

Workforce Planning Guide

Guidance, Tools, and Resources to Assist Public Health Agencies in Workforce Planning



August 2024

Acknowledgments

The Association of State and Territorial Health Officials (ASTHO) would like to thank all who contributed to this guide. Their firsthand knowledge, experiences, and expertise were invaluable in the development of this guide.

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Introduction

Purpose of the Workforce Planning Guide

This Workforce Planning Guide (referred to as Guide throughout) is designed to assist governmental state, territorial, freely associated state, and local public health agencies in workforce (WF) planning. This Guide provides information, resources, and tools to develop an effective workforce planning process to create a three to five-year workforce plan. It is designed for all governmental public health agencies at all stages of plan preparation.

The Guide can be used both by agencies that are pursuing accreditation through the Public Health Accreditation Board (PHAB) and those that are not. The Guide supports workforce-related requirements as outlined in PHAB's Standards and Measures for Accreditation; however, using this guide does not guarantee conformity with the standards and measures.

Guide Development

This Guide was developed through a collaborative effort between ASTHO and the Workforce Planning Guide Advisory Team with representatives from governmental public health agencies and national and state agencies with expertise in the governmental public health workforce.

Defining Workforce Terms

While there are various definitions for workforce terms, ASTHO uses the following definitions for clarity and consistency.

Workforce Planning

A process that includes identifying current and future workforce needs and developing a plan or strategy to address demographic trends, to recruit, train, and retain individuals in these roles, and to strengthen organizational culture.

Workforce Development (in Public Health)

Aims to improve health outcomes by enhancing the training, skills, and performance of public health workers. While workforce development is an important component within the area of workforce, training and performance is not the only critical component to ensure a high-performing, sustainable workforce. Staff that lead workforce efforts also focus on broader agency needs which may include strengthening recruitment, training, retention, organizational culture, well-being of the workforce, etc.

Additional workforce definitions can be found on ASTHO's Workforce Website [\[link here\]](#).



Significance of Workforce Planning

Workforce planning is an investment in individuals, the workforce, and the agency. It is an opportunity to align action items and agency values across the following areas:

- Recruitment
- Retention
- Succession and Sustainability Planning
- Professional Development and Learning Culture

Regardless of whether your agency engages in workforce planning as a requirement for a grant, as a PHAB accreditation or reaccreditation requirement, or simply as a best practice, it is an excellent opportunity for your agency to step back, assess, strategize, and implement workforce initiatives that can lead to: improved quality of services and systems, enhanced organizational performance, improved workplace culture, improved recruitment and retention rates, increased employee satisfaction, opportunities to receive a return on investment and cost savings from decreasing turnover, improved capacity for your agency to address public health crises, and improved ability for your agency to adapt and change.

Phases of Workforce Planning

This Guide outlines five phases of workforce planning as illustrated in the diagram below.



Phase 1 – Organize

The first phase is to organize the workforce planning process for maximum efficiency. The following steps do not need to be completed in order. The Organize Phase is significant. By starting strong with a solid foundation, your agency can be set up for success for the remaining phases of workforce planning.

Organize Checklist

Step	Description	Notes
1. Identify a Lead	Identify a staff member to lead the workforce planning process. - While completing the workforce planning process and writing the plan is not the sole responsibility of a single individual, the lead is responsible for managing the process overall. This individual should prioritize keeping the workforce planning team informed, engaged, and supported through regular communication. - This individual may be a Workforce Director or another member of leadership with effective communication, management, and facilitation skills. - If your agency is pursuing accreditation, the lead should have a basic understanding of the PHAB Standards and Measures for Accreditation. Equip the Lead with the broad vision and objectives of the planning process. Resources Reach out to ASTHO or check out PublicHealthCareers.org for sample Workforce Director job descriptions.	

Step (Continued)	Description (Continued)	Notes (Continued)
2. Create a Workforce Planning Committee	Assemble a committee of multi-disciplinary individuals to guide the planning process and help write the plan. • This committee should comprise approximately 4-10 individuals, depending on the agency's size. • Committee members should have representation from different agency divisions, departments, and programs, and demographics. Refer to DEIAB Checklist in this Guide for considerations for a diverse and inclusive planning committee. Consider the methods by which committee members are included (e.g., self-selection, application, nomination, assignment, etc.) and how those methods impact the diversity of perspectives on the committee. • Ideal committee members are champions of workforce efforts and are prepared to communicate about the planning process across the agency. • Establish committee agreements, roles, and responsibilities and document in a Charter. • Consider including external partners that play a role in your agency's workforce goals (e.g., universities or schools involved in pathway programs). Resources • Consider the strategies in Harvard's Inclusive Meeting Guide • Use a Committee Charter to outline roles and responsibilities.	

