



## Workforce Planning Checklist

1. **Strategic Planning.** Identify the organization's direction. 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 supervision/managerial strengths
    - Skill mix of staff
    - Increasing/decreasing workforce demands
  - B. 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
  - C. Anticipated Environment (Internal/Environmental Scanning) Factors
    - Legislative changes
    - Technological changes
    - Social changes
    - Industry changes
2. **Supply Analysis.** Determine the future availability of current staff by doing the following tasks:

- A. 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
  
- 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.
  - A. 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'
  
- 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 contractual requirements
- Employee involvement
- Negotiations
- Potential for adverse outcomes

C. Implement Action Plan.

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

6. **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)