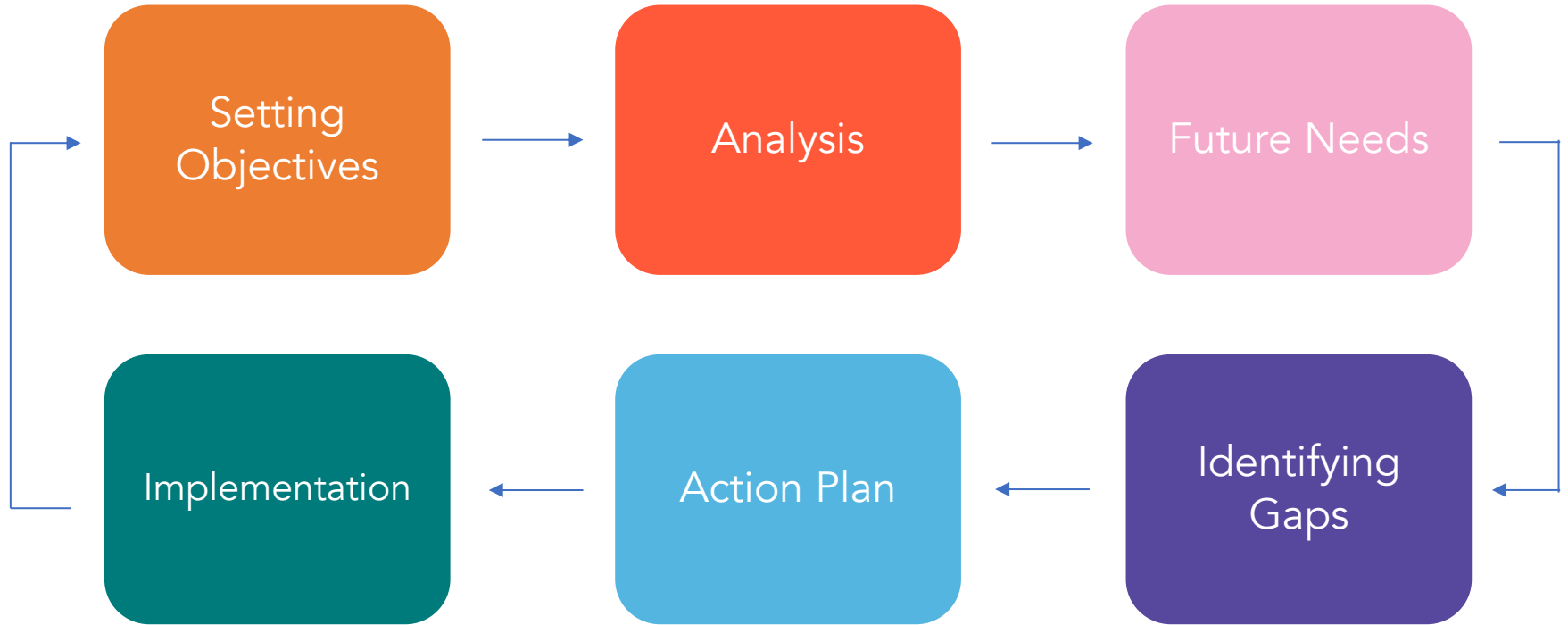


# Implementation

- Accountabilities and responsibilities
- Governance, monitoring and reporting
- Plans broken down
- Identify and manage risks
- Utilise people analytics and data
- Manage the plan



# People Strategy



# People Problems



# DATA – Knowing Your Numbers

## Example Verifiers

- **Teacher retention:** percentage of teachers leaving the trust
- **Leader retention:** percentage of leaders leaving the trust
- **Teacher experience:** percentage of teachers with less than three years' experience
- **Continuing Professional Development:** percentage take up of National Professional Qualifications

# Know Your Numbers

## Examples of qualitative information

- **Staff engagement:** for example, if a trust has internal people survey data
- **Leaver destinations:** for example, if staff have moved between the state-funded and independent school sector
- **Workload:** how the trust is managing workload, prioritising wellbeing and supporting staff
- **Ofsted reports:** where there is relevant information, for example within consideration of Leadership and Management
- **Continuing Professional Development:** how the trust is improving quality in its workforce, especially the quality of teaching

# Know Your Numbers

- % of staff leaving, including % of talent (% staying) – by job role
- Leaver destinations
- % of vacancies filled internally
- Time to fill vacancies
- Number of applicants per vacancy & % of applications filled on 1<sup>st</sup> attempt
- Staff absence days & occurrences
- % of staff undertaking & achieving professional development
- Diversity & Gender data, including pay gap
- Qualitative feedback, for example staff survey scores, comments, workload changes

# Stay Interviews

## Stay Interviews

**Exit Interviews** are more commonly used to learn about why people leave and not always as effectively as they might be.