Step (Continued)	Description (Continued)	Notes (Continued)
3. Garner Leadership Support	Gain agency leadership buy-in for the workforce planning process, plan, implementation. • Leadership support is essential for the success of workforce planning. Strong and visible support helps establish a culture that values and prioritizes workforce development. • Leaders with authority and influence play key roles in the workforce planning process which include: » Setting the Tone by communicating the importance of workforce planning regularly and in a transparent manner. » Allocating Resources strategically, which ensures workforce efforts are adequately supported. Resources include financial (for training programs), staff (for dedicated workforce development roles), and time (for staff to engage in learning activities). » Engaging Staff and Garnering Buy-In, which can be accomplished by involving staff in decision-making processes, seeking their input and feedback, and providing opportunities for their active involvement in shaping the workforce plan. This engagement and buy-in can contribute to a sense of ownership and investment in the success of workforce efforts. Resources • Adaptive Leadership Trainings and Resources - NACCHO	

Step (Continued)	Description (Continued)	Notes (Continued)
4. Use Organizational Change Management Strategies	Familiarize and use change management strategies. Implementing a workforce planning process and developing a workforce plan often involves introducing new processes, procedures, and learning opportunities, which require change within the agency. Utilizing change management strategies can help ensure the successful adoption and implementation of workforce initiatives. Learning about, providing training on, and using change management strategies at the beginning of the process can assist your agency in integrating those strategies throughout the workforce planning process, particularly in plan implementation. Resources » ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement) » Kotter's 8-Step Change Model	
5. Structure the Planning Process	Structure the planning process including the following: • Document the process: Documenting the process through a project plan and keeping track of agendas, meeting minutes, attendance sheets, and other planning materials will be an asset when it comes to drafting the plan.	

Step (Continued)	Description (Continued)	Notes (Continued)
	• Create a timeline: The WF planning process from preparation to implementation may take 4-10 months to accomplish. Factors that may impact the timeline include the level of support for workforce planning, competing priorities, existing momentum around workforce efforts, accreditation or reaccreditation timelines, and timing around alignment with other organizational plans or processes (e.g., strategic planning, legislative session). • Develop a project plan: Consider a project planning tool to keep track of resources, action steps, and milestones. • Align with PHAB Standards and Measures (if applicable): PHAB is the sole national accrediting body for governmental public health departments. The workforce planning process and development of a Workforce Development Plan is a requirement within the Standards and Measures for Initial Accreditation, Reaccreditation, and Pathways Recognition. Agencies are strongly encouraged to consult the Standards and Measures for the most up to date information regarding workforce-related requirements. Additionally, irrespective of an agency's intent to apply for a PHAB program, the Standards and Measures can serve as best practice guidelines for workforce planning efforts.	

Step (Continued)	Description (Continued)	Notes (Continued)
	• Establish a communications plan: Creating a communication plan from the beginning will assist your agency and the Workforce Committee in garnering support, buy-in, and ensuring implementation. Resources • Use a project management tool in Excel or shared software program already in use by your agency such as the Minnesota Department of Health’s Action Plan tool. • Use a communication tool such as the Public Health Foundation’s Planning Before You Communicate Tool.	
6. Align with Other Agency Plans	• Align Workforce Plan with Other Agency Plans: It is crucial to align your workforce plan with other foundational plans and priorities within your agency. » This alignment fosters coherence, integration, and efficiency in agency efforts. • Workforce Plans are influenced by various agency and community plans, such as strategic plans, operational plans, and financial plans. Conversely, workforce plans influence other agency plans by providing insights into staffing requirements, skill gaps, and talent development strategies, ensuring alignment with broader agency goals and objectives.	

Step (Continued)	Description (Continued)	Notes (Continued)
	» Essential foundational plans and priorities that intersect with workforce planning may include: ◇ State/Community Health Improvement Plan ◇ Health Agency Strategic Plan ◇ Data Modernization Plan ◇ Financial Plans ◇ Quality Improvement Initiatives ◇ Performance Management Processes	

Alignment Examples

If the organization's strategic plan emphasizes addressing health disparities in underserved communities, the workforce plan can prioritize training and recruitment strategies that focus on cultural humility and health equity.

