Comprehensive Workforce Plan Template

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Tips for Using the Template

Welcome and thank you for accessing the **Comprehensive Workforce Plan Template**. This template is designed as a companion document to the ***Comprehensive Workforce Plan Toolkit Framework*** document and outlines key areas, questions, and resources that will help your Health Center as you develop a Comprehensive Workforce Plan that addresses your workforce needs and plans for teaching and training students.

A comprehensive workforce plan is not a static document and needs continuous revision as the landscape of the Health Center workforce rapidly changes. For this reason, the Template and Toolkit will both remain ever-evolving.

This template is divided into categories that outline essential components to consider when developing your Health Center's comprehensive workforce plan. Each area contains important questions and components to consider when assessing your Health Center's workforce needs, and, where applicable, links to pertinent resources are provided.

Once again, we welcome each of your Health Centers to use, develop, adapt, and apply the Comprehensive Workforce Plan Template to meet the needs of your Health Center workforce and student training needs.

If you have any questions or resources, you would like included in the toolkit, please feel free to reach out to Suubi Mondesir, from NJPCA at mdariano@njpca.org.

Workforce Strategic Direction

To begin your health center's comprehensive workforce plan, first, take a minute to reflect on your Health Center's strategic direction, and what drives your workplace's efforts. Understanding your Health Center's mission, vision and goals will provide the guiding principles for your comprehensive workforce plan.

What is your organization's mission statement?

What is your organization's vision statement?

What are your strategic goals/workforce priorities?

Notes:

Template Tip:

Feel Free to include any notes here as you go along!

The right people, in the right place, at the right time

Use the questions below to help understand the current state of your workforce, and who should be included in workforce planning.

Stakeholders Involved

List of Internal and External Stakeholders Involved in Workforce Planning	

Workforce Pulse Check

What workforce metrics and staff and patient feedback do you already collect?	
Are there challenges within your organization that you know need to be addressed?	
What does your workforce needs assessment and/or community assessments indicate and how will it impact the future of your workforce?	
How will you engage stakeholders in developing your workforce strategic plan?	
Initiatives for ensuring cultural competence and representation among staff and workforce	
Opportunities for improvement in ensuring cultural competence and representation among staff and workforce	

Notes:

Resources:

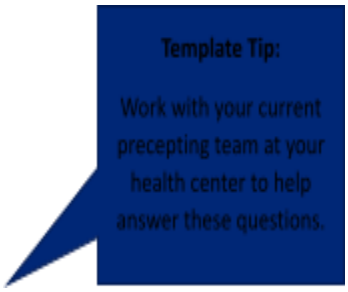
- ACU Strategic Planning Document: (https://chcworkforce.org/web_links/star%c2%b2-center-strategic-workforce-planning-workbook/)
- STAR2 Center Financial Assessment Tool for Provider Turnover (https://chcworkforce.org/web_links/star-center-financial-assessment-tool/)
- STAR2 Center Employee Engagement Webinar: (https://chcworkforce.org/videos/manager-training-for-employee-engagement-part-2/)

Template Tip:

These resources and links will provide you with tools to help with your workforce planning efforts.

Workforce Pipeline Initiatives

Use the tables below to categorize your ***current*** health professions programming by discipline and education level/target audience.



Current HP-ET Programs

Examples: (K-12, Undergraduate)

Discipline	K-12 Students	Undergraduate Students (Including Community College and Technical/Vocational Programs/Apprentice ship)	Graduate (Medical Students, Dental Students, APRNs, MSW/LISW)	Residents
Medical				
Physician Assistants				
APRNs				
Dental				

Current HP-ET Programs (continued)

Examples: (K-12, Undergraduate)

Discipline	K-12 Students	Undergraduate Students (Including Community College and Technical/Vocational Programs/Apprentice ship)	Graduate (Medical Students, Dental Students, APRNs, MSW/LISW)	Residents
Behavioral Health				
Pharmacy				
Nursing				
Allied Health Services				
Non-Clinical				
Other (Optometry/Vision Services, CHW)				

Workforce Pipeline Initiatives

Use the tables below to categorize and plan for your ***future*** health professions programming by discipline and education level/target audience.

Template Tip:

Work with your current precepting team at your health center as well as leadership to help answer these questions.