With recruitment and retention being a key challenge for trusts and school, how can you gain an advantage and prevent more staff from leaving.

Adding **Stay Interviews** can give you a competitive advantage and enable you to better understand what keeps people working for you and allow you to identify and address issues ahead of them leaving. The questions will differ from those asked in an Exit Interview.

It should be conducted by someone with enough experience and confidence to ask the right questions. This should be their direct line manager, though this may not always be possible due to experience and skills.

The role of the interviewer is to make the experience positive and the person must feel like they have their best interests in mind (and this should be the intent of the interviewer). They have to make them feel comfortable and encourage them to give candid feedback without repercussions and demonstrate how important their feedback is.

The object is to check in with staff and learn more about how they're feeling about their work, the trust or school and their future. The reasons why people stay in a role will provide you with real



## Stay Interview Questions

### Assessing a staff members general outlook

- What do you look forward to when you come to work each day?
- What do you like most / least about working here?
- What keeps you working here?
- What might tempt you to leave?
- When was the last time you thought about leaving the organisation?
- What situation made you think of leaving?
- Would you recommend working here to your friends? You can use a 1 -10 scale if this helps. Why (or why not)?

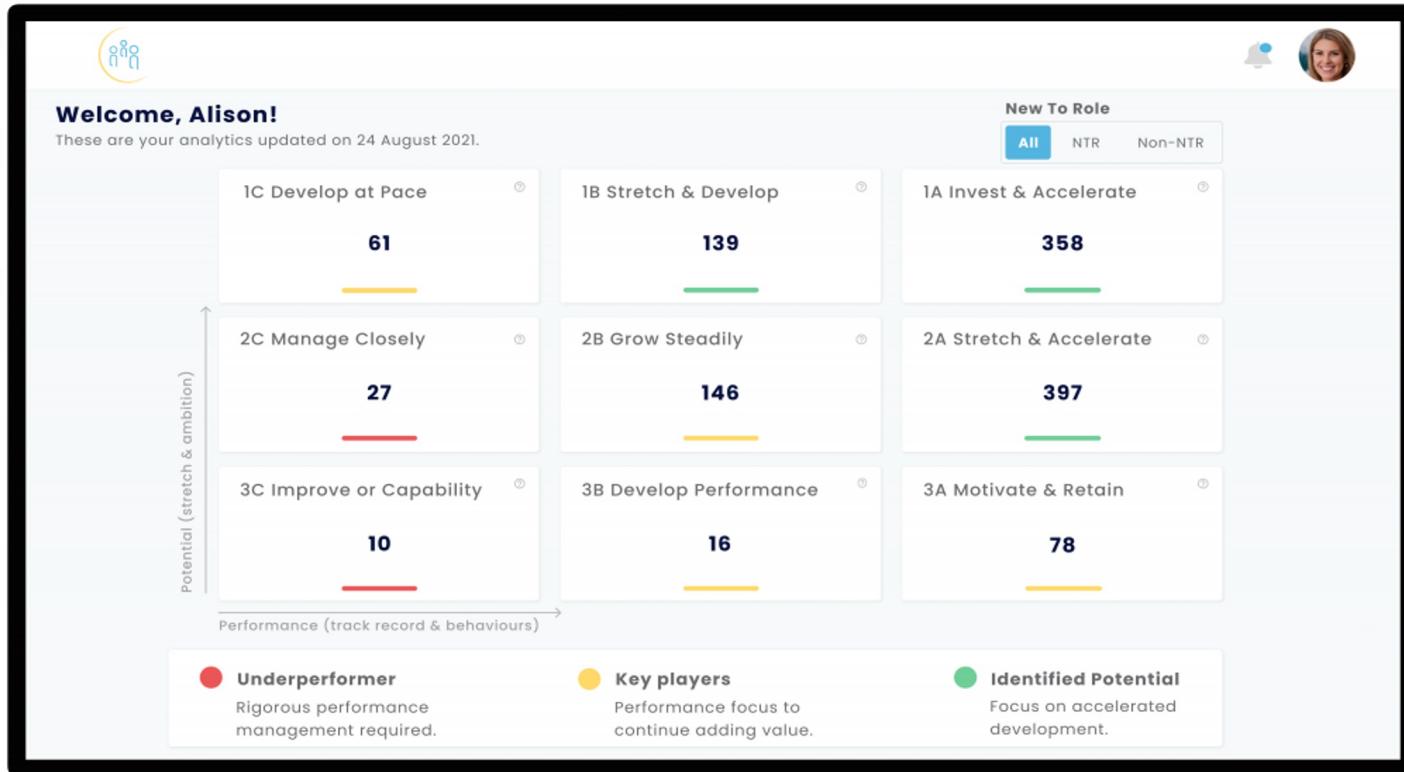
### How staff members feel about their work