If the budgeting process identifies funding for staff training and development, the workforce plan can use those resources to implement training programs, professional development opportunities, or certification courses.

If quality improvement initiatives identify workforce-related performance gaps, the workforce plan can address those gaps through targeted training, performance improvement projects, or process redesign.

Phase 2 – Assess the Environment

The Assessment phase includes consideration of your organizational environment and priorities, workforce data and tools competencies, as well as anticipated future workforce needs.



Organizational Environment and Agency Priorities

Consider these questions about the organizational environment and agency priorities as part of the assessment phase, informing the workforce planning process.

Area	Questions to Consider	Notes
History	- What is the history of workforce planning in the organization? - What has been done already or tried before? - What can past experiences tell you about feasibility, innovation, and opportunities in the organization for workforce planning? What key lessons do you need to remember as you embark on planning? - Does the agency have elements of a workforce plan or workforce planning process, such as assessment data or a training plan?	
Governance	- Are there governmental or agency system mandates, requirements, or restrictions that would affect your workforce plan? - Where is there alignment between agency initiatives and governing entity initiatives? - What interdepartmental resources can you leverage in the workforce planning process? - What best practices can you gather from other similar agencies? - Are there training requirements for all state/local/tribal/agency employees?	

Area (Continued)	Questions to Consider (Continued)	Notes (Continued)
Policies	• What existing agency policies would impact workforce planning? • Does the agency have a tuition reimbursement policy? • Does the agency have a release time policy for professional development and training? • Are workforce-related policies consistent across the organization or do they apply only to specific job classifications?	
Labor Structures	• Is the workforce unionized in whole or in part? • What limitations exist in terms of what can or cannot be done for segments of the workforce? • Does the agency have a union representative who should be included in the workforce planning process? • Do labor organizations offer unique benefits to their members that could support your workforce development efforts?	
Merit Systems	• Is the agency bound by merit systems and how does that influence the workforce planning efforts? • Does the agency have defined pathways for career advancement?	

Area (Continued)	Questions to Consider (Continued)	Notes (Continued)
Programmatic and Budgeting Considerations	• Are there governmental or agency budget restrictions that limit dollars or time devoted to training or travel? • Does the agency budget have funds to support staff training and professional development activities? • How might funding be leveraged through grants to support agency training efforts?	
Employee Performance	• How does the employee performance review process impact the expectations for professional development and the agency's culture? Is the process strengths-based or punitive? • Is the development of leaders supported at all levels of the organization? • Is innovation and health equity work supported and incentivized?	
Agency Priorities	• What implications do the mission, vision, and core values of the agency have on the workforce planning process?	



Workforce Data Tools

The table below presents multiple workforce data tools that can guide the workforce planning process. It is organized by sources that capture data on workforce capacity, workforce capability and/or workplace culture and well-being. This is not an exhaustive list, nor must all resources be used as part of your process. Limitations could be access to data, cost, time, and staff capacity. Start with what you have and determine what else, if anything, is needed.

Workforce capacity means the number of qualified, capable, and culturally representative employees required to sufficiently deliver public health services.

Workforce capabilities are the skills, knowledge, behaviors, tools, and processes needed for the workforce to achieve the intended goals.

Workplace culture is shared norms, values, attitudes, and practices that form the collective identity of a workplace or agency.

Workforce well-being encompasses multiple domains ranging from job satisfaction to work-life balance, equitable practices, and inclusion across an agency. It ensures workers are physically and psychologically safe, sustains healthy workplace culture, aids in recruitment and retention efforts, and leads to increased performance and productivity. Refer to the [DEIAB Checklist](#) for considerations regarding data collection and analysis.



¹ [Workforce Capacity Definition | Law Insider](#)

² [What Is The Workforce Capability Framework? | Acorn PLMS](#)

³ [What Is Company Culture? Definition & Strategies – Forbes Advisor](#)

⁴ "Psychological safety in the workplace promotes interpersonal risk taking in the form of voicing ideas, questions, and also making mistakes without a fear of retribution or retaliation. The concept captures inclusion safety, learner safety, contributor safety, and challenger safety." Edmondson, Amy C. [The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth](#). Hoboken, NJ: John Wiley & Sons, 2018.

