Recommendations

Practical approach toolkit: Using data to strengthen workforce planning

These recommendations are grounded in the development of, and real-world learning from, NHS Humber and North Yorkshire Integrated Care Board's People Story Dashboard, a system-wide tool that strengthens strategic planning by bringing together population, health, care and workforce data in one place. Each recommendation outlines practical actions that support meaningful, evidence-based improvements across the system.

At the end of this resource, you'll find supporting materials to help you apply and embed this approach.

Planning and preparing	Yes	No	N/A
Agree what the dashboard must deliver and which core questions it should answer for system decision-makers: ■ Identify the specific decisions users routinely make that require better evidence. ■ Clarify which teams will depend on the insights and how they will apply them. ■ Establish a practical scope so development remains realistic and focused. ■ Work collaboratively with NHS, local authority, Voluntary, Community and Social Enterprise (VCSE) and education partners to ensure the dashboard reflects shared priorities and collective needs.			
Action			

Planning and preparing	Yes	No	N/A
Decide early which geographic detail is necessary to ensure insights are genuinely useful for local planning: ■ Determine which topics need small-area analysis to guide meaningful action. ■ Assess data suitability and privacy constraints before committing to detailed views. ■ Agree common boundaries early so all datasets integrate consistently.			

Action

Planning and preparing	Yes	No	N/A
Create a simple development timeline showing early releases, testing points and initial plans for when future enhancements may be possible: ■ Use short development cycles that gradually release useful components. ■ Inform partners about key release points so they can prepare for changes. ■ Reserve time to test, refine and reassess ideas before committing further resources.			

Action

Digital and technology	Yes	No	N/A
Select a platform that supports broad access, ongoing updates and expansion as new datasets and features arise: ■ Choose tools already supported locally to reduce technical barriers and delays. ■ Confirm that any publicly available outputs meet organisational publishing requirements. ■ Build a structure that can easily incorporate additional data sources.			

Action

Digital and technology	Yes	No	N/A
Standardise incoming data so users experience consistent definitions, formats and terminology across all content: ■ Agree shared structures for different data types to streamline processing. ■ Align naming conventions so similar measures look and behave consistently. ■ Clearly label what each dataset includes and excludes to avoid misinterpretation.			

Action

Digital and technology	Yes	No	N/A
Design the dashboard so users with different digital skills can navigate confidently and understand insights easily: ■ Present content in clear sections that guide users logically through options. ■ Reduce unnecessary clicks by simplifying navigation to key insights. ■ Provide brief, well-placed explanations near complex charts or metrics. ■ Build accessibility and visual clarity into all dashboard elements to ensure all audiences can use the dashboard fully.			

Action

Digital and technology	Yes	No	N/A
Keep the delivery team focused yet flexible, expanding capacity as workload and dashboard usage increase: ■ Begin with essential roles until wider adoption increases demand. ■ Add additional support when data refresh cycles intensify workload. ■ Develop contingencies to avoid over reliance on a single specialist.			

Action

Financing and investment	Yes	No	N/A
Use free or existing datasets wherever possible to limit costs and reduce unnecessary complexity: ■ Prioritise publicly accessible datasets when building new features. ■ Collaborate with partners to share relevant information at no extra cost. ■ Use paid data only to address critical gaps where alternatives do not exist.			
Action			

Financing and investment	Yes	No	N/A

Communicate long-term maintenance needs clearly so partners understand ongoing commitment and resourcing:
 	
  ■ Monitor the time required each month for data updates and improvements.
  ■ Share resourcing implications openly to manage expectations effectively.
  ■ Reassess capacity before undertaking major expansions or redesigns.			

Action

Financing and investment	Yes	No	N/A
Show early value by sharing practical examples that demonstrate benefits and encourage continued investment: ■ Collect specific cases where insights influenced decisions meaningfully. ■ Share stories showing improvements across multiple organisations or teams. ■ Use feedback to refine development and strengthen the case for support.			

Action

Involving key stakeholders	Yes	No	N/A
Engage diverse partners early so the dashboard reflects varied needs and strengthens system-wide ownership: ■ Include representatives from sectors with different information needs. ■ Seek insights on where data is missing or difficult to obtain. ■ Maintain regular dialogue to reinforce collaborative ownership. ■ Provide regular demonstrations and walk throughs to gather user feedback and ensure ongoing relevance.			
Action			

Involving key stakeholders	Yes	No	N/A
Provide practical user support through simple tools and short guidance rather than extensive documentation: ■ Offer a short introductory guide tailored to new users. ■ Deliver optional bite size training for teams with specific needs. ■ Refresh guidance materials whenever the dashboard evolves.			