- What would you change about your job, if you could?
- What do you think about your objectives?
- How meaningful do you find your work?
- Do you have the right resources and support to do your best work? If not, what is missing?

### Staff Motivation

- What would make your work more satisfying?
- How do you like to be recognised? Is this happening for you here?
- What motivates / demotivates you?
- Are your work contributions valued? (If no, why not?)

# The 9 Box Grid



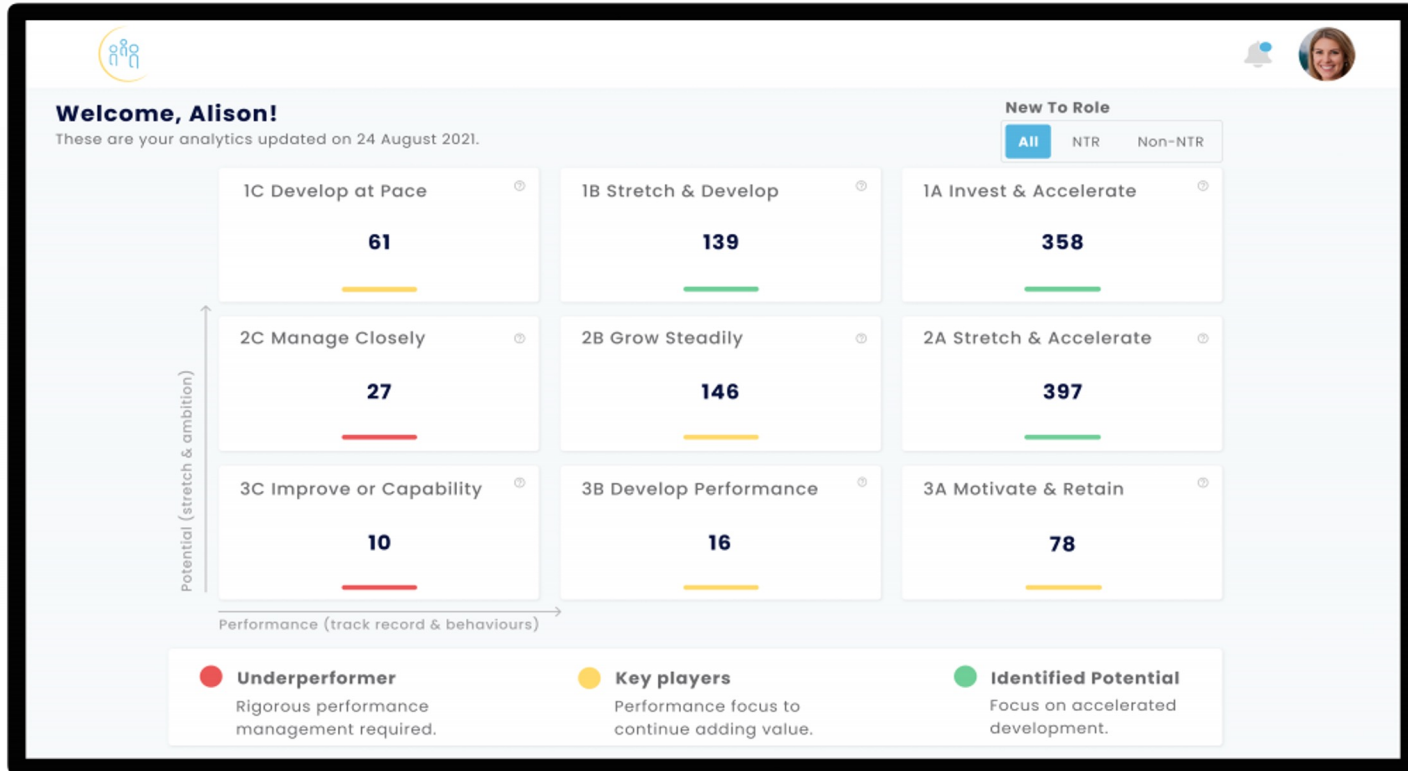
# The 9 Box Grid

The screenshot shows a web interface titled 'Insights' with a sidebar on the left containing navigation options: Dashboard, Insights, MANAGE, Employees, Reviews, Questions, Organisations, and User Guide. The main content area features a search bar and filter buttons for 'More Filters', 'Hide Filters', and 'Reset all filters'. Below the search bar are several filter dropdowns: Rating (set to 'High'), Risk of Leaving (set to 'In next two years'), Impact of Leaving (set to 'High'), Job Title (set to 'Search'), Department (set to 'Search'), and Promotion Year (set to '12 months').

