



workforce planning toolkit

a guide for workforce planning in small to medium sized
victorian public sector organisations







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The Victorian Government has vested the State Services Authority with functions designed to foster the development of an efficient, integrated and responsive public sector which is highly ethical, accountable and professional in the ways it delivers services to the Victorian community.

The key functions of the Authority are to:

- Identify opportunities to improve the delivery and integration of government services and report on service delivery outcomes and standards;
- Promote high standards of integrity and conduct in the public sector;
- Strengthen the professionalism and adaptability of the public sector; and
- Promote high standards of governance, accountability and performance for public entities.

The Authority and public sector organisations have an important role to play in demonstrating and reinforcing the Victorian public sector values and employment principles outlined in the *Public Administration Act 2004*.

The values establish the nature of our relationship with Government, the community and our work colleagues, and extend to everything we do. The principles reinforce the values. They relate to such things as merit in employment and fair and reasonable treatment of staff, and are integral to sustaining a highly effective and harmonious public sector workplace.

When taken together, the values and principles suggest a mutual responsibility between public sector employers and employees. A responsibility to work together to:

- Create pride and commitment in public sector workplaces
- Excel in the delivery of world class public services
- Earn the community's trust in the public sector
- Support the government of the day in serving Victorians.

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1 introduction

1.1 purpose of guide

This Guide was developed to provide a source of information on the common elements of workforce planning for small to medium-sized Victorian public sector organisations.

The Guide discusses workforce planning by suggesting:



what key questions to ask? – identifies the key questions to explore for each element of workforce planning.



what better practice looks like? – identifies the better practice elements of workforce planning that exist in organisations that have successfully implemented workforce planning.



a checklist to help assess the level of workforce planning in the organisation – a self assessment checklist that enables a quick assessment of the level of workforce planning within an organisation. The checklist contains a list of questions and practice examples relating to each stage of workforce planning. It can be used to measure the current level of workforce planning, as well as indicating what other actions can be implemented to further embed workforce planning within an organisation.



1.2 what is workforce planning?

At the simplest level, workforce planning is about “Getting the right number of people with the right skills in the right jobs at the right time”.

A more detailed definition is “determining and shaping the capacity and capability of the workforce that is needed to achieve an organisation’s goals and directions”.

(Auditor General Victoria Report 2004, Meeting our future Victorian Public Service workforce needs, p14)

Workforce planning is a tool that assists organisations and managers plan for the future, anticipate change, manage the workforce and meet business goals. It provides a framework for making workforce decisions that align with meeting the strategic goals of the organisation. The workforce plan identifies how future staffing and skill needs will be met (ie. via recruiting, development, internal deployment, recruitment, succession planning, etc). This ensures that planning is proactive and talent surpluses and shortages are avoided, where possible.

Workforce planning includes the following steps:

- Understanding the organisation’s strategic direction and its impact on the workforce;
- Analysing the current and future workforce needs and competencies;
- Analysing the gap between the current and future needs;
- Developing strategies to address workforce gaps;
- Implementing strategies to align the workforce with future business needs; and
- Evaluating the success of the workforce planning strategies in meeting objectives.

1.3 why implement workforce planning?

Workforce planning is the most critical human resource management challenge in the public sector today. Agencies within the Victorian public sector are operating within a challenging environment that is characterised by: devolved employment arrangements, increased demands for flexibility, responsiveness and performance improvement, a greater emphasis on innovation and service delivery, tightening labour markets, skills shortages and an ageing workforce.

It also ensures that organisations and managers plan and address, rather than just react to business and environmental changes. It establishes an integrated process for identifying, securing and developing the workforce capabilities required to support and achieve the organisation's current and future mission.

Implementing workforce planning allows an organisation to:

- Respond quickly and more strategically to change, as the organisation and managers can recognise emerging challenges in the market, workforce and business;
- Improve efficiency, effectiveness and productivity (employees possess the right skills and are a good fit for the job);
- Facilitate strategic staffing and planning for future workforce requirements (can identify staffing needs in a timely manner, monitor attrition and ensure replacements are available to fill key vacancies);
- Strengthens the organisation's capability to support the achievement of business outputs now and in the future;
- Encourages an understanding of the organisation's workforce profile, hence HR strategies and policies are aligned with maximising the capacity of the existing workforce and shaping the desired workforce;
- Assists with the identification and management of people with the knowledge critical for effective and efficient business operations, and the organisation's management of knowledge and maintenance of corporate memory; and
- Provides a mechanism for monitoring costs and directly linking expenditure of personnel against business outputs and outcomes.

Effective workforce planning requires an integrated approach amongst key stakeholders within an organisation, including senior leaders, HR professionals, business unit managers and employees.

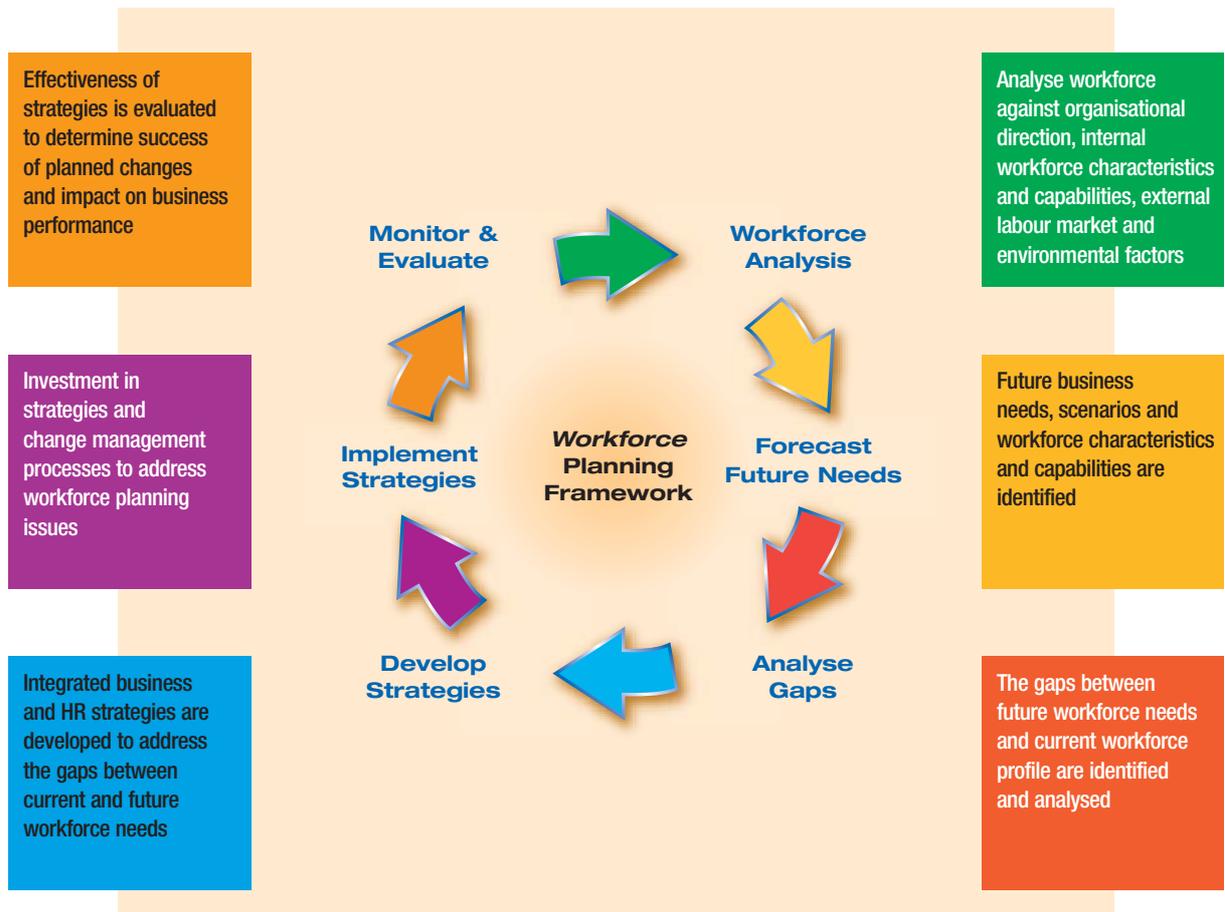


2 how to implement workforce planning

2.1 the victorian public sector workforce planning model

There are a range of approaches to Workforce Planning, however all have a common set of elements. The Victorian Public Sector Workforce Planning Model has been developed to capture the common elements of workforce planning processes that are relevant to the public sector. Each organisation needs to identify how these elements should be customised to meet their business needs as one size does not fit all.

Development of the Victorian Public Sector Workforce Planning Model was based on key work and reports completed by Australian public sector jurisdictions: the Western Australian Workforce Planning Project, the Victorian Auditor General's Report on Workforce Planning and the Commonwealth Auditor General's Report on Workforce Planning, as well as better practice in the private sector.