Action

Involving key stakeholders	Yes	No	N/A
Share updates widely so partners remain aware of new features and confident using the dashboard regularly: ■ Use newsletters and message channels to share changes promptly. ■ Demonstrate updates during existing meetings or forums. ■ Encourage local teams to circulate improvements within their networks.			
Action			

Governance and implementation	Yes	No	N/A
Embed oversight within established governance so responsibilities, decisions and reporting remain clear and familiar: ■ Report development progress to established system committees routinely. ■ Use recognised governance processes for approving major changes. ■ Share risks openly so partners understand potential implications.			
Action			

Governance and implementation	Yes	No	N/A
Maintain strong rules for how data is used and displayed to protect privacy and meet legal duties: ■ Document specific data permissions for each dataset included. ■ Review sensitive information carefully before public release. ■ Present limitations clearly so users understand data boundaries.			

Action

Governance and implementation	Yes	No	N/A
Keep decision-making efficient by recording reasoning simply and enabling quick resolution of changes: ■ Summarise decisions with short written notes for future reference. ■ Avoid prolonged approval cycles for routine updates. ■ Empower small groups to make timely decisions where appropriate.			

Action

Governance and implementation	Yes	No	N/A
Use clear data-sharing agreements to support consistent, reliable information flows between all partners: ■ Request consistent monthly submissions in an agreed format. ■ Provide simple mechanisms for partners to update data promptly. ■ Review agreements annually to ensure they remain fit for purpose.			

Action

Pilot, refinement and embedding	Yes	No	N/A
Release early versions so users can test functionality and shape direction before major development occurs: ■ Share early prototypes to gather immediate hands-on reactions. ■ Prioritise usefulness over completeness in early releases. ■ Adjust approaches swiftly based on testing insights. ■ Continue refining features based on real world feedback to ensure the dashboard evolves in line with operational needs.			

Action

Pilot, refinement and embedding	Yes	No	N/A
Apply consistent design standards so navigation feels predictable and intuitive across the whole dashboard: ■ Use matching chart types where information types are similar. ■ Replace jargon with simple, accessible language throughout.			

Action

Pilot, refinement and embedding	Yes	No	N/A
Develop a clear roadmap outlining upcoming improvements and inviting partner suggestions for future features: ■ Share planned enhancements with transparent time frames and expected benefits. ■ Invite partners to suggest features aligned with their needs. ■ Review and adjust the roadmap regularly to stay relevant.			

Action

Outcomes, impact and learning	Yes	No	N/A
Monitor usage across teams to understand reach, identify strengths and highlight where support is needed: ■ Track engagement patterns across different sections and organisations. ■ Gather feedback on how insights supported specific actions. ■ Identify groups requiring additional help or guidance.			

Action

Outcomes, impact and learning	Yes	No	N/A
Capture early impact examples to show progress while long-term results continue to develop: ■ Note examples where decisions were made more confidently. ■ Record cases where services were targeted more appropriately. ■ Share immediate benefits to reinforce the dashboard's value. ■ Gather real-world stories and user examples to illustrate how insights support planning and improvement across teams.			

Action

Outcomes, impact and learning	Yes	No	N/A
Review lessons learned regularly so design, processes and development become stronger over time: ■ Hold debrief sessions to explore what worked and what didn't. ■ Record insights and challenges for future builds. ■ Adapt methods based on accumulated learning.			

Action

Further support

- Adult Social Care Workforce Data Set (ASC-WDS)/Workforce Intelligence reports – Use workforce data to evidence the case for change, and identify issues, opportunities and risks.
- Integration – access guidance and resources to help adult social care leaders work effectively with integrated care systems (ICSs) to deliver seamless, person centred care through cross sector collaboration.
- Operational workforce planning – access practical guidance, templates and training resources to help adult social care providers carry out effective operational workforce planning using the analyse-plan-do-review model to ensure safe, skilled and future ready staffing.
- Workforce change and transformation – access guidance and resources on applying seven principles of workforce redesign to support organisations undergoing workforce change and transformation.
- Using technology in social care – use guidance, tools and support to help adult social care providers understand, adopt and use digital technologies effectively to improve care quality, efficiency and digital readiness.
- The Care Workforce Pathway – Develop your workforce with clear roles and career progression.