Full Name	Job Title	Department	Reviewed	Likely Next Role	Likely Replacement	Assessment	Reviewer
River Alton	Teacher	Science	12/10/2022	Deputy Head	Not Identified	Identified Potential (1A)	Alicia Russo
Jonathan Tallett	Instructional Coach	Support Services	10/08/2022	Student Service Manager	Michaela Cooke	Identified Potential (1A)	Sunil Mistry
Michaela Cooke	Instructional Coach	Support Services	10/08/2022	Student Service Manager	Not Identified	Key Player (2B)	Sunil Mistry
Nicola Fay	Instructional Coach	Support Services	10/08/2022	Guidance Lead	Ross Bofinger	Identified Potential (2A)	Sunil Mistry
Laura Woods	Nurse	Medical	10/08/2022	Aids Education Coordinator	Mark Ainger	Identified Potential (1A)	Sunil Mistry
Vivienne Dudley	Teacher	English	10/08/2022	Principal	Kelly Nettlehip	Identified Potential (1A)	Alicia Russo
Katrina Kenny	1st Grade Teacher	Teaching	09/08/2022	Assistant Principal	Not Identified	Identified Potential (1A)	Mark Solomons



# The 9 Box Grid



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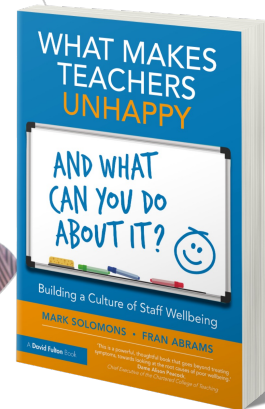
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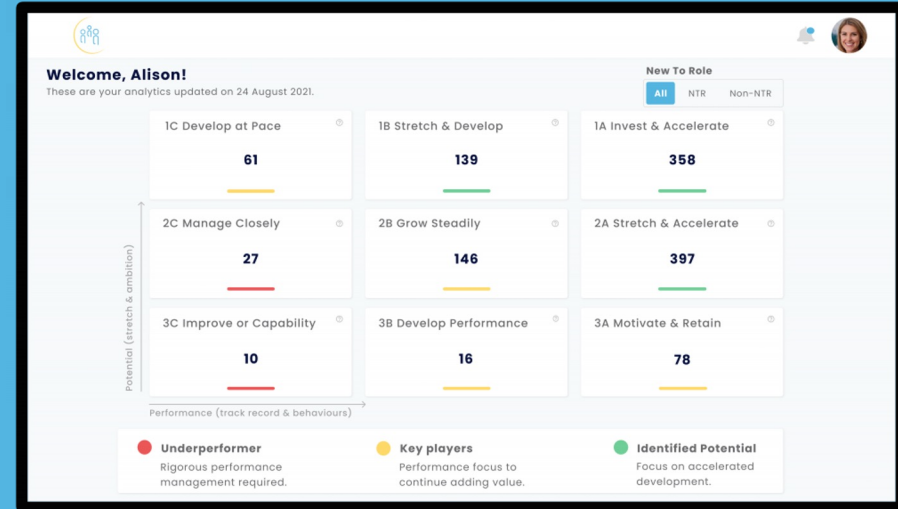