⁵ [Workforce Planning Tools: Frameworks That Enhance Workforce Well-Being and Retention | ASTHO](#)

Data Tools	Workforce Capacity	Workforce Capability	Workplace Culture and Workforce Well-being
<u>PH WINS (the Public Health Workforce Interests and Needs Survey)</u>: PH WINS supports the governmental public health workforce by measuring strengths and gaps to inform future investments in funding, training, recruitment, and retention. Findings are available at the national, state and local level.	✓	✓	✓
Agency Human Resources: Quantitative and qualitative data from sources such as an agency human resource system, agency performance management system, stay and exit interview data, hiring manager surveys, etc. Data measures could include time to hire, vacancy rates, employee satisfaction, market salary and benefit comparisons, staff retention rates, demographics of candidates compared to population served, employee demographics, retention rates, employee satisfaction and engagement. For recipients of the CDC’s Public Health Infrastructure Grant, consider tracking the human resource measures required of the grant.	✓		✓
<u>Public Health Workforce Calculator</u>: The Public Health Workforce Calculator is a tool to help local health departments with workforce planning by utilizing information provided to estimate the number of full-time equivalents (FTEs) needed to ensure the provision of the Foundational Public Health Services (FPHS). The Calculator is intended for use in decentralized public health systems with a jurisdiction size of 500,000 or less. Departments of other sizes/structures may use the calculator but resulting estimates may not be reliable.	✓		

Data Tools (Continued)	Workforce Capacity (Continued)	Workforce Capability (Continued)	Workplace Culture and Workforce Well-being (Continued)
<u>Foundational Public Health Services Capacity and Cost Assessment (FPHS)</u> : FPHS helps health departments and health department systems assess their current spending and capacity towards the FPHS, determine the needed investments to fully implement the FPHS, and identify the resources needed to transform governmental public health systems. The assessment provides an understanding of costs, expertise, and capacity toward the national FPHS framework.	✓		
Agency Workforce Assessment: Consider conducting a comprehensive assessment of staff competencies and capacities. An agency workforce assessment could include a survey assessing training needs and organizational culture, interviews with staff, focus groups, input from supervisors, and information from performance evaluations. This provides an opportunity to identify strengths and gaps in staff competencies. Keep privacy, trust, and anonymity in mind when assessing staff. Consider collecting and reviewing existing workforce assessment surveys that have been conducted over the last few years to inform the workforce planning process.	✓	✓	✓

Assessing Training Needs

Assessing training needs is an essential component of workforce planning and aligns with a focus on a learning culture. Agencies may consider annual training plans at the agency and/or individual level to guide training. Assessing training needs can include:

- Mandated training requirements:** The agency, state or profession may have mandated training requirements. Examples might include Cardio Pulmonary Resuscitation (CPR), Continuing Education Units (CEU) for specific professions, or agency specific cybersecurity training.
- Core Competencies:** The training needs assessment can assess competencies based on one or more competency frameworks.

Competency Frameworks and Tools

Competencies and competency frameworks can be used to plan how your agency will organize your workforce, determine which job classes fit into your organization's needs, guide recruitment and retention of the workforce, inform how to manage and train staff most effectively, and develop staff to fill future vacancies.

There are various competency frameworks and tools that agencies can use to guide their workforce assessment including:

Competency Framework and Tools	Description
Strategic Public Health Skills	To address new challenges and changing priorities, the de Beaumont Foundation has worked to align Strategic Skills with widely used public health assessments and competency sets. Using the Strategic Skills framework as a basis for workforce planning, all public health professionals working to advance the 10 Essential Public Health Services and Foundational Public Health Services, regardless of discipline, focus area, or supervisory level, can learn to think strategically and systematically, manage change and resources, communicate effectively, create action from data, engage with the communities they serve, influence policy, form cross-sector partnerships, and strive for justice, equity, diversity, and inclusion.⁶
Core Competencies for Public Health Professionals	The Core Competencies for Public Health Professionals (Core Competencies) are a consensus set of knowledge and skills for the broad practice of public health, as defined by the 10 Essential Public Health Services. Developed by the Council on Linkages These competencies are organized into eight domains, representing skill areas within public health, and three tiers, which describe different types of responsibilities within public health agencies. See examples of how agencies of used competency competencies in their workforce assessments.