2.2 the key elements of the model

element 1 workforce analysis

Workforce analysis involves establishing a clear understanding of the organisation's direction, its strengths and weaknesses, and the internal and external factors that influence current and future labour demand and supply. Specific activities undertaken in workforce analysis include:

- Reviewing organisation direction and the external environment; and
- Analysing internal and external labour forces.

element 2 forecast future needs

Forecasting future needs involves identifying changes to the service delivery requirements of the organisation. Likely changes in the capability and capacity of the future workforce need to be determined. Specific activities undertaken in forecasting include:

- Understanding future work requirements;
- Identifying future competencies;
- Developing forecasting models; and
- Developing forecasting assumptions and scenario building.

element 3 analyse gaps

Analysing gaps involves using the results of workforce analysis and forecasting to identify current and future gaps between the demand for services and the supply of labour to meet those demands. A key element of the gap analysis is the assessment of the characteristics, capacity and capability of the workforce. Specific activities undertaken in gap analysis include:

- Identifying and analysing gaps;
- Prioritisation of work; and
- Identifying potential directions for action.

element 4 develop strategies

Developing strategies involves the planning and design of specific programs and projects that will enable the organisation to develop and maintain a workforce capable of delivering upon the organisation's objectives. Specific activities undertaken in strategy development include:

- Strategy formulation;
- Establishing the case for change; and
- Establishing success criteria.

element 5 implement strategies

Implementing strategies is the execution of the specific programs and projects required to develop and maintain the capability and capacity of the workforce. The implementation of these strategies is integrated into the broader business planning and operational management activities of the organisation. Specific activities undertaken to implement strategies include:

- Execution of strategies;
- Developing a change management strategy; and
- Aligning workforce planning strategies with organisational values and culture.



element 6 monitor and evaluate

Monitoring and evaluation is conducted to determine the effectiveness, efficiency and appropriateness of the workforce planning strategies and activities. Performance information is required to determine the impact of workforce planning on the overall achievement of the organisation's objectives. Specific activities undertaken include:

- Monitoring; and
- Evaluation.

2.3 the critical issue of scope

Before starting any strategic workforce planning effort, the organisation needs to determine the scope of their workforce plan. This involves identifying which jobs or areas of the workforce will be analysed.

The workforce plan can cover the entire workforce or be more limited in scope and focus on:

- Mission-critical occupations, key employees/roles or branches;
- Occupations and skills that are difficult to recruit or retain; or
- A particular strategy to ensure that the right people are available to get particular work done.

Determining the key issues for the organisation in relation to its workforce can also dictate the scope of workforce planning efforts implemented. When the key issue is one of cost containment or staff monitoring then the scope of the workforce plan should be broad. Where the issue is one of risk, the organisation then needs to define the critical workforce groups or areas that pose the greatest potential risk. As a result of the challenges facing the Victorian public sector, departments and agencies are increasingly being forced to use a risk management model to define the critical workforce segments for the achievement of their business goals.

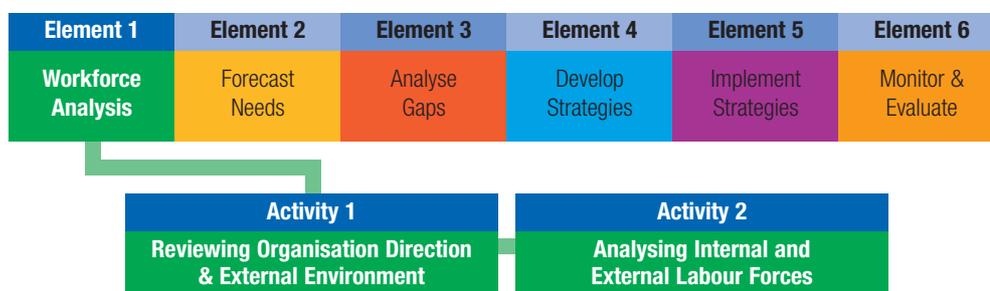
key questions to determine scope include:



- Will it be difficult to replace some of the people who are likely to retire soon?
- Do these people have significant relationships with key stakeholders?
- Are they critical to the development or maintenance of intellectual capital?
- Do they represent a major, important component of the corporate culture?
- Are their skills transferable?

The remaining sections of this Guide will describe each element of the workforce planning model.

3 workforce analysis



The aim of Workforce Analysis is to develop a good understanding of the key drivers that will affect the future supply and demand for labour for the organisation. This involves scanning the internal and external environments to identify factors that may impact on the workforce.

What activities are undertaken?

Analysing the organisation's demand for and supply of labour involves the following activities:

- Reviewing the organisation's future direction;
- Reviewing environmental factors that may impact on the organisation and the workforce;
- Analysing internal workforce characteristics and profiles; and
- Analysing external workforce characteristics and profiles.

3.1 reviewing organisation direction and external environment

The first activity involves the analysis of the business model/organisational plans in order to understand the internal and external factors that will influence the organisation's future needs (or demand) for labour.

When reviewing the organisation's direction, the aim is to develop a good understanding of the future mission, vision, business plans and goals of the organisation, and the implications this may have on the workforce. Valuable information can be obtained through facilitated workshops or interviews with senior leaders and/or line managers.

Understanding the organisation's direction will allow an organisation to identify:

- Key workforce segments critical to achieving the organisation's strategy and mission;
- The behaviours and skill characteristics required by these workforce segments;
- Assumptions about future demand for services; and
- The key segments of the workforce that would be the most costly to lose.

The external environment needs to be scanned to identify any factors and trends that may impact on the organisation's direction and its workforce.



The environmental scan looks at trends and external forces across a range of factors. Tools used to conduct an environmental scan include:

STEEP analysis – consideration of demographic, social/cultural, technological, environmental, economic and political/legal factors; and

SWOT analysis - a review and analysis of the organisation’s internal and external strengths, weaknesses, opportunities and threats.

Inputs to analysing future workforce needs can include:

analysing organisation direction	
Mission, vision and value statements	Balanced scorecards
Strategic business plans	Work practices and workflows
Budget forecasts	Plans for new projects and technology
Annual reports	External and internal service agreements and contracts

conducting an environmental scan - general information	
Demand for and supply of workers in key occupational fields	Educational institutions’ enrolments and specialities
Emerging occupations and competencies	Client or customer survey information
Net migration patterns	Technology shifts
Retirement and ageing workforce trends	Work hours and employment type
Workforce participation trends	Desirability of key geographic areas
Interest and inflation rates	Unemployment rates

scanning policies and frameworks	examples
Federal and State government laws and policies affecting the workforce	EEO, OH&S, Workchoices, Public Administration Act 2004
Victorian government policies and strategies outlining future economic, social and environmental directions and visions for Victoria.	Growing Victoria Together 2001; Melbourne 2030; Our Environment Our Future 2005; A Fairer Victoria 2005; Our Water Our Future 2004

The identified factors and their impact on the organisation and the workforce can then be considered and addressed within the workforce plan and human resources interventions.



key questions to explore when reviewing organisation direction and external environment include:

- Where is the organisation going in the next three to five years?
- What are the workload drivers for the organisation?
- Will projects or projected services/directions impact on the business?
- What are the organisation's current and future business, work functions and activities?
- What are the required workforce composition and competencies?
- What are the anticipated changes over the planning period?
- What does the current and future labour market look like (regarding the availability of certain occupations and the people necessary to fill them)?
- How is technology expected to change and how will these changes influence the type and number of jobs available and the skills and education needed for these jobs?
- What is the impact of current or future government regulations (such as affirmative action and equal employment opportunity)?
- How is the economy performing both locally and nationally?
- What are the sources of competition for attracting people (salary, benefit packages, etc)?
- What other trends may impact the organisation (such as trends towards decentralization, outsourcing or restructuring)?

3.2 analysing internal and external labour forces

The next activity involves the analysis of the internal and external labour markets, in order to understand the factors that will influence the supply of future labour for the organisation.

Analysing the internal and external labour force will enable an organisation to identify:

- The composition, characteristics and supply of current labour for the organisation (from internal and external sources); and
- The type of jobs and skills available internally and externally.

Analysing the organisation's internal labour supply, involves the identification of the characteristics, composition, competencies and workload of the current and future available workforce. The analysis of the internal workforce also needs to consider the organisation's reliance on the contingent workforce, which includes consultants, contractors, agency staff, temporaries and casuals.

Internal workforce information can be collected through a range of quantitative and qualitative methods that include:

- Competency assessments – surveys of managers and employees;
- Workload data – line managers complete reporting templates with instructions and formulas on how to calculate workload; and
- Workforce data – personnel records and human resource systems.



Analysing the external workforce and labour market data enables an organisation to understand the potential future and current labour supply issues and conditions, and to build these into workforce planning strategies.

Monitoring external labour market changes ensures that:

- Sufficient numbers of replacement staff are available to cover separation and growth;
- The contingent workforce relied upon by the organisation is maintained at adequate levels; and
- Intelligence is gathered to contribute to the decision of whether the organisation “builds or buys” specific workforce skills and numbers required.

