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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

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| --- | --- |
|  | 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.

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| --- | --- |
|  | 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.

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| --- | --- |
|  | 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

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| --- | --- |
|  | 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)

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

* 1. Implement Action Plan

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|  | 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

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| --- | --- |
|  | 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) |