



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)