This template provides the HR Team with a tool for collecting information and structuring a workforce plan. It also highlights the types of information you need to include for decision making.

With the current expansion and restructuring occurring at John Readings, a detailed and comprehensive Workforce plan is essential. This template will assist staff to methodically work through a five-step approach to workforce planning.

Each step is indicated in the template by its colour. It may not be necessary to use these colours in your final workforce plan but they are provided in the template to guide you through the framework.

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| **Workforce Planning Framework Stage 1 – Business Environment and Context** | |
| **Introduction:** | Why are you developing of a workforce plan? |
| **Strategic background and context.** | |
| **Business Profile** | Background about the business  Current status and planning for the future |
| **Mission / Vision** | John Readings Mission / Vision |
| **Environment** | The environmental scan aims to describe the current situational context, drivers of any change, and emerging conditions that may impact on the business in the next 1 – 10 years.  List key features and any changes that may impact on the services you need to provide. This could include for example changes in the sector (i.e. online/ just in time) and/or demographics  Describe the following and any other key factors that might influence the business / workforce demand:  What is the current financial situation?  Where is the business heading?  Who are JRs current and future customers?  What new technologies are emerging within the industry?  Is the company growing, downsizing, transitioning? |

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| **Workforce Planning Framework Stage 2 – Gather data of current workforce** | |
| **Workforce profile overview** | Provide a snapshot of the workforce using quantitative and qualitative data such as age, qualifications, skills, knowledge, experience, strengths and weaknesses  Do you know employees expectations? Who is stable, who is going to leave and when?  How flexible is the workforce to seasonal changes and business demands?  Conduct a SWOT analysis on the current workforce to give a clear picture on where the JR is at.  Some suggestions for what to include in the workforce profile data include:   * Current workforce (numbers FTE and headcount) by role, classification levels and employment mode (FT, PT, CAS, Contractor). * Workforce characteristics (gender, age, length of time in business; proportion of beginning, mid and established career stage * Qualifications, skills. knowledge * Retention rate breakdown by all job groups * Projected long term leave requirements – more than 28 days (e.g. long service, maternity). * Staff intentions and satisfaction levels (via a survey)   Once you have gathered all this data and examined it, use the data to illustrate your findings. |

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| **Workforce Planning Stage 3 – Future Requirements** | | | | | |
| **Workforce profile:**  **Critical roles**  **Hard to fill roles**: | Before you arrive to this stage, you need to clearly understand where the business and the industry will be in 2, 5 and 10 years’ time. Technology is changing rapidly, so it is important to take this in account when you are trying to map where the business might be in the future.  If the company cannot retain or attract employees for these job groups it is at risk of not being able to meet its regulatory or legislative requirements, or deliver the service/s planned.  Describe the job roles required, how this links to the company business objectives and reasons for the shortage  For each critical and ‘hard to fill’ role, complete the template below | | | | |
| Role: |  | | | | |
| Link to Strategic Intent and target: | Explain the link to the business goals, strategy and targets | | | | |
|  |  | Now | In 2 years | In 5 years | In 10 years |
|  | Projected demand *(how many of this job group is needed each year? This is your ‘best guess’ and should be revised as circumstances change)* |  |  |  |  |
| *Potential actions to address any shortages*  *Provide a summary of this analysis and conclusions drawn from the data examined.* | | | | | |
| Repeat for each of the critical / hard-to-fill job roles identified | | | | | |

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| **Workforce Planning Framework Stage 4a – Gap Analysis** | |
| **Overview**  **GAP #1:**  **RATIONALE**  **GOAL** | This process will compare the skills, job roles, staff numbers as well as the experience of the current workforce and what the future workforce requires.  You need to Identify any gaps that exist between your current workforce and the projected future workforce needs.  What are the key areas that require action to move the business from where it is now to where it needs to be in the future?  Once you have the “what I got” and “what I need” you can start building a workforce action plan    Large percentage of workforce is eligible for retirement  Throughout the operation, there are high percentages of employees who are eligible for retirement and significant impact is expected  Develop mechanisms through succession planning to ensure business is able to continue providing quality services to its clients |

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| **Workforce Planning Stage 4b – Action plan** | | |
| **Workforce and Development Strategies.**  In this section you should detail the strategies you would like to use to address the workforce issues identified previously in the plan, and who will be the target of your strategy. | | |
| **Area** | **Workforce Strategy**  What will you do, how will you do it and how much is it likely to cost?  What will happen if you don’t address issues and concerns? | **Target**  Who, how, when and for which job role? |
| Recruitment and selection | * For example - create a “return-to-work” program and buddy these recruits up with graduate/entry level workers * Our specific recruitment and selection strategies will include …….. | For example: Mature age workers returning to the workforce. |
| Retention | * For example - developing a mentoring program * For example - Explore level of interest in changed working arrangements e.g. full to part time. |  |
| Job design/re-design | * For example - Explore merging and separating different job-roles * For example – Outsource certain areas of the operation to contractors * Undertake research to determine how other businesses in your sector have approached this in the past |  |
| Training / Development | * For example - Explore developing a cross skilling model to share internal knowledge and resources across the business | All areas. |
| Planned attrition  (retirements, exits) | * For example – Investigate options and implement an approach to phased retirements. This may include time reductions and use of experienced workers as mentors. | Ageing workforce- initially targeting those areas that are expected to face the most attrition in the near future. |
| **Workforce Planning Stage 5 – Monitor and evaluate** | | |
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|  | * What are your plans to disseminate the information in your workforce plan across the company? * How will you use the workforce plan to monitor the workforce strategies to see if they are working? * What reporting mechanisms will you use/establish? * Is the action plan producing the workforce results that are needed? * Do I need to take any different or further action? * How and when will the workforce plan be reviewed? * How will improvements in workforce planning processes come about? | |

Finalising the workforce plan will include decisions about whether the organisation can afford the planned workforce strategies, and when the best time is to begin implementing them.