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# Workforce Planning Checklist

1. **Strategic Planning.** Identify the organization’s direction. Review and analyze the following:
	1. Program plans for the future

|  |  |
| --- | --- |
| [ ]  | Anticipated program/mission changes |
| [ ]  | Anticipated volume, type and location of work to be done |
| [ ]  | Changes in organization/position structures |
| [ ]  | Past patterns/trends |
| [ ]  | Anticipated supervision/managerial strengths |
| [ ]  | Skill mix of staff |
| [ ]  | Increasing/decreasing workforce demands |

* 1. Budget Condition

|  |  |
| --- | --- |
| [ ]  | Anticipated ceiling, budget philosophy, or goals |
| [ ]  | Funding levels |
| [ ]  | Compensation issues |
| [ ]  | Recruiting |
| [ ]  | Training, retraining, career development |
| [ ]  | Succession planning |
| [ ]  | Relocation costs |
| [ ]  | Increased or decreased staffing |
| [ ]  | Trends/patterns |

* 1. Anticipated Environment (Internal/Environmental Scanning) Factors

|  |  |
| --- | --- |
| [ ]  | Legislative changes |
| [ ]  | Technological changes |
| [ ]  | Social changes |
| [ ]  | Industry changes |

1. **Supply Analysis.** Determine the future availability of current staff by doing the following tasks:
	1. Conduct workforce analyses.

|  |  |
| --- | --- |
| [ ]  | Potential losses of current employees |
| [ ]  | Turnover data, retirement rates, retirement projections, promotion and award rates, etc. |
| [ ]  | Organization/position structures |
| [ ]  | Vacancies that would be created by internal movement |
| [ ]  | EEO profiles |
| [ ]  | Supervisory/non-supervisory ratio data |

1. **Demand Analysis.** Examine future activities, workloads, and workforce needs. Forecast specific staffing needs in light of mission needs and vision according to your strategic plan. Forecast overall numbers by occupations.

|  |  |
| --- | --- |
| [ ]  | By classification |
| [ ]  | By location of positions |
| [ ]  | Organization/position structures |

1. **GAP Analysis.** Compare current available resources (Supply Analysis) with needed resources (Demand Analysis) for the future.
	1. Addressing shortfalls, excess, and critical issues.

|  |  |
| --- | --- |
| [ ]  | Net human resource needs |
| [ ]  | Increase/decrease in productivity levels |
| [ ]  | Skills/grade levels |
| [ ]  | Position management |
| [ ]  | EEO profile |
| [ ]  | Under staffing or over staffing |
| [ ]  | Career progressions |
| [ ]  | Supervisory/managerial replacements |
| [ ]  | Categorize |
| [ ]  | Trends |
| [ ]  | Internal & External Factors (environmental scanning) |
| [ ]  | Set priorities to address ‘gaps’ |

1. **Action Plan.** A collection of specific activities, which will address the significant gaps identified in the gap analysis.
	1. Approaches to Action Plans

|  |  |
| --- | --- |
| [ ]  | Alignment with strategic plan |
| [ ]  | Internal resources |
| [ ]  | Recruitment |
| [ ]  | Job redesign |
| [ ]  | Training, retraining, career development |
| [ ]  | Succession planning |
| [ ]  | Productivity improvement |
| [ ]  | Restructuring (organization/positions) |
| [ ]  | Position management plan |

* 1. Develop a plan for handling Labor management issues (if appropriate)

|  |  |
| --- | --- |
| [ ]  | Legal contractual requirements |
| [ ]  | Employee involvement |
| [ ]  | Negotiations |
| [ ]  | Potential for adverse outcomes |

* 1. Implement Action Plan

|  |  |
| --- | --- |
| [ ]  | Leadership support |
| [ ]  | Communication plan |
| [ ]  | Performance measures. Milestones |
| [ ]  | Cost & people alignment |
| [ ]  | Training requirements |

1. **Monitor, Evaluate & Revise.** The outcomes should be continuously evaluated to determine progress in addressing gaps and where adjustments to strategies and action items are needed.
	1. Monitor

|  |  |
| --- | --- |
| [ ]  | Program activities |
| [ ]  | Internal & External developments |
| [ ]  | Environmental demand changes to the action plan |

* 1. Evaluate

|  |  |
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| [ ]  | Through meetings, surveys, focus groups |
| [ ]  | Performance measures and deliverables of action plan(s) |
| [ ]  | GAP trends |
| [ ]  | Organization performance |

* 1. Revise

|  |  |
| --- | --- |
| [ ]  | Based on environmental changes within the organization |
| [ ]  | Alignment with strategic plan |
| [ ]  | Success/failure of previous action plan(s) |