

Workforce Planning Checklist

1. **Strategic Planning.** Identify the organization's direction. Project the organizational configuration ____ years from now. Review and analyze the following.

A. 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 supervisory/managerial strengths
- ____ Skill mix of staff
- ____ Increasing/decreasing workforce demands

B. Budget Situation

- ____ 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

C. Anticipated Environment (Internal/External) Factors

- ____ Legislative changes
- ____ Technological changes
- ____ Social changes

2. **Supply Analysis.** Determine the future availability of current staff by doing the following tasks.

3. Conduct work force 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

3. **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

4. **GAP Analysis.** Compare current available resources (Supply Analysis) with needed resources (Demand Analysis) for the future.

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
- Set priorities to address 'gaps'

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

A. 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

B. Develop a plan for handling Labor Management Issues (if appropriate)

- Legal and contractual requirements
- Employee involvement
- Negotiations
- Potential for adverse outcomes
- Union-Management relations climate

6. **Implement Action Plan**

- Leadership Support
- Communication Plan
- Performance Measures, Milestones
- Cost & People alignment
- Training requirements

7. **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.

A. Monitor

- Program Activities
- Internal & External developments
- Environmental demand changes to the action plan

B. Evaluate

- Through Meetings, Surveys, Focus groups
- Performance measures and deliverables of action plan(s)
- Gap trends
- Organization performance

C. Revise

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