Inputs to analysing the internal and external workforce can include:

internal workforce	
Demographic data	Trend data (for a historical picture)
Number of employees, FTE and headcount	Resignation/separation/turnover rates
Job classification/occupation	Retirement patterns/rates
Salary level	Voluntary separation rates
Age distribution	Leave patterns (sick leave, long service, family/parental leave)
Gender breakdown	Recruitment and vacancies patterns
Nationality and diversity characteristics	Promotion and transfer patterns (ie. mobility within agency)
Education level/qualifications	Other data relevant to organisation (eg. rate of female participation, % external hires)
Employment status (eg. ongoing, fixed-term contract)	Skills gaps
Employment type (full-time, part-time, casual)	Tenure (indication of level of experience and how old skill set is in the area)
Length of service	
Competency levels	
Training	

external labour market workforce	
Information	Websites
Australian Bureau of Statistics Census and Labour force data	www.abs.gov.au
Department of Employment and Workplace Relations	www.dewr.gov.au
Department of Education, Science and Technology	www.dest.gov.au
Relevant peak industry, professional and training bodies	Government Skills Australia: www.governmentskills.com.au , TAFE bodies: www.dest.gov.au/sectors/training_skills
Student Information (TAFE, Universities etc)	eg. www.unimelb.edu.au , www.rmit.edu.au



key questions to explore when analysing the internal and external workforce include:

- What are the competencies, attributes and composition of the current workforce?
- What is the current workload?
- What are current and projected retirements, turnover, secondments, etc?
- What is the current year labour budget?
- What current skills are essential to the business?
- What is the demand for and availability of these skills in the external labour market?
- What occupational groups or skills does the organisation currently obtain via contracts or casual employment?
- What percentage of employees are on contracts or casual employment?
- What are the key characteristics/skills/profile of employees on contracts and casuals?
- What work is completed by contingent workforce (areas used, and reasons why)?
- What is the labour market like (re: availability of qualified candidates, ability to recruit these candidates, and organisational challenges (ie. internal constraints) in recruiting competitively)?
- What are the trends in external benchmarking data (re: rates of pay, skill availability)?
- What are the trends in external environmental data (ie. inflation, competition, unemployment)?

3.3 what does better practice look like?

reviewing organisation direction and external environment



Better practice guidelines	What it looks like
Workforce planning is integrated into organisational planning processes	<p>Workforce planning is a core step in the organisation's business planning cycle and processes, and is revisited each time the business plans are reviewed</p> <p>Workforce planning outcomes are linked to the overall corporate objectives</p> <p>Workforce planning is a high priority within the organisation</p> <p>Accountability for workforce planning outcomes and processes are clearly articulated and understood within the organisation</p>
Senior management reinforce the importance of strategic workforce planning	<p>Senior management are actively involved in all stages of the workforce plan from the development through to the implementation and evaluation</p> <p>Senior executives or special committees oversee the implementation of workforce planning initiatives within the organisation</p> <p>Senior executives receive regular reports on workforce issues and track workforce planning initiatives against targets and performance indicators</p> <p>Senior and line managers are clear on their responsibilities and accountabilities for workforce planning and the link to business planning</p>
The objectives and actions of the workforce plan are widely communicated and understood	<p>A communication plan has been developed and implemented to inform all stakeholders of the workforce plan (its aims, initiatives and timeframes) and how it will impact on the workforce</p> <p>All employees within the organisation understand the overall workforce planning goals</p>



analysing internal labour force	
Better practice guidelines	What it looks like
Reliable and timely data is collected on the internal workforce	Investment in human resource information systems enables better analysis and reporting of workforce information
Key demographic data has been captured to develop a profile of the current workforce	Key demographic data is tracked and used to analyse trends Staff climate and satisfaction surveys, including staff retirement intention surveys are conducted within the organisation with results and analysis fed directly into workforce planning efforts and strategies
The organisation has identified critical roles and associated capabilities that are essential for delivering future business outcomes	Capability frameworks are developed for key roles Processes are established for staff assessments of skill bases and readiness for future roles Systems have been developed to capture the capability levels of employees within organisation
The organisation has identified relevant benchmarks and uses them to identify trends	Collection, analysis and reporting of patterns in employee retention, resignation and retirement is undertaken Reporting of the return on investment of learning and development and HR strategies is understood and conducted
The organisation regularly reports on the characteristics of the internal workforce including trends and benchmarks	Targets and performance indicators are used to guide strategic decision-making Exit interviews are conducted and results fed into retention and recruitment strategies

analysing external labour force	
Better practice guidelines	What it looks like
Data relating to the external workforce is collected from a range of sources	Available data sources (such as the ABS Census and labour force data) are incorporated into workforce planning
The external labour market and community demographic profiles have been assessed	Demographic projections and labour supply data are analysed and incorporated into workforce planning Collection and analysis of information around skill formation and professional registration (where relevant) is used to assist supply projections in workforce planning
Indicators of better practice are identified and considered	Ongoing relationships are established with external bodies, such as peak industry bodies and universities, to track supply and improve alignment of required future organisational skills within specific professions/qualifications
The organisation collects information relating to the state of its contingent workforce and analyses trends and competitive forces	Human resource information systems capture data and track trends in relation to contingent labour usage within the organisation (alongside internal labour force data)

3.4 quick check - where is the organisation?



1. WORKFORCE ANALYSIS			
1.1 ORGANISATION DIRECTION AND ENVIRONMENT			
1.1.1 Workforce Planning is integrated into organisation planning processes.			
	Standard	Intermediate	Complex
1. To what extent do organisation plans address workforce issues?	<input type="checkbox"/> Workforce planning is considered only as part of the implementation of major change initiatives.	<input type="checkbox"/> Strategic workforce planning is part of the business planning process.	<input type="checkbox"/> Strategic workforce planning is viewed as an integral and critical part of the business planning process by Executive, management, staff and HR.
(i) Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii) Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
2. To what extent is analysis conducted on the impact of social, technological, environmental and political (STEP) factors on the demand for labour?	<input type="checkbox"/> Limited external scanning undertaken.	<input type="checkbox"/> SWOT analysis undertaken in relation to the workforce annually by Division or work unit.	<input type="checkbox"/> Comprehensive analysis of the STEP factors undertaken on an annual basis for key job families and job functions.
(i) Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii) Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
3. To what extent is there a feedback loop between planning and workforce planning issues	<input type="checkbox"/> Workforce planning is conducted after business planning and is not used to inform business planning.	<input type="checkbox"/> Workforce planning and business planning are linked and included in the same documentation.	<input type="checkbox"/> Close integration between workforce planning and business planning to allow feedback both ways - resources are co-located.
(i) Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii) Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
1.1.2 Senior Management reinforces the importance of strategic workforce planning.			
	Standard	Intermediate	Complex
4. Is there support for workforce planning from senior leaders within the organisation?	<input type="checkbox"/> Support for workforce planning is primarily championed by HR professionals within the organisation.	<input type="checkbox"/> Executive, line managers and HR are involved in and understand the link between workforce and business planning.	<input type="checkbox"/> Executive, line managers and HR are committed to and accountable for workforce and business planning processes and outcomes.
(i) Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii) Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
	Standard	Intermediate	Complex
5. Have the critical organisational capabilities been defined by the Senior Management Team?	<input type="checkbox"/> Critical Organisational capabilities are not clearly defined.	<input type="checkbox"/> One or two critical organisational capabilities are identified and reflected in the business plan.	<input type="checkbox"/> All critical organisational capabilities are identified and a systematic approach to development is reflected in the business plan.
(i) Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii) Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →

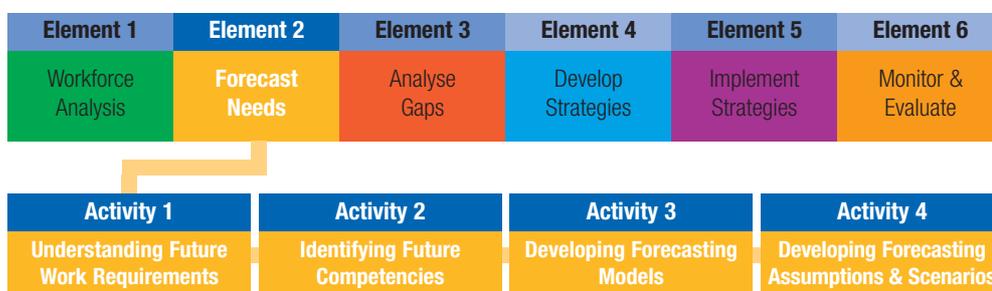


1.1.3 The objectives and actions of the workforce plan are widely communicated and understood.		Standard	Intermediate	Complex
6.	Is the purpose of the business, its strategic directions and workforce implications widely communicated and understood?	<input type="checkbox"/> Business planning is cascaded throughout all levels of the organisation.	<input type="checkbox"/> The organisation's business plan, strategic directions and the workforce implications are communicated and understood by all levels of the organisation.	<input type="checkbox"/> Long term directions and implications for workforce management are widely distributed and understood throughout the organisation. <input type="checkbox"/> The organisation has inspiring, committed and thoughtful leaders who continually refine and communicate its purpose and directions.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
1.2 INTERNAL WORKFORCE				
1.2.1 The organisation collects reliable and timely data on its internal workforce.		Standard	Intermediate	Complex
7.	Has key demographic data been captured to develop a profile of the current workforce?	<input type="checkbox"/> A range of workforce data is collected and monitored in management reports.	<input type="checkbox"/> The current workforce is analysed on a range of qualitative and quantitative measures that include: capability, size, mix and flexibility.	<input type="checkbox"/> Regular management reports monitor and analyse workforce planning trends and profiles, including contingent staff.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
1.2.2 Data Analysis.		Standard	Intermediate	Complex
8.	Has the organisation identified critical roles and associated capabilities that are essential to delivering future business outcomes?	<input type="checkbox"/> Current mission critical roles and capabilities have been identified.	<input type="checkbox"/> Processes for identifying talent and developing capability for mission critical roles and capabilities exist.	<input type="checkbox"/> Workforce planning for mission critical roles and organisational capabilities are integrated with relevant HR functions, processes and organisational strategies.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
1.2.3 Use of Benchmarks.		Standard	Intermediate	Complex
9.	Has the organisation identified relevant benchmarks and used these to identify trends?	<input type="checkbox"/> Internal benchmarks have been identified to measure workforce trends.	<input type="checkbox"/> The organisation has developed an array of internal and external benchmarks.	<input type="checkbox"/> A sophisticated array of workforce benchmarks has been identified, used to monitor trends and is reviewed for relevance annually.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →

1.2.4 Reporting.		Standard	Intermediate	Complex
10.	Does the organisation regularly report on the characteristics of the internal workforce including trends and benchmarking?	<input type="checkbox"/> Monthly or quarterly reports to senior management on workforce characteristics. Key trends are identified and internal benchmarks used.	<input type="checkbox"/> Monthly and quarterly reports are provided to all managers on the key characteristics of the workforce, mainly demographic and education, annual trends shown and a range of benchmarks used.	<input type="checkbox"/> Reports on internal workforce characteristics are comprehensive, readily available to senior management, line managers and staff. Data includes capabilities, education and demographic information. Five year trends are identified and a range of internal and external benchmarks used.
(i)	Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3 EXTERNAL WORKFORCE		Standard	Intermediate	Complex
1.3.1 Data Collection.		Standard	Intermediate	Complex
11.	Is data relating to the external workforce collected from a range of sources?	<input type="checkbox"/> Knowledge of external labour market is based on current experience of hard to recruit roles. <input type="checkbox"/> External environment factors have been identified and their impact assessed.	<input type="checkbox"/> Labour market and industry sector trends, and skills shortages are analysed and assessed for their impact on the business and its workforce.	<input type="checkbox"/> A planned and strategic approach is taken to scanning external data relevant to all aspects of the business. Data analysed includes: labour market and industry sector trends, skills shortages and community demographics.
(i)	Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.2 Data Analysis.		Standard	Intermediate	Complex
12.	Have the external labour market and community demographic profiles been assessed?	<input type="checkbox"/> Detailed analysis is undertaken of the external labour market.	<input type="checkbox"/> Management and Executive are aware of external factors and trends that can potentially impact the business and workforce.	<input type="checkbox"/> There is a commitment to organisation-wide dialogue about significant issues and trends and their impact on the organisation and mission critical roles.
(i)	Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.3 Indicators of Better practice.		Standard	Intermediate	Complex
13.	Are indicators of better practice identified and considered?	<input type="checkbox"/> Limited review of external workforce practices.	<input type="checkbox"/> Identify better practice in attracting and retaining external workforce and develop strategies.	<input type="checkbox"/> Is recognised as a better practice organisation and regularly identify new industry and global trends.
(i)	Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.4 Contingent workforce reliance is understood.		Standard	Intermediate	Complex
14.	Does the organisation collect information relating to the state of its contingent workforce and analyse trends and competitive forces?	<input type="checkbox"/> Collects information on use of casuals, fixed term staff (<1 year), high level records relating to recruitment agencies and records of contractors.	<input type="checkbox"/> Information collected on casuals, fixed term staff (<1 year), recruitment agency staff and contractors can be broken down by work unit. Line manager understands the recruitment agency environment.	<input type="checkbox"/> Collects information on casuals, agency employed staff and contractors including hours, cost, job function and skills. Has a good understanding of the workforce pressures on contingent workforce suppliers. Includes this analysis in workforce plan.
(i)	Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii)	Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



4 forecast needs



The key aim of this element is to identify the workforce that will be needed to accomplish the organisation's future mission and work requirements.

This information is then documented to develop a Future Workforce Profile.

What activities are undertaken?

The activities to complete when forecasting future organisational needs include:

- Understanding the future work requirements of the organisation;
- Identifying future competencies;
- Developing forecasting models; and
- Developing and articulating forecasting assumptions and scenarios.

4.1 understanding future work requirements

Forecasting future work requirements involves identifying the type of work that will need to be performed to meet future organisational goals, as well as how it will be performed.

Inputs to identifying future work requirements for the organisation include:

- Organisational business plans and vision; and
- Current workforce profile (including competency levels, composition and numbers).

Techniques for forecasting future workforce needs include:

techniques	description	when to use
Focus Group	Small group facilitated discussion enables anecdotal evidence to be obtained	Highly specialised fields, to gain information quickly
Survey	Employee surveys of intentions can help predict likely outcomes and identify impending changes	Best conducted on a regular basis to obtain trends, high reliability
Delphi technique	Draws together subject matter experts and engages them in assessing likely impacts and their assessments of future directions and trends	Specialised area, to obtain senior input
Force field analysis	Small group brainstorm force field analysis to identify forces that promote and resist change	Significant external barriers present
Scenario planning	Narrative statements of possible futures for the organisation	Lack of clarity and ambiguity of future



key questions to explore when understanding future work requirements include:

- What type of work will be done in the future?
- How will this new work be performed?
- How does this work differ from current work requirements?
- What work/job roles/positions will be critical to the organisation in the future?
- How will jobs and workload change as a result of future technological advancements, economic, social and political conditions?
- How will the organisation need to be structured to support future work requirements?
- How will divisions, work units, and jobs be designed?
- How will work flow into each part of the organisation? What will be done with it? What will be the reporting relationships?
- What attributes of the current workforce need to change for the future?
- What are the future work and organisational business requirements?

4.2 identifying future competencies

Having identified the future work that needs to be done, the next activity is to identify what competencies employees will need to carry out the work.

Competencies can be defined organisationally or on an individual basis. Identifying competencies on an organisational basis provides a means of pinpointing the most critical for organisational success.

The set of competencies that describes the ideal workforce of the future are then captured within the Future Workforce Profile.

This set of competencies provides management and staff with a common understanding of the skills and behaviours that are important to the organisation. They become a critical piece of information for Human Resource processes like recruitment, employee development and performance management.



key questions to explore when identifying future competencies include:

- What new skills are needed for future business and work requirements?
- What are the critical core organisational competencies that will be required to support the organisation's future vision and culture?
- What new knowledge, skills and abilities do specific positions/job groups/work areas need to perform in the future?
- What are the key differences in the current and future workforce competencies?



4.3 developing forecasting models

Forecasting models can be used to assist with identifying future workforce needs. The decision to use forecasting models within a workforce planning exercise depends on the level of complexity, accuracy and scope required.

Forecasting Models use mathematical and statistical techniques to simulate different organisational scenarios. The models allow the exploration of the relationship between different human resource issues and how variations in one component will have an effect on the workforce under review.

Forecasting model	Description
Equilibrium Modelling	Looks at actual numbers and assumes that over time no change will occur within the system. The benefit of this approach is that it provides baseline data from which changes can be assessed
Network Flows Mapping	Attempts to predict employment outcomes such as retirement, lateral movement, promotion etc, based upon their links with other employee characteristics such as salary, skill, age, sex, etc. These movements are expressed as probabilities and enable a “what if” type of analysis to be undertaken
Change Forecasting	Attempts to forecast employee flows by looking at past practices. This information is used to project the future availability of employees whilst making allowances for potential organisation change. The statistical methods employed are predominantly probability and regression analysis
Optimisation Models	Attempt to identify an “ideal” position or set of future goals using complex statistical techniques such as linear and goal programming. They rely heavily on the integration of workforce planning with strategic or corporate planning

4.4 developing forecasting assumptions and scenario building

In order to make forecasting more realistic, a range of assumptions concerning the future can be developed and incorporated into different scenarios. Each scenario depicts a different future state and helps the organisation predict and envision future changes and what impact they will have on the workforce.

Depending upon the size and complexity of the scenario, they can be used to propose possible intervention strategies such as policy changes or increases/decreases in staffing levels and finances.



key questions to consider when developing scenarios include:

- What are the most critical assumptions to use for developing scenarios? (in terms of the organisation’s business directions and risks)
- What are the different potential pictures of what the organisation could look like?
- Which scenarios should be used? (in terms of realism, relevance, challenging the status quo and risk management for the organisation)

4.5 what does better practice look like?



understanding work requirements

Better practice guidelines	What it looks like
The organisation identifies work to continue and new work to be undertaken	As part of the Business planning cycle, strategic workforce plans and change management plans are developed that outline changes to the organisation and work required over the short and long term
Assessment of over and understaffing is undertaken	Technology systems exist within the organisation that use external benchmarking data, internal workforce trend and productivity data to assess staffing levels, and this exercise is linked to the business planning cycle
The organisation assesses employee skill gaps	Systematic assessment of employee skill gaps through existing HR processes such as performance management and learning and development programs, as well as through targeted skills assessment exercises
Job design options are considered to reduce impact on staffing	Organisational restructuring and job redesign options (like flexible work, resource sharing, restructure of base qualifications) are analysed to help the organisation meet its future business and workforce requirements
Use of technology is investigated to improve efficiency and effectiveness	Business processes are systematically mapped and reviewed, and technology solutions explored and implemented to reduce repetitive work and improve productivity and service levels

developing forecasting models

Better practice guidelines	What it looks like
Forecasting methods are used	Trends in internal workforce data, and external labour market and demographic data are used and projected into the future to aid forecasting within the organisation
Forecasting approaches are appropriate to the environment	Forecasting models and approaches are developed using relevant internal data and external labour market and demographic trends, and customised to meet the specific needs of the organisation

developing forecasting assumptions and scenarios

Better practice guidelines	What it looks like
Forecasting assumptions are developed and articulated	Forecasting models using forecasting assumptions are developed and incorporated within workforce planning processes. Organisations have processes (like sensitivity analysis) in place to test the reality of the model and allow for contingency planning
Scenario building is used to prepare for a range of possible futures	Scenario planning is part of the business planning cycle and workforce planning processes and used within the organisation to picture and plan for its future



4.6 quick check - where is the organisation?