Growth Goals/Future HP-ET Programs

Examples: (K-12, Undergraduate)

Discipline	K-12 Students	Undergraduate Students (Including Community College and Technical/Vocational Programs/Apprenticeship)	Graduate (Medical Students, Dental Students, APRNs, MSW/LISW)	Residents
Medical				
Physician Assistants				
APRNs				
Dental				

Growth Goals/Future HP-ET Programs (continued)

Examples: (K-12, Undergraduate)

Discipline	K-12 Students	Undergraduate Students (Including Community College and Technical/Vocational Programs/Apprenticeship)	Graduate (Medical Students, Dental Students, APRNs, MSW/LISW)	Residents
Behavioral Health				
Pharmacy				
Nursing				
Allied Health Services				
Non-Clinical				
Other (Optometry/Vision Services, CHW)				

Template Tip:

HP-ET stands for Health Professions Education and Training

HP-ET Programming

Strengths for education and training	
Limitations for education and training	
Who oversees managing students? (Ownership of HP-ET)	
What are your student rotation and orientation processes?	
What is your student policy?	
Student Support Services Offered	
Student evaluation process	
Process for tracking students	

Notes:

Resources:

- Weitzman Institute – https://www.weitzmaninstitute.org/wp-content/uploads/2022/02/NI_ResidencyBook.pdf *(book)*

Recruitment, Retention & Staff Advancement

Recruitment

Considerations for recruitment planning

- Are your mission and vision reflected in your practices?
- How do your activities promote diversity, equity, and inclusion?
- What makes your Health Center unique and how are you promoting that?

Topic	Current Practice	Gaps/Opportunities	Needs	Strategies	Goals
Job opening promotion					
Job description aspects					
Online presence					
Community presence					
Candidate review process					
Interview process					
Organization onboarding and orientation					
Community integration					

Provider-specific recruitment considerations

Topic	Current Practice	Gaps/Opportunities	Needs	Strategies	Goals
Provider community integration					
Spouse and family					

community integration					
Student loan repayment promotion					
Preceptorship, scholarship, and/or research opportunities					
J1 Visa recruitment					

Retention & Staff Advancement

Considerations for retention planning

- What retention data do you have available? (ex. Turnover, satisfaction, and salary surveys)
- How do your activities promote diversity, equity, and inclusion?
- What is the employee culture at your Health Center? Does this reflect your mission and vision?

Topic	**Current Practice**	**Gaps/Opportunities**	**Needs**	**Strategies**	**Goals**
Staff recognition					
How is staff satisfaction measured?					
How is performance measured and communicated to staff?					

Financial incentives					
Non-traditional incentives (staff volunteer days, remote options, free food)					
Employee wellness					
Exit evaluation (interview and/or survey)					
Professional development					
Advancement opportunities					

Notes:

Resources:

- SHRM article on alternatives to traditional employee evaluation: https://www.shrm.org/hr-today/news/all-things-work/pages/performance-management-evolves.aspx
- Workplace Well-Being Resource: STAR2 Center Burnout Self-Assessment Tool (https://forms.logiforms.com/formdata/user_forms/68725_123124/361775/page1.html?cachebust=368); STAR2 Center Clinician Wellbeing Bundle (https://chcworkforce.org/bundle/burnout/)

Workforce Compliance Optimization Checklist

Use the checklist below as a guide for ensuring your health center ensures compliance with all workforce-related regulatory rules and legislation.

- ☐ Health Center has a credentialing/privileging compliance plan that accounts for:
  - Background checks and employee screening
  - C&P webinars
  - Credentialing with Insurance Providers
  - FTCA/Malpractice requirements
  - OIG Exclusion List
- ☐ Health Center has succession plans for leadership
- ☐ Staffing Requirements – health center recruits, develops, engages, and retains the appropriate staffing mix of qualified providers and staff needed to provide safe and culturally affirming care to its patient population.
- ☐ Health Center has a process for ensuring compliance with State and Federal workforce and employment laws, including but not limited to:

- Fair Labor and Standards Act
- FMLA
- HIPAA
- OSHA
- ADA
- Anti-Discrimination - Title VII of the Civil Rights Act
- J1-Visa
- Section 1557 of the ACA
- Title X