

Checklist for workforce planning

A. Plans for the future - Vision for the organisation - identify the organisation's direction.
Review and analyse the following:

Where are we heading?

- Anticipated changes to the organisation's mission statement/services
- Anticipated volume, type and location of work to be done
- Changes in organisational structure- changes/additions to positions
- Past trends/experiences in organisational change/development- what have you learned?
- Management strengths
- Skills/knowledge matrix for current staff
- Demands on staff
- Anticipated budget/funding levels
- Anticipated environmental factors e.g. legislative changes, technological changes, social changes

B. Current resources

Where are we now?

- Conduct skills/knowledge analysis at individual, team and agency level
- Ensure up-to-date position descriptions/organisational chart
- Examine recruitment/retention data
- Profile current employees- e.g. opportunities for EEO

C. Needed resources

What do we need to happen?

- Forecast specific needs as dictated by the vision for the organisation
- Forecast required positions/skills/knowledge

Compare current available resources with needed resources for the future

D. Action Plan - Determine how you will meet required needs

How are we going to get there?

Address immediate human resource issues

Identify internal sources of workers

Identify external sources of workers

Job redesign

Training and professional development

Succession planning

Organisational restructuring

Management's roles/responsibilities

Staff roles/responsibilities

Costs

Outcome measures

Avenues for feedback