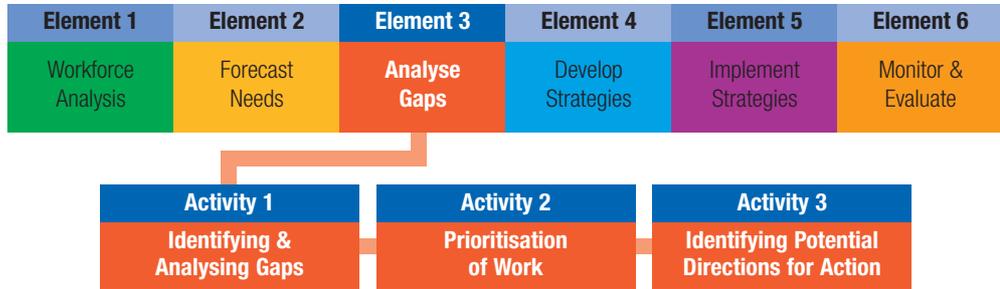


2. FORECAST NEEDS			
2.1 UNDERSTANDING WORK REQUIREMENTS			
2.1.1 Identification of work to continue and new work to be undertaken.			
	Standard	Intermediate	Complex
15. Does the organisation identify not only new work required but work that will cease or be phased out over time?	<input type="checkbox"/> Broad understanding of general impact of direction on occupations and skills.	<input type="checkbox"/> Significant understanding of impact of direction on the nature of work needed.	<input type="checkbox"/> In-depth analysis of amount of extra staff needed and strategies developed about sourcing them.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.2 Assessment of over and understaffing.			
	Standard	Intermediate	Complex
16. Does the organisation identify areas of potential over and understaffing by skill and by occupation?	<input type="checkbox"/> Identification of areas where staff shortages and surpluses presently exist.	<input type="checkbox"/> Identification of numbers and skills in shortage and or surplus and analysis of potential for redeployment/ redundancy options.	<input type="checkbox"/> Benchmarking has occurred involving comparable organisations with an assessment made of the nature of the gap between such organisations and the agency.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.3 Assessment of Employee Skill Gaps.			
	Standard	Intermediate	Complex
17. Does the organisation assess at a range of levels the employee skill gaps for achievement of future directions?	<input type="checkbox"/> Analysis of the broad characteristics of the workforce is undertaken (eg. total numbers, gender) and matched to future requirements over the next one to two years.	<input type="checkbox"/> Characteristics of critical roles required to meet future business needs have been identified.	<input type="checkbox"/> Key organisational capabilities and workforce demographics required to meet future business goals are clearly articulated and understood by all levels of the organisation.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.1.4 Job Design options are considered to optimise use of the workforce and achieve organisational aims.			
	Standard	Intermediate	Complex
18. Does the organisation actively consider job design changes to better utilise the scarce workforce?	<input type="checkbox"/> The organisation has considered options for job design changes to maximise ability to fill organisational gaps.	<input type="checkbox"/> The organisation has identified position that may be the subject of job design and analysed the impact of that in addressing potential skill gaps.	<input type="checkbox"/> Having identified positions for job redesign, the organisation has conducted risk assessments of proposed changes, change management and implementation plans.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.1.5 Use of Technology is considered to achieve organisational aims.		Standard	Intermediate	Complex
19.	Does the organisation investigate implementation of technology to meet future capacity requirements?	<input type="checkbox"/> The organisation has considered options for technology changes to maximise ability to fill organisational gaps.	<input type="checkbox"/> The organisation has identified positions that may be the subject of change resulting from technology changes and analysed the impact of that in addressing potential skill gaps.	<input type="checkbox"/> Having identified positions for technology changes, the organisation has conducted risk assessments of proposed changes, change management and implementation plans.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
2.2 FORECASTING MODELS		Standard	Intermediate	Complex
2.2.1 Forecasting Methods.		Standard	Intermediate	Complex
20.	Does the organisation consider a range of forecasting methods including: interviews, anecdotal, focus groups, statistical analysis according to requirements?	<input type="checkbox"/> Focus groups or other similar interview technique is used involving HR and/or line staff with organisational knowledge is used to assess forecasting issues.	<input type="checkbox"/> Focus group work and the analysis of extrapolations of trend data from demographic data sets are used to assess forecasting issues.	<input type="checkbox"/> Structured, systematic projection analysis is used to understand forecasting issues.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
2.2.2 Forecasting approaches are appropriate to the environment.		Standard	Intermediate	Complex
21.	Does the organisation consider the use of a range of forecasting approaches including: equilibrium approach, network flows, change forecasting and optimisation?	<input type="checkbox"/> Equilibrium modelling/network flows.	<input type="checkbox"/> Change forecasting.	<input type="checkbox"/> Optimisation models.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
2.3 FORECASTING ASSUMPTIONS AND SCENARIOS		Standard	Intermediate	Complex
2.3.1 Forecasting assumptions are developed and articulated.		Standard	Intermediate	Complex
22.	Has the organisation clearly articulated its forecasting assumptions and tested them for reasonableness?	<input type="checkbox"/> General SWOT analysis with different assumptions testing most likely dimensions of change.	<input type="checkbox"/> Detailed SWOT analysis in relation to mission critical positions with different assumption testing.	<input type="checkbox"/> Sensitivity analysis of assumptions based on most recent experience and known future trends.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
2.3.2 Scenario building is used to prepare for a range of possible futures.		Standard	Intermediate	Complex
23.	Does the organisation use scenario building as a forecasting tool and assess the likelihood of a range of alternate scenarios?	<input type="checkbox"/> Scenario planning into the next two to three years has been undertaken to inform business planning and predict workforce needs.	<input type="checkbox"/> Scenario planning into the next two to three years has been undertaken to inform business planning and predict workforce needs.	<input type="checkbox"/> Scenario planning into the next two to three years has been undertaken to inform business planning and predict workforce needs.
(i)	Where is the organisation now?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →
(ii)	Where do you want to be in 2 years time?	← <input type="checkbox"/> →	← <input type="checkbox"/> →	← <input type="checkbox"/> →



5 analyse gaps



Having identified the future workforce required and analysed the current workforce, the next element involves analysing the gap between the two.

What activities are undertaken?

Gap analysis involves the following three activities:

- Identification and analysis of gaps (ie. differences between supply and demand);
- Prioritisation of areas for action, based on the assessment of risk associated with the gap; and
- Identification of potential directions for action.

5.1 identifying and analysing gaps

Analysis of the current versus the future profile may show one of the following:

A short fall (when projected supply is less than forecasted demand) which indicates a future shortage of needed employees or skills. Effective strategies, such as recruitment, training and succession planning will need to be developed and implemented.

A surplus (when projected supply is greater than forecasted demand) which indicates a future excess in some categories of employees. The surplus may represent occupations or employee skills that will not be needed in the future, or at least not be needed to the same degree. Retraining, transfers or separation incentives are a few examples of strategies to address surplus situations.



the key question to ask when conducting a gap analysis is:

- What gaps in competencies, positions, employees currently exist in the workforce that will need to be reduced or eliminated to achieve the future vision of the organisation?

5.2 prioritisation of work

Having identified the existence and nature of the gaps or surpluses, they need to be prioritised according to those that are most critical to the organisation and the delivery of future goals. Separating operational short-term and strategic long-term issues is helpful in determining priorities.

Completing a risk assessment of the gaps enables an organisation to identify strategic high risk areas. This means that all significant risk factors that could prevent the successful achievement of the organisation's objectives and performance targets are well understood and managed.



key questions to consider when prioritising the work include:

- Which are the most critical gaps for the organisation, in terms of achievement of future business requirements?
- Which gaps are related to operational short-term issues?
- Which gaps are related to strategic long-term issues?
- What are the risks associated with each gap?
- What would happen if the gaps are not addressed? How likely is it to happen?
- Which risks are acceptable to the organisation and which ones are unacceptable?

5.3 identifying potential directions for action

The next activity involves the identification of potential actions to address the prioritised gaps. Short and long-term actions across HR and organisational processes need to be considered, and linked to business plans.

Understanding the reason for the gap will assist with identifying potential directions for action. Assessing whether it is due to a skill gap (currently non-existing skills), skill surplus, or attraction and retention issues, will help identify the most appropriate actions to implement.



key questions to consider when assessing the reason for the gap include:

- Does the agency's workforce currently have the anticipated future skills?
- Is the number of employees with the critical skills adequate?
- Are critical skills available in other positions within the organisation?
- Are there feeder positions for these critical skills?
- What job functions or skills will no longer be required?



