Victorian Public Sector Commission

VICTORIA State Government

Strategic workforce planning

Welcome to the strategic workforce planning toolkit

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About the toolkit

We have developed this toolkit to support all levels of practitioners in strategic workforce planning including employees in people and culture, change management and corporate strategy.

It's a flexible, modular approach to strategic workforce planning that can help you:

- plan for changes in the operating environment of your organisation or business area
- establish the future needs of your workforce
- undertake end-to-end strategic workforce planning
- complement existing strategic workforce planning or people initiatives
- enhance your knowledge of strategic workforce planning.

Who the toolkit is for

We have developed this toolkit to support all levels of practitioners in strategic workforce planning