⁶ <https://debeaumont.org/wp-content/uploads/2021/04/Adapting-and-Aligning-Public-Health-Strategic-Skills.pdf>

Competency Framework and Tools (Continued)	Description (Continued)
Health Equity Competence Assessment	Consider conducting a health equity assessment that considers staff competence in the area of health equity. This type of assessment is a requirement within the PHAB Standards and Measures. This could be conducted within the agency or by an outside vendor with subject matter expertise. Resources • Health equity at work: Skills assessment of public health staff provides recommendations and survey questions from a nationwide pilot survey to build workforce capacity to address health equity.
Subject Matter Specific Competencies	Subject matter specific competencies can help guide staff and their supervisors on licensing or field specific training requirements. Various public health disciplines have developed competency models specific to their practice areas. The CDC has compiled a list of select public health workforce competency frameworks that support and advance public health workforce efforts. Included in the list are Performance Improvement Competencies, Public Health Law Competencies, Applied Epidemiology Competencies, Community/Public Health Nursing Competencies, Environmental Health Competencies, Applied Public Health Informatics Competencies, and others.

Organizational Culture and Workforce Well-Being

Consider including goals and objectives in your agency's workforce plan that address organizational culture and workforce well-being based on workforce assessment results. This could include implementing strategies for enhancing the public health workforce, prioritizing well-being, and utilizing frameworks that enhance workforce well-being and culture.

Strategies for Enhancing Governmental Public Health Workforce

ASTHO recommends strategies to support state, territorial, and local health department efforts to address burnout and moral injury among public health workers and improve retention. These practical recommendations include:

- Developing effective and skilled managers
- Creating positive workplace culture and connection
- Building infrastructure for a supported and fairly compensated workforce
- Staffing to advance workforce priorities and manage workloads.

Learn more: [Strategies for Enhancing Governmental Public Health Workforce... : Journal of Public Health Management and Practice \(lww.com\)](#)

Prioritizing Well-being in the Public Health Workforce

- Prioritizing mental health, self-care, and overall well-being in the workplace “can create an environment that fosters support and commits to health for all.”⁷ Integrating strategies to improve workplace wellness, organizational culture, and workforce well-being can have lasting impact on an agency's culture and the well-being of its workforce. Practical strategies for improving workplace wellness include:
- Offering Employee Support Programs
- Cultivating a Supportive Culture and Work-life Balance
- Increasing Team Cohesion and Connectedness

Learn more: [Prioritizing Well-Being in the Public Health Workforce | ASTHO](#)

Use frameworks and strategies that enhance workforce well-being and culture

Learn more: [Workforce Planning Tools: Frameworks That Enhance Workforce Well-Being and Retention | ASTHO](#).

⁷ [Prioritizing Well-Being in the Public Health Workforce | ASTHO](#)

Future Workforce Needs Considerations

Lastly, in developing your agency's workforce plan, consider these topics for the future workforce needs and how they might guide your assessment processes:

- Ability for public health agencies to competitively recruit and retain the workforce
- Population growth and demographic forecasts
- Diversification of the workforce
- Changing education, certification, credential standards and requirements
- Needs for leadership succession
- Emerging issues that would require advanced knowledge, skills, or abilities
- Impacts of artificial intelligence on the workforce including skills, recruitment, bias, and efficiencies

Tips for Assessing the Public Health Workforce

- Keep trust in mind. Staff need to be able to trust that something will be done with the results when they are assessed.
- Be transparent and timely in your communications about assessment efforts, the purpose, how the results will be used, and what will be different or better as a result.

Share the results and any next steps or actions that will be taken based on the results. Remember to maintain confidentiality.



Phase 3 – Set Priorities

Workforce priorities will likely emerge from themes and data that surfaced during the Organize and Assessment phases. [The ASTHO Strategic Planning Guide](#) is a resource for how to set priorities.



Considerations for Setting Workforce Priorities

- Workforce priorities should be forward-thinking and leverage current opportunities.
- Workforce priorities should align with, but not duplicate other plans, particularly the agency's health assessment, health improvement plan, and strategic plan.
- Strong workforce priorities will have support from key staff, leadership, and the governing entity(es).
- Develop specific goals, SMARTIE objectives, and activities (Specific, Measurable, Achievable or Action-Oriented, Relevant, Time-bound, Inclusive and Equitable). [Learn more about writing SMARTIE objectives.](#)
- Ensure that performance indicators are measurable so that Workforce Plan implementation progress can be tracked. Priorities can be at the policy, implementation, organization, program, and team levels.
- Include WF priorities in multiple broad categories based on your assessment findings, including:
 - » Retention
 - » Recruitment
 - » Administrative efficiencies
 - » Succession planning
 - » Organizational culture
 - » Knowledge management
 - » Training
- Include priorities that emphasize improvements to organizational culture, training, and professional development opportunities on DEIAB topics.