5.4 what does better practice look like?

identifying and analysing gaps



Better practice guidelines

The gap between future workforce needs and the profile of the current workforce is identified and analysed

What it looks like

Detailed studies/projects have been completed to understand the specific labour force supply or demand issue facing the organisation now and into the future

The findings of these are built into workforce planning strategies

prioritisation of work

Better practice guidelines

The gaps are prioritised according to a developed risk profile

What it looks like

A risk assessment is conducted to identify and prioritise the risks associated with each gap

Risk mitigation strategies are developed, implemented and monitored

identifying potential directions for action

Better practice guidelines

Options for addressing identified gaps are scoped and assessed

What it looks like

Detailed plans exist linking gaps with critical human resource and management processes and strategies are considered and analysed

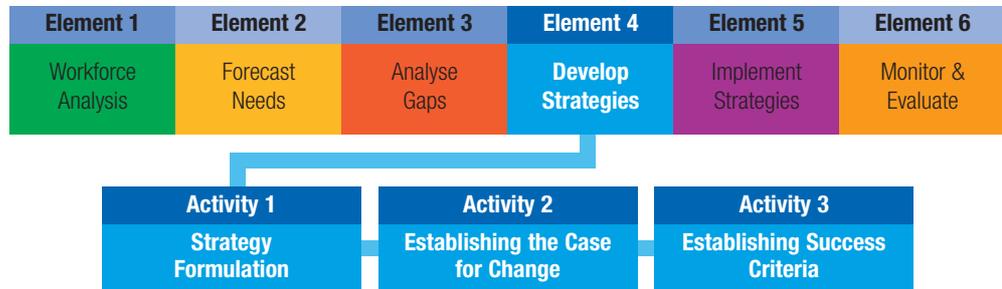
5.5 quick check - where is the organisation?



3. ANALYSE GAPS			
3.1 IDENTIFICATION AND ANALYSIS OF GAPS			
3.1.1 The gap between future workforce needs and the profile of the current workforce has been identified and analysed.			
	Standard	Intermediate	Complex
24. Has the organisation assessed the potential gap between the current workforce profile and capabilities, and future workforce needs?	<input type="checkbox"/> An assessment of capability for mission critical roles has been completed and compared to predicted future workforce needs at a high level.	<input type="checkbox"/> The gap between current workforce demographics, trends and capabilities and future workforce demographics and capabilities have been analysed.	<input type="checkbox"/> An assessment of the gap between the capabilities and demographics of the current and future workforce (including mission critical roles) is conducted annually.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2 PRIORITISATION OF WORK			
3.2.1 Prioritisation of gaps according to risk profile.			
	Standard	Intermediate	Complex
25. Has the organisation identified the risks and set priorities for action according to the level of risk?	<input type="checkbox"/> Organisation's risk assessment includes workforce risk assessment.	<input type="checkbox"/> Workforce risk assessment undertaken and key risks identified by business unit.	<input type="checkbox"/> Detailed risk assessment of the workforce against specified consequences and likelihood to ascertain priorities for mitigation action.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3 IDENTIFY POTENTIAL DIRECTIONS FOR ACTION			
3.3.1 Identification of areas of management activity affected by potential strategies.			
	Standard	Intermediate	Complex
26. Have the areas requiring management action to bridge the gap been identified?	<input type="checkbox"/> Individual strategies to address gaps have been identified at a business level.	<input type="checkbox"/> The organisation's business and workforce plans incorporate strategies to address gaps and move the organisation towards its future needs.	<input type="checkbox"/> An assessment of the gap between the capabilities and demographics of the current and future workforce (including mission critical roles) is conducted annually. <input type="checkbox"/> Systems are embedded within HR & organisational processes continually assess gaps between current and future needs and these are linked to business & workforce plans.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



6 develop strategies



Having identified and prioritised the gaps between the current and future workforce profile, the next element of workforce planning involves the development of strategies to address these gaps and surpluses. These strategies need to be linked to the workforce plan and the organisation's business plans.

What activities are undertaken?

Strategy development involves the following activities:

- Strategy formulation;
- Establishing the case for change; and
- Establishing success criteria.

6.1 strategy formulation

Strategies need to be prioritised and linked to business plans. This will ensure that those addressing the most critical gaps are implemented first. A combination of short and long-term strategies are needed to be developed to address the gaps between the current workforce and the future workforce requirements. The strategies and action plans need to specify what is going to be done and when.

Strategies to address workforce planning issues can fall into one of six categories:

- 1 Improving attraction and recruitment strategies;
- 2 Improving labour supply;
- 3 Increasing investment in development;
- 4 Improving employment agility;
- 5 Improving workforce governance and capability; and
- 6 Improving participation, retention and culture.

Potential strategies may include:

1. Improving attraction and recruitment strategies through:	2. Growing the labour supply through:
Employment branding initiatives Better understanding of the organisation “Employer Value Proposition” Improving recruitment and selection methods	Increasing the attractiveness of study for selected courses Skilled migration to fill gaps Increasing community involvement in the provision of services Developing partnerships with other organisations to access a different labour pool
3. Increased investment in development of the existing workforce through:	4. Promoting agility in staffing through:
Understanding the Return on Investment of learning and development interventions Developing an understanding of mission critical skills to direct priority attention Improving the organisation’s capability in succession management Developing a knowledge management approach Creating room for learning	Better management of the contracting workforce Redesigning roles to increase supply from alternative sources Introduce flexible work options
5. Improving participation, retention and culture through:	6. Improving workforce planning governance and capability through:
Removing barriers and disincentives to increased participation Promoting work-life balance and flexible work practices Promoting better health outcomes to ensure maximum participation in the workforce	Improving the connection between strategic and policy direction and workforce planning considerations Improving workforce planning projection and external scanning capability Identifying and promulgating best practice workforce planning



key questions to explore strategy formulation include:

- What are the key things the organisation needs to accomplish and by when?
- Which are the best strategies for the organisation’s business needs, values and culture?
- How can strategies, processes, technology, and management systems be integrated to respond to changing requirements and move the organisation and its workforce into the future?
- How can functional areas such as marketing, finance, operations and human resource management be integrated to attain organisational aims and objectives?
- How can the needs of all key stakeholders be addressed whilst achieving organisational objectives?
- What resource and budget allocations are required?
- How can the current mission be met while simultaneously and proactively planning and preparing for the future?

6.2 establishing the case for change

Establishing the case for change is critical for the success of any planned strategies and changes. It creates the sense of urgency required to get support and co-operation from key stakeholders within the organisation. Senior management need to understand the issues and what needs to be done so that they support and champion workforce planning and change efforts.



The case for change needs to present the current situation, outline the strategic issues and give the rationale for making a change. This may take the form of a problem to resolve or an opportunity to seize. Your argument needs to illustrate how the proposal relates to and will support the organisation's core interests and priorities.

A business case can be developed to support the implementation of the proposed strategies.

The business case needs to address the following issues:

- The issue or problem;
- What needs to be done and why;
- The risks to the organisation if action is not taken;
- An outline of the proposed strategies and actions;
- The options considered and the rationale for choosing the proposed solution;
- The proposal's relationship to other existing policies, processes, programs;
- What the proposed strategies/actions will deliver for the organisation, in terms of benefits and return on investment;
- The associated costs and resource implications for implementing the strategies (in the form of a cost/benefit analysis); and
- An implementation plan and timeframe (including project structure, timelines and reporting, change management, communication plans, evaluation criteria and performance measures).



key questions to explore when establishing the case for change include:

- Why does the organisation need to act on this?
- What will happen if no action is taken?
- Why should the senior management team support this proposal?
- How can a sense of urgency be created?
- What are the benefits and costs to the organisation and the workforce?
- Who within the organisation would be change champions?
- What are the possible objections and arguments against the proposed change?
- What are the potential barriers within the organisation to implementing the change?

6.3 establishing success criteria

Success criteria are objective measures used to assess how well the project's objectives have been achieved (in terms of outputs and educational outcomes), and how well the project itself has run. The success or otherwise of planned actions or strategies implemented can only really be assessed if success and evaluation criteria are set up prior to the implementation.

The evaluation of human resource interventions is an imprecise activity, with inter-related variables impacting on the success or otherwise of strategies/programs, as well as the difficulties with measuring in a pure sense. Whilst projects, by definition have defined

outputs, the outcomes may take time to manifest themselves (eg. as improved performance on assessment tasks, better retention rates, etc). Hence evaluation will need to continue into implementation and beyond.

The success criteria need to be documented within the business case.

Inputs to developing success criteria would include:

- The organisation’s business plan documents, vision and culture statements;
- Business case for the proposed strategies/actions; and
- Assessment of the development of competencies and workforce profile trends.



key questions to consider when establishing success criteria include:

- What do we want to ultimately achieve with these strategies?
- What will success look like overall in the long-term, in the short-term and at critical project/strategy implementation milestones?
- How will we know if we are successful in addressing these gaps/issues? What will change and how? What are the indicators that we are looking for?
- What systems, processes and data currently exist in the organisation that can be used to monitor the success of the strategies and projects?

