

# Comprehensive Workforce Plan Template

# Introduction

Welcome and thank you for accessing the Comprehensive Workforce Plan Template. This template is designed to outline 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 will evolve.

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.

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 to share, please feel free to reach out to Emma Kelley, Recruitment and Workforce Development Specialist, at [ekelley@iphca.org](mailto:ekelley@iphca.org).

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# Assessment

## Workforce Strategic Direction

Mission

Vision

Values

Strategic Workforce Goals

DEI Policy

## Current State Analysis

**Stakeholders**

|  |  |
| --- | --- |
| Internal | External |
| *List names and titles of your recruitment/workforce team and their roles.* | *List external partnerships and the role that these partners play in your recruitment strategy.* |

## Current State Analysis (continued)

**Metrics**

Turnover

*Describe how your organization monitors and assesses turnover. Assess the cost of turnover.*

Recent Employee Satisfaction Results

*State the results of your most recent employee satisfaction survey. State your organization’s goal results when conducting these surveys.*

Salary Benchmarking

*List what sources your organization uses to gather salary information. State how often you review salaries internally.*

**Workforce Challenges/Barriers to Success**

*Describe what challenges your organization encounters when recruiting and retaining employees (e.g. local/national market trends, retirement rates, compensation, etc.).*

**Current DEI Practices and Policies**

*Describe the demographics of your staff. List the strategies your organization employs to ensure diversity, equity, and inclusion in your hiring practices and workplace culture.*

# Retention Strategy

**Retention Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic** | **Current Practice** | **Gaps/**  **Opportunities** | **Needs** | **Goals** |
| Staff recognition |  |  |  |  |
| How staff satisfaction is measured |  |  |  |  |
| How staff performance is measured and communicated |  |  |  |  |
| Financial incentives (bonuses, productivity incentives, etc. |  |  |  |  |
| Non-traditional incentives (staff volunteer days, remote options, free food, etc.) |  |  |  |  |
| Employee wellness and burnout prevention |  |  |  |  |
| Exit evaluation (interview and/or survey) |  |  |  |  |
| Professional development opportunities |  |  |  |  |
| Advancement opportunities/ career paths |  |  |  |  |

# Retention Strategy (continued)

**Provider-Specific Retention Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic** | **Current Practice** | **Gaps/**  **Opportunities** | **Needs** | **Goals** |
| Provider community integration |  |  |  |  |
| Spouse and family community integration |  |  |  |  |
| Preceptorship scholarship, and/or research opportunities |  |  |  |  |
| Team-based care |  |  |  |  |
| Other |  |  |  |  |

**Employee Satisfaction/Engagement Surveys**

*Describe your policy, timeline, and process for disseminating results. You can include the survey your organization uses in an Appendix.*

# Retention Strategy (continued)

**Burnout Prevention and Employee Wellness**

*Use the chart below to assess and describe the policies and practices that your organization employs to prevent burnout and improve employee wellness. List your opportunities for improvement and what you will need to make these improvements. Finally, list your goals/describe your goal state.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Policy/Practice** | **Current Practice** | **Gaps/**  **Opportunities** | **Needs** | **Goals** |
| Policy/Practice #1 |  |  |  |  |
| Policy/Practice #2 |  |  |  |  |
| Policy/Practice #3 |  |  |  |  |

# Recruitment Strategy

*Use the chart below to assess and describe the components of your organization’s recruitment strategy. List your opportunities for improvement and what you will need to make these improvements. Finally, list your goals/describe your goal state.*

**Recruitment Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic** | **Current Practice** | **Gaps/**  **Opportunities** | **Needs** | **Goals** |
| Job opportunity promotion (avenues used) |  |  |  |  |
| Job description structure and components |  |  |  |  |
| Online presence (website and social media) |  |  |  |  |
| Community presence |  |  |  |  |
| Candidate review process |  |  |  |  |
| Interview process |  |  |  |  |

**Provider-Specific Recruitment Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic** | **Current Practice** | **Gaps/**  **Opportunities** | **Needs** | **Goals** |
| Student Loan Repayment and Promotion |  |  |  |  |
| J1 Visa Recruitment |  |  |  |  |
| Sign-On Bonus/Retention Bonus |  |  |  |  |

# Strategic Workforce Plan (Pathway Building Activities)

**Strategic Workforce Plan Summary Statement**

[Health center name]’s strategic workforce plan involves partnerships with schools and programs that position our health center to create pathways for a highly qualified, mission-driven, and diverse workforce to join our talent pool.

*Use the table below to outline the current health professions education and training (HP-ET) programs and partnerships your organization uses to develop its pathways to employment.*

*The columns describe students your organization trains. The rows describe the profession for which the students are training.*

**Current Health Professions Education and Training (HP-ET) – In-House and Partnerships**

|  |  |  |  |
| --- | --- | --- | --- |
| **Discipline** | **K-12 Students** | **Undergraduate (Including Community College and Technical/ Vocational Programs/ Apprenticeships)** | **Advanced Degree (Resident Physicians, APRN, Dentists, etc.)** |
| Medical Students |  |  |  |
| Physician Assistant Students |  |  |  |
| APRN Students |  |  |  |
| Dental (DDS/DMD, RDH, DA) Students |  |  |  |
| Behavioral Health (BSW, CADC, MSW, LCSW, LCPC, Psychology) Students |  |  |  |
| Pharmacy Students |  |  |  |
| Nursing (RN, LPN, etc.) Students |  |  |  |
| Allied Health Students |  |  |  |
| Non-Clinical Students |  |  |  |
| Other |  |  |  |

# Strategic Workforce Plan (continued)

*Use the table below to outline health professions education and training (HP-ET) programs and partnerships your organization plans to develop over the next 1-3 years.*

**Future Planned/Goal Health Professions Education and Training (HP-ET) – In-House and Partnerships**

|  |  |  |  |
| --- | --- | --- | --- |
| **Discipline** | **K-12 Students** | **Undergraduate (Including Community College and Technical/ Vocational Programs/ Apprenticeships)** | **Advanced Degree (Resident Physicians, APRN, Dentists, etc.)** |
| Medical Students |  |  |  |
| Physician Assistant Students |  |  |  |
| APRN Students |  |  |  |
| Dental (DDS/DMD, RDH, DA) Students |  |  |  |
| Behavioral Health (BSW, CADC, MSW, LCSW, LCPC, Psychology) Students |  |  |  |
| Pharmacy Students |  |  |  |
| Nursing (RN, LPN, etc.) Students |  |  |  |
| Allied Health Students |  |  |  |
| Non-Clinical Students |  |  |  |
| Other Students |  |  |  |

# Succession Planning

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Staff** | **Staff Age Range** | | | **Over Age 50** | | | **All Ages** | |
| **< 50** | **51 - 60** | **61+** | **Discussed retirement? (Y/N)** | **Planned Age for Retirement** | **Major Leave Plans** | | **Expected Changes in FTE** |
| Employee Name, Chief Executive Officer |  |  |  |  |  |  | |  |
| Employee Name, Title |  |  |  |  |  |  | |  |
| Employee Name, Title |  |  |  |  |  |  | |  |