Agency Highlight: [Maine's Bureau of Human Resources](#) requires workforce plans at a minimum include broad categories in retention, recruitment, succession planning, and knowledge management.



Phase 4 – Develop the Workforce Plan

Up until now the Guide has focused on the planning process. That process sets the foundation and content for a well-structured plan that provides a roadmap for identifying, developing, and retaining a skilled and competent workforce. By following a comprehensive structure for a Workforce Plan, agencies can ensure a systematic approach to addressing workforce needs and advancing their overall mission and strategic objectives.

Workforce Plans are unique and should meet the needs of each public health agency. Common sections of a Workplace Plan are included below. This is not an exhaustive list nor is it essential to include them all.



Potential Workforce Plan Sections

- Cover Sheet on Agency Letterhead
 - » Dates Adopted and Revised
- Signature Page including Dates and descriptions of changes made
- Table of Contents
- Summary of the Workforce Planning Process
 - » Workforce Lead and Committee Members
 - » Processes for Garnering Leadership Support
 - » Organizational Change Management and Communication Processes Used
 - » Structure of the Planning Process
 - » Resources and/or Evidence use to Inform the Process
- Department Profile
 - » Mission, Vision, Values
 - » Strategic Priorities
 - » Governance Structure
 - » Description of Agency Culture
 - » Workforce Policies
 - » Collaborative Relationships (Internal and External)
 - » Links and Alignment with Other Agency Plans
 - » Workforce Assessment
 - » Organizational Environment and Agency Priorities Assessment and Results
 - » Workforce Data, Data Tools and Results



- Workforce Assessment
 - » Organizational Environment and Agency Priorities Assessment and Results
 - » Workforce Data, Data Tools and Results
 - » Training Needs Assessment and Results
 - » Competency Frameworks Used
 - » Future Workforce Needs Considerations
- Prioritization Process
- Workforce Goals, Objectives, and Activities
- Plan for Implementation, Tracking, Reviewing, and Adapting
- Summary of Challenges and Lessons Learned
- Appendices



Tips When Developing a Workforce Plan

- Align the formatting and language of the Workforce Plan with that of other agency plans e.g., strategy vs goal vs objective, etc.
- Determine the most appropriate approach to the writing and review of the Workforce Plan.
 - » Multiple writers with a review by the Lead to ensure a singular voice, followed by a review by the Workforce Planning Committee OR
 - » One lead writer with a review by the Workforce Planning Committee to ensure a singular voice
- Create an outline in advance.
- Establish who will be leading the implementation of Workforce Plan objectives and activities during the plan writing process.
- Establish the tracking, review, and adaptation processes, timelines, and performance indicators, during the plan writing process.
- Determine how the Workforce Plan will be communicated to staff and leadership on a regular basis and how it will be accessed.



Resources and Tools for Developing a Workforce Plan

Resource/Tool	Description
PHAB Workforce Plan Template and User Guide	The template aligns with workforce-related requirements as set forth in the Standards and Measures for Initial Accreditation. Use of the template does not guarantee conformity and departments pursuing initial accreditation, reaccreditation or pathways recognition should always refer to the associated standards and measures for more information and guidance. Furthermore, this Workforce Plan Template can be used for public health agencies, irrespective of their intent to apply.
Webinar: Developing a Workforce Development Plan – Public Health Foundation	This interactive session discussed the basics of workforce development planning and action. Attendees explored why workforce development is important, how workforce development plays a role in health department accreditation, how retention and recruitment relate to workforce development planning, and opportunities to better meet workforce development needs within your organization.
Workforce Development Facilitation Guide for Small Health Departments – Montana Public Health Institute	This guide aims to facilitate the creation of health department-specific competencies for local and tribal health departments in Montana and aids in the creation of a tailored and actionable workforce development plan.
Creating a Learning Agenda for Systems Change: A Toolkit for Building an Adaptive Public Health Workforce	The Learning Agenda can facilitate deeper, more robust stages of learning that can increasingly impact systems change in connection with workforce planning.
Public Health Training Center Network	Regional Public Health Training Centers offer support in conducting needs assessments, drafting workforce plans, and provide training and technical assistance on workforce planning.

Phase 5 – Implement, Track, Review, and Adapt

Following the development of the Workforce Plan, your agency will implement the goals, objectives, and activities detailed in the plan. Below are considerations and strategies for the four components of this phase: implement, track, review, and adapt.