6.4 what does better practice look like?



strategy formulation	
Better practice guidelines	What does it look like
Integrated business and HR strategies are developed to address the gaps between current and future workforce needs	Integrated recruitment strategies to meet future gaps that include: new branding strategies developed to meet changing job requirements, increased recruitment efforts in areas of shortage, improved recruitment technology to improve recruitment efforts and intelligence Investment and implementation of a range of strategies to develop and retain the existing workforce that include: specific learning programs, industry training release schemes, tertiary studies, skills banks, etc
establishing the case for change	
Better practice guidelines	What does it look like
A business case is prepared demonstrating the case for change including expected return on investment and risk of not taking action	Formal business cases (including cost/benefit analysis) are developed to support the implementation of workforce planning strategies and endorsed by senior executive
establishing success criteria	
Better practice guidelines	What does it look like
Success criteria are established to support evaluation	Success and performance criteria are documented in the business cases and systems are developed to enable evaluation of workforce planning efforts

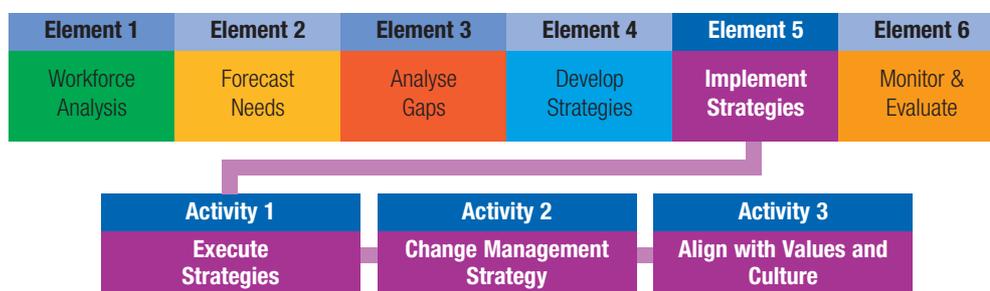


6.5 quick check - where is the organisation?



4. DEVELOP STRATEGIES			
4.1 STRATEGY FORMULATION			
4.1.1 Integrated business and HR strategies have been developed to address the gaps between current and future workforce needs.			
	Standard	Intermediate	Complex
27. Have integrated long and short term strategies been considered across key HR and business processes to address gaps between current and future workforce needs? (ie. recruitment, succession, learning and development, retention, performance management, workplace change, job design, business process reengineering, use of technology, partnering, outsourcing)	<input type="checkbox"/> The organisation has developed a range of strategies that individually address a number of current workforce gaps.	<input type="checkbox"/> The organisation has developed a range of integrated strategies that address a number of current workforce gaps.	<input type="checkbox"/> Integrated short and long-term strategies across HR and business processes, that incorporate capability frameworks, have been developed to address gaps in current and future workforce skills.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2 ESTABLISH THE CASE FOR CHANGE			
4.2.1 Business cases are developed to assess the options and support the case for change.			
	Standard	Intermediate	Complex
28. Does the organisation develop a business case to support the HR and business strategies?	<input type="checkbox"/> Assessment of options undertaken and preferred option identified.	<input type="checkbox"/> Wide range of business and HR strategy options developed and assessed against evaluation criteria.	<input type="checkbox"/> Detailed business case prepared outlining the range of strategies, comparative return on investment, expected benefits, costs, risks, implementation plan and evaluation criteria.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3 ESTABLISHING SUCCESS CRITERIA			
4.3.1 Success criteria are established to support evaluation.			
	Standard	Intermediate	Complex
29. Does the organisation develop success criteria and establish methods for collecting information and measuring the criteria?	<input type="checkbox"/> Success criteria are identified but data is not necessarily captured.	<input type="checkbox"/> Range of success criteria developed and data sources identified in business case to allow measurement.	<input type="checkbox"/> Business case includes success criteria, how this will be measured and has captured the data required for evaluation.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7 implement strategies



The next element of workforce planning involves implementing the strategies and action plan developed to address the organisation's gap in current and future workforce needs.

What activities are undertaken?

Implementing strategies involves the following activities:

- Execution of the strategies;
- Change management to support implementation of strategies; and
- Alignment of strategies to organisational values and culture.

7.1 execution of strategies

When implementing workforce planning strategies the fundamentals of good project management need to be applied:

- Ensure organisational buy-in and support is obtained, as executive level support for the workforce strategies is vital;
- Clarify roles and responsibilities in implementing strategies and actions. This includes identifying who is involved in implementing what, and where co-ordination among different parts of the organisation or with different agencies is needed;
- Develop project plans for the implementation of each workforce strategy. This also involves establishing budget and resource requirements, timelines and milestones for key deliverables and stages;
- Allocate the necessary resources and teams required to implement the workforce strategies;
- Determine performance measures, success indicators and reporting systems; and
- Develop communication plans to inform all employees of the strategies to be implemented: what has been done, why and how it was developed, how and when it will be applied and how it will affect staff.



key questions to explore when implementing strategies include:



- What is the best way to implement the strategies identified in the workforce plan?
- How are the strategies related to and interconnected with each other, and other processes/systems/projects within the organisation?
- What are the key aims and objectives of each strategy? What does the organisation want to achieve in the end?
- How can the strategies and the implementation processes be aligned with the required organisational culture and values?
- What are the likely impacts on the workforce and the organisation? And how can these be managed?
- What are the likely impacts on service delivery, productivity and customers/key stakeholders during the implementation stage? And how can these be managed?

7.2 developing a change management strategy

Workforce planning requires all stakeholders in your organisation to seriously consider change, and understand that the process of change has to be managed and planned. The Change Management Strategy needs to be designed specifically for the unique characteristics of the change itself and the attributes of the organisation.

Implementing change requires:

- The strategic significance of the change to be highlighted – create a sense of urgency;
- A vision for the change to be clearly formulated and articulated – layout the plan;
- Obtaining leadership, management and employee support – create a guiding coalition;
- Communication throughout the organisation to explain what the change will look like for all stakeholders going forward – celebrate short-term wins; and
- Monitoring of the change and impacts on the workforce – keep the momentum going.

key questions to consider when developing a change management strategy include:



- What is the most seamless and effective way to implement the changes?
- What barriers or issues may be present or potentially arise at different stages?
- How could the workforce react? What are their key motivators?
- What is the level of change management skills amongst management?
- What is the ultimate aim of these changes?

7.3 align workforce planning strategies with organisational values and culture

Strategies developed to implement the workforce plan need to reinforce the required future values and culture of the organisation.

Organisational culture is defined as the shared values, norms and expectations that govern the way people approach their work and interact with each other. Culture is what binds a collection of individuals into an integrated entity called an “organisation.”

The desired culture and values should be captured within the organisation’s business plans and reflected in the mission and vision statements. Articulating a direction and desired behaviours/values sets up a sense of the ideal culture the organisation strives to achieve.

Aligning workforce planning with organisational values and culture assists with achieving a number of important workforce planning objectives. A well developed and articulated culture assists:

- Attraction, as it defines the “Employer value proposition” element of the employment brand for the organisation;
- Recruitment, as it guides key selection criteria to maximize the prospect of organisational fit;
- Development, as it guides managers and staff to make better decisions about learning and development interventions; and
- Retention, as it provides a mechanism for continued alignment between organisational and employee values.



key questions to consider when determining organisational culture and values include:

- What cultural attributes and values does the organisation most need to successfully achieve its vision and strategy?
- What support is the organisation providing its managers to create and manage the desired culture?
- How can the required culture and values become part of the organisation?
- Do the strategies and actions support the development of the required culture and values?



7.4 what does better practice look like?



execution of strategies

Better practice guidelines

Investment in initiatives to attract, recruit, develop and retain employees is pivotal and is made to address workforce planning issues

What it looks like

A range of integrated initiatives are implemented across a range of Human Resource areas to address strategic workforce planning objectives. These can include: career change programs, scholarships, targeted training, retraining programs, graduate and targeted skills recruitment programs, employment branding and employee value propositions, assessment centres, etc

change management strategy

Better practice guidelines

Implementation of strategies is supported by a change management approach

What it looks like

Detailed change management plans are developed to support the implementation of workforce planning efforts

Formal systems (like the Australian Business Excellence Framework, ISO) are used to support the implementation of changes within the organisation

align with values and culture

Better practice guidelines

Strategies are aligned with the required organisational values and culture

What it looks like

The desired values and culture are clearly articulated and embedded into all workforce planning and human resource strategies

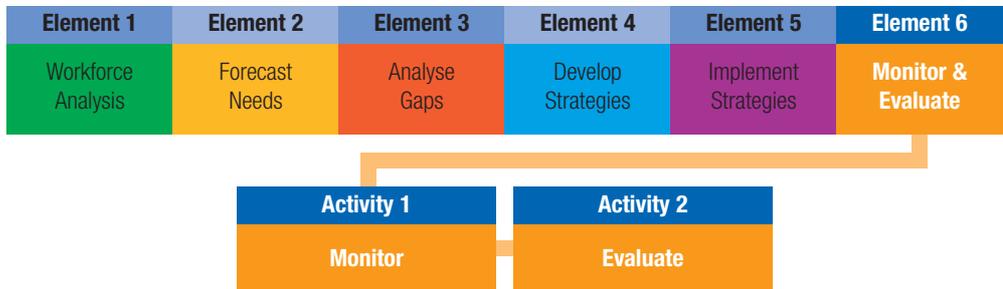
7.5 quick check - where is the organisation?