<https://welbee.co.uk>



# Uncover people insights across your MAT

- ✓ Identify staff at risk of leaving
- ✓ Surface talent from across your MAT
- ✓ Manage succession & identify replacements
- ✓ Highlight next and highest likely roles and develop people for them
- ✓ Improve decision making and action taken
- ✓ Raise staff retention & reduce recruitment needs
- ✓ Improve financial performance & student outcomes



# Quickly review your staff

Review across the whole MAT, a school, a department or a single staff member

Using industry validated questions, with the option to edit, add your own and align with your culture and values, measure staff throughout your MAT against their performance and potential.

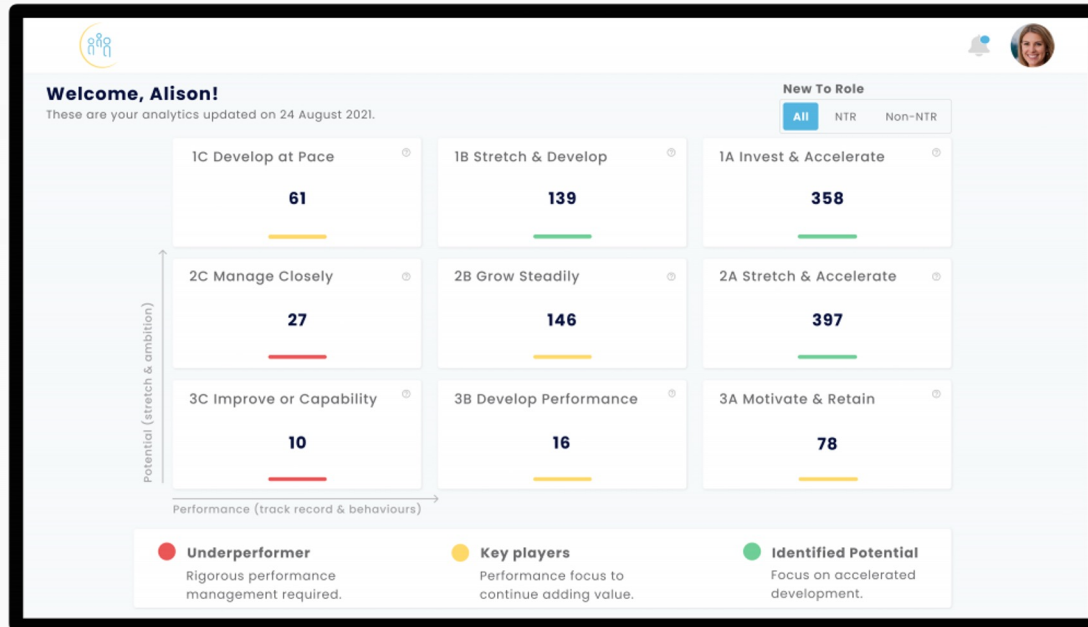
The screenshot displays a web application interface for a staff review. On the left is a navigation sidebar with options: Dashboard, Insights, MANAGE, Employees, Reviews (highlighted), Questions, and User Guide. The main content area is titled 'Review in Progress' for 'Janice James | Principal'. It features a breadcrumb trail 'Reviews / Review in Progress' and a tabbed interface with 'Track Record' selected. Below the tabs are eight performance questions, each with 'Yes' and 'No' buttons:

- Have they consistently delivered the student outcomes expected of them? \*
- Have they consistently delivered the pastoral and wider development needs of students and colleagues alongside academic outcomes? \*
- Do they effectively contribute to the performance and development of their immediate department or function? \*
- Do they proactively drive improvements to the performance and development of their department or function? \*
- Do they proactively drive school improvements that have a whole school impact? \*
- Have they had a positive impact on extra-curricular activities and relationships with parents? \*
- Have they supported and developed other staff members and had a sustained impact on their performance? \*
- Do they consistently and effectively set and meet deadlines? \*

At the bottom of the form are 'Cancel' and 'Next' buttons.