Implementation

- **Assign a Workforce Plan Implementation Lead.** This individual is not responsible for the entirety of the workforce plan implementation but ensures that the work is happening. For example, there may be a tracking system for workforce plan goals and objectives and the lead is responsibility for ensuring that progress on measures is tracked and reported on a regular basis.
- **Assign Additional Objective Leads.** These individuals may be members of the Workforce Planning Committee or may include others in the agency who have roles aligned with WF Plan objectives.

Tracking

- **Establish Performance Indicators.** Define clear and measurable performance indicators that align with the objectives of the workforce plan. These indicators should reflect the desired outcomes, such as increased competencies, improved retention, or enhanced employee psychological safety.
- **Implement Data Collection Mechanisms.** Set up systems and processes to collect relevant data regularly. These systems may involve automated data collection tools, surveys, periodic assessments, or ongoing tracking of specific metrics.
- **Use Project or Performance Management Software.** Use a performance management system that your agency currently uses to track organizational goals and progress to track workforce efforts, too. Project management software often includes dashboards and visuals with colors to depict progress and will ensure full integration into organizational operations.

Review

- **Include a Regular Review Period.** Determine a review period, e.g., annual, in the Workforce Plan to ensure that adjustments can be made based on changes to agency priorities, resources, new data, etc.
- **Analyze and Interpret Data.** Regularly analyze the collected data to assess progress and identify deviations or trends. Compare the data against established performance indicators and benchmarks to determine whether the agency is meeting the objectives.
- **Adjust and Improve.** Use the insights gained from data analysis to make informed decisions and adjust the Workforce Plan. Use the monitoring process as an opportunity for continuous improvement by implementing lessons learned and best practices.
- **Communicate Progress.** Regularly communicate the progress of the Workforce Plan to staff and external partners. This includes updating on achievements, challenges, and any adjustments made based on monitoring findings. Transparent communication fosters accountability maintains staff and partner engagement and ensures that all parties are informed about the status of the plan.

Adapt

- Treat the Workforce Plan as a Living Document. The Workforce Plan should be subject to ongoing review, adaptation, and updates based on changing circumstances. Encourage ongoing engagement with key personnel for periodic review and adjustment of the Workforce Plan. Use insights from implementation to inform future planning efforts.

Resources

- » [CDC's Types of Evaluation](#)
- » [Colorado's Guide to Selecting Performance Measures](#)
- » [ASTHO's Performance Management Dashboard Tool](#)
- » [ASTHO's STAR Center Capacity Indicators](#)



Pillars for Success

This guide recommends three pillars for success in the workforce planning process: ongoing communications; diversity, equity, inclusion, accessibility and belonging (DEIAB) considerations; and fostering a learning culture.

Communication

Ongoing and consistent communication keeps leadership, partners, and staff informed of the steps of the process, what to expect, and how to be involved. Communication supports buy-in and enhances the agency's learning culture. It is critical that workforce planning is a priority on the leadership agenda and that updates are bi-directional. Communication can occur both informally and formally, and a multifaceted approach is encouraged.

Consider various ways to engage staff, agency leadership, and external partners in communications, including visuals, trivia, games, and appropriate humor.

Diversity, Equity, Inclusion, Accessibility, and Belonging Considerations

Embed diversity, equity, inclusion, accessibility, and belonging (DEIAB) considerations throughout the workforce planning process. Consider the following:

DEIAB Workforce Planning Checklist	Notes and Actions Steps:
☐ Is your workforce planning committee diverse (race, age, gender, disability status, focus area, geography, role, perspectives, etc.)? Some agencies or community partners may have dedicated offices or positions focused on DEIAB. Consider consulting with DEIAB champions or experts in your agency or in the community.	
☐ Have committee members participated in implicit bias training to be aware of unconscious bias? Could they take training beforehand or as a team building activity? Is a job aide available?	
☐ Are meeting agendas structured in a way that ensures everyone's ideas are heard and considered equally and equitably?	
☐ What conditions have been created for a psychologically safe space so that all can share thoughts without consequences?	
☐ Where does bias show up your data? Was there bias in the collection of the data? Did some groups have more access to providing their input? Is the data tending to favor or disfavor certain groups (e.g., different office locations, teams/bureaus/divisions, job classifications, gender, etc.)?	
☐ How will the output of your workforce planning affect certain groups?	
☐ What needs to happen to make the process or output communication accessible?	
☐ Do the activities planned from this process incorporate methods to prevent fear of or actual retaliation?	
☐ What measures are taken to build trust among staff and ensure that surveys are confidential (e.g., using an external vendor)? How are results shared with staff?	
☐ How is the workforce expected to benefit from workforce planning? Who might be marginalized or harmed? What are potential unintended consequences and impacts we should keep in mind?	