5. IMPLEMENT STRATEGIES			
5.1 EXECUTION			
5.1.1 Investment in initiatives to attract, recruit, develop and retain employees is pivotal and is made to address workforce planning issues.			
	Standard	Intermediate	Complex
30. Have the proposed strategies been aligned with the longer term business plan, prioritised, and budget and resources allocated?	<input type="checkbox"/> There is a commitment by management to investing in aspects of workforce sustainability (ie. attraction, retention, development and realignment). <input type="checkbox"/> Full resource implications are not recognised.	<input type="checkbox"/> There is a clear and demonstrated long-term commitment by management to investing in all aspects of workforce sustainability (ie. attraction, retention, development and realignment). <input type="checkbox"/> Full resource implications are recognised.	<input type="checkbox"/> Executives and managers, view strategic workforce planning as equally important as other business drivers, such as product or service quality and meeting budgets. <input type="checkbox"/> Funding the "people" aspects of the business is seen as an investment rather than a cost.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.2 CHANGE MANAGEMENT			
5.2.1 Implementation of strategies is supported by a change management approach.			
	Standard	Intermediate	Complex
31. Is a change management approach applied to actively manage the implementation of workforce strategies at strategic, procedural and operational levels?	<input type="checkbox"/> Implementation plans are developed for each workforce strategy.	<input type="checkbox"/> A change management methodology is applied that integrates all the workforce planning strategies.	<input type="checkbox"/> Critical change issues are given attention at the highest level within the organisation. <input type="checkbox"/> The chief executive officer is highly visible in influencing cultural change in symbolic and meaningful ways.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.3 ALIGNMENT WITH VALUES			
5.3.1 Strategies are aligned with the required organisational values and culture.			
	Standard	Intermediate	Complex
32. Are required organisational values and culture modelled and embedded into new practices and systems?	<input type="checkbox"/> The organisation's business systems and processes are designed to reinforce required values and behaviours.	<input type="checkbox"/> Staff are recognised and rewarded for behaviours that reflect the organisation's required values and culture.	<input type="checkbox"/> The personal and professional behaviours of the chief executive officer and executives support and reinforce the organisation's desired values and culture. <input type="checkbox"/> Staff are recruited, developed and promoted against values, culture and leadership filters, using robust and transparent methods.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



8 monitor and evaluate



The final element of workforce planning involves the ongoing evaluation and monitoring of workforce plans and strategies.

Workforce plans and strategies need to be reviewed at least annually in order to:

- Review performance measurement information;
- Assess what's working and not;
- Adjust the plan and strategies as necessary; and
- Address new workforce and organisational issues that might occur.

Organisations that do not engage in systematic reviews of their workforce planning efforts, are at risk of not been able to respond to changes as they occur and of ultimately not achieving their business goals.

What activities are undertaken?

Review of workforce planning involves the following activities:

- Monitoring; and
- Evaluation.

8.1 monitor

Successful workforce planning is an active, ongoing and dynamic process that must be monitored and adjusted. Strategies and action plans need to be continually monitored to account for any internal or external developments that occur. This will position the organisation to be ready to address and make essential changes to the action plan when the environment demands change.

Evaluation works best when it is built into the workforce planning process from the start. This enables the identification of measures that act as signals for emerging change.

A range of demand and supply indices can be regularly monitored to provide information about progress towards achieving workforce planning goals. These can include:

- Monitoring the age profile of the workforce (as an indicator of emerging demographic change);
- The turnover rate within specific occupations; and
- Gender profile of applicants (can indicate increased or decreased participation rates of women in certain professions).

A critical component of strategic workforce planning is a human resource information system that has the required reporting capability. Ideally the Human Resource system should be able to: track data over time; record capability requirements or competence of individuals; identify the location and availability of individuals with particular capabilities and assist in their deployment; provide information on the experience and training of individuals for effective succession planning; assist in the management of recruitment and selection.

Monitoring after implementation and beyond is critical for workforce planning projects, as the outcomes may take time to manifest themselves (eg. as improved performance, better retention rates, etc).

8.2 evaluate

Evaluation of the workforce planning strategies is critical for providing feedback on internal business processes and outcomes, and for enabling continuous improvement of strategies, performance and results.

Developing evaluation metrics, involves determining what it is that needs to be measured. The task of evaluating projects and strategies is easier when the success criteria and performance measures for each workforce planning initiative have been established prior to implementation (as part of the project scoping, planning and establishing the business case).

Human resource strategies are usually measured in terms of implementation or completion of actual programs/projects. To provide more meaningful information, however measures can be designed to determine the effect the action plans have on the defined workforce planning issues. Specific measures and target levels to be achieved, as well as the desired results need to be identified.

Evaluation criteria can also be developed to relate to the specific objectives of each workforce planning initiative. For example, progress in meeting employee recruitment, retention and development challenges can be evaluated through asking whether:

- Retention rates have improved in critical hiring needs and classifications?
- The agency's needs for particular skills or expertise have been fulfilled by recruitment or training strategies?
- Knowledge transfer and retention of institutional knowledge strategies have been effective in addressing the loss of expertise and knowledge due to retirements?

Methods for obtaining feedback on how well the organisation has accomplished its action plan and the effectiveness of the outcomes can include:

- Meetings with management;
- Employee and customer surveys;
- Focus groups;
- Analysis of workforce data;
- Reviews of progress reports;
- Lessons learnt reviews;
- Organisation performance assessments; and
- Specific management reporting/measurement systems (like the Balanced Scorecard).



key questions to consider when assessing the effectiveness of workforce planning include:

- Did the project achieve its objectives?
- Reflect on learning that has occurred. What worked well? What could be improved?
- Where there any unexpected outcomes?
- Were the actions and strategies completed, and do they fulfil the goals?
- Did the action plan accomplish what the organisation needed?
- If not, have the organisation's strategies on which the plan is based changed? Are other factors preventing attainment of the goals?
- Have the conditions changed so that the strategies and actions need to be modified?
- Did the organisation meet its objectives?
- Are the workforce planning assumptions still valid?
- Do the workload and workforce gaps still exist?
- Are the skills of employees being developed quickly enough to become effective?
- Is there any imbalance between workload, workforce or competencies?
- Do the new recruits possess needed competencies?
- Has the cost to hire been reduced?
- Has overall organisation performance increased?
- Do adequate staffing levels exist?

3.3 what does better practice look like?



monitor	
Better practice guidelines	What it looks like
The organisation has a comprehensive set of metrics to assess the effectiveness of workforce strategies in improving business performance; and the metrics are incorporated in business reporting approach	<p>Systematic processes and systems exist to evaluate pre-determined success criteria for workforce planning initiatives at the project and organisational levels</p> <p>Results of evaluation are incorporated into management reporting mechanisms that are tabled for discussion at the senior management levels and at workforce planning committee meetings</p>

evaluate	
Better practice guidelines	What it looks like
The effectiveness of strategies is evaluated to determine the success or otherwise of planned changes	Technology and HR systems are integrated and used to capture and analyse predetermined metrics and trends within workforce data, for the monitoring of the effectiveness of workforce planning strategies

8.4 quick check - where is the organisation?



6. MONITOR AND EVALUATE			
6.1 MONITORING			
6.1.1 The organisation has a comprehensive set of metrics to assess the effectiveness of workforce strategies in improving business performance. The metrics are incorporated in business reporting.			
	Standard	Intermediate	Complex
33. Have mechanisms been established to assess the contribution of workforce planning initiatives to achieve business outcomes?	<input type="checkbox"/> A range of performance measures are established for workforce strategies at the outset and used to assess their impact on business performance.	<input type="checkbox"/> Quarterly reporting of progress on workforce strategies and their impact on the business is provided to all managers across the organisation.	<input type="checkbox"/> The organisation uses a range of data when analysing business performance, and this data is diverse enough to reflect the unique requirements of each business unit. The organisation's practices are regularly benchmarked against better practice organisations within and outside the sector.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Standard	Intermediate	Complex
34. Is workforce data incorporated into business reporting and management information to keep management up-to-date on workforce issues and to assist with business planning?	<input type="checkbox"/> Annual reporting of progress on workforce strategies and their impact on the business is provided.	<input type="checkbox"/> A comprehensive set of workforce planning metrics exist and strategies are monitored and evaluated against workforce planning goals (eg. metric = turnover, workforce goal = 10%).	<input type="checkbox"/> Reporting processes at the divisional or unit level combine workforce planning data with finance and operational data. Processes are continually refined so that the measurement of day-to-day operations is progressively simplified, accessible to all and easy to use. All better practice organisations are able to provide a short summary of divisional performance combining workforce planning data with finance and operational data.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.2 EVALUATION			
6.2.1 The effectiveness of strategies is evaluated to determine the success or otherwise of planned changes.			
	Standard	Intermediate	Complex
35. Are systems in place to regularly determine whether the strategies designed to address workforce issues have been effective? (eg. retention target is reached).	<input type="checkbox"/> Results of strategies on workforce issues are reviewed annually.	<input type="checkbox"/> Strategies are reviewed quarterly and adjusted and actions taken to improve performance.	<input type="checkbox"/> Managers are provided with workforce planning information and tools to support business decision-making and evaluation.
(i) Where is the organisation now?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(ii) Where do you want to be in 2 years time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





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reports in the workforce planning resource kit

- 1 workforce planning toolkit - a guide for workforce planning in small to medium sized victorian public sector organisations
- 2 a review of workforce planning in the victorian public sector
- 3 research paper: understanding the workforce planning challenges facing the victorian public sector
- 4 research paper: understanding the critical workforce segments in the victorian public sector
- 5 future directions for workforce planning: actions to improve workforce planning outcomes across the victorian public sector
- 6 future directions for workforce planning: analysis and discussion