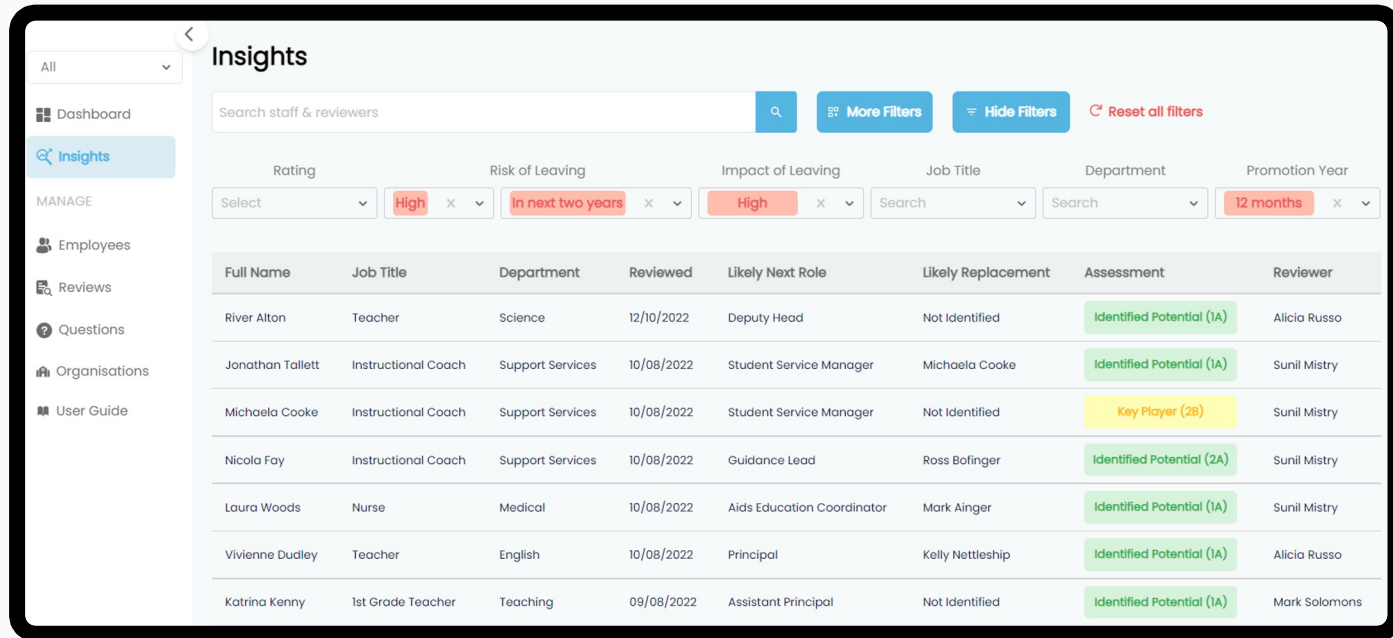
# See where staff sit across your MAT

Simply create your succession, talent and retention plan by identifying and uncovering those staff ready to develop and progress to more senior roles, those at risk of leaving and those needing greater support.



# Uncover people insights across your MAT

Surface deep insights across a range of filters to build an informed and proactive succession, talent and retention plan to develop and retain your staff.



The screenshot displays the 'Insights' dashboard interface. On the left is a navigation sidebar with options: All, Dashboard, Insights (selected), MANAGE, Employees, Reviews, Questions, Organisations, and User Guide. The main content area features a search bar for 'Search staff & reviewers' and buttons for 'More Filters', 'Hide Filters', and 'Reset all filters'. Below the search bar are filter controls for Rating (set to High), Risk of Leaving (set to In next two years), Impact of Leaving (set to High), Job Title, Department, and Promotion Year (set to 12 months). The main data table lists staff members with columns for Full Name, Job Title, Department, Reviewed, Likely Next Role, Likely Replacement, Assessment, and Reviewer.

Full Name	Job Title	Department	Reviewed	Likely Next Role	Likely Replacement	Assessment	Reviewer
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Katrina Kenny	1st Grade Teacher	Teaching	09/08/2022	Assistant Principal	Not Identified	Identified Potential (1A)	Mark Solomons



Making succession planning, talent development and retention simpler and insightful for your MAT

<https://mypeoplestrategy.com/the-PS-way>

*[Book your free demo here to see how we can help](#)*