

Organize Phase 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.	
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	
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 • ASTHO Change Management Training Series	

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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. • 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. • 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.	

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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. » 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	