DEIAB Workforce Planning Resources

- [Toolkit: Building an Equitable Workplace at Local Health Departments - NACCHO](#)
- [Strategic Plan to Advance Racial Equity, Diversity and Inclusion-Oregon Metro](#)
- [Racial Equity Action Plan – City and County of San Francisco](#)

Culture of Learning

A thoughtfully implemented workforce planning process can support an agency's learning culture.

A learning culture is an agency environment that values continuous learning and professional development. It means fostering a culture where employees are encouraged and supported in pursuing knowledge, skills, and competencies necessary for their roles. A culture of learning promotes a mindset of curiosity, innovation, and adaptability. A strong learning culture contributes to employee engagement, retention, and the overall effectiveness of public health services.

To establish and nurture a learning culture in public health agencies, consider the following strategies.

- **Foster Learning and Development Opportunities:** Growth experiences may include training programs, workshops, conferences, webinars, and online courses. Resources such as the Public Health Foundation's TRAIN Learning Network (<https://www.train.org>) and the [Public Health Training Center Network](#) provide public health professionals with various training options.
- **Use Knowledge Sharing Platforms:** Technology platforms for collaboration such as shared databases, intranets, and discussion forums provide opportunities where staff can exchange ideas, share best practices, and learn from one another.
- **Provide Mentoring and Coaching Opportunities:** Pairing seasoned professionals with less experienced colleagues or colleagues with different focus areas who are interested in other areas of public health, promote continuous learning and facilitates knowledge transfer, skill development, and professional growth.
- **Recognize Staff:** Recognition for learning and development accomplishments reinforces a growth culture and may include awards, incentives, and career advancement opportunities for individuals and teams.
- **Ensuring Opportunities for Regular Feedback:** Providing regular feedback and evaluation mechanisms to help employees understand their strengths and areas for improvement contribute to a culture of learning. Feedback should be constructive, actionable, and linked to learning and development goals. Performance evaluations can identify areas where additional training or development opportunities may be beneficial.
- **Prioritize Organizational Support:** Leadership should allocate resources, encourage participation in learning activities, and provide time for staff to engage in professional development. Creating a supportive environment that values and prioritizes learning fosters a culture of continuous improvement.
- **Collaborate with External Partnerships:** Collaborating with external organizations, such as the [Public Health Training Center Network](#), the [Public Health Foundation's Academic Health Department Learning Community](#), academic institutions, and other public health agencies, can provide access to additional learning resources, expertise, and networking opportunities. Building partnerships can enhance workforce planning efforts and promote knowledge exchange.

By embracing a culture of learning, agencies can adapt to new challenges, foster innovation, and ultimately improve public health outcomes.

Common Challenges and Tips to Resolve

Throughout the Workforce Planning process, challenges may arise that need to be addressed.

Common Challenges	Recommendations to Address
Focusing on too much at once	Narrow the focus. Narrowing the focus can help to make substantial progress in implementation to build positive momentum and a sense of accomplishment. Acknowledge that this Workforce Plan is a living document and can be adapted and broken down into manageable objectives and activities. Start with what you have, knowing that the plan will grow and develop over time.
Gaps in understanding and documentation	Get organized. This may include keeping a running document of high-level planning meeting notes, decisions, and action items highlighting who is responsible and deadlines. Consider keeping files in a shared location.
Workforce Lead does not have enough time to devote to the work	Explore support from partner organizations. This may include your state Public Health Training Center, a state public health institute, or an outside consultant. Actively and collaboratively support the Workforce Plan implementation lead's workload to set them up for success. If the lead is at capacity, reassess priorities, delegate, or pause other work.

Additional Resources

- [Division of Workforce Development | CDC](#)
- [Public Health Workforce | ASTHO](#)
- [Public Health Hope, Equity, Resilience, and Opportunity \(PH-HERO\) Initiative | ASTHO](#)
- [Public Health Infrastructure and Systems Improvement | ASTHO](#)
- [Home - Public Health Infrastructure Grant \(phinrastructure.org\)](#)
- [The Public Health Training Center Network \(PHTCN\) - NNPHI](#)
- [Transforming the Public Health Workforce - Public Health Accreditation Board \(phaboard.org\)](#)
- [CWORPH - Center for Public Health Systems - School of Public Health - University of Minnesota \(umn.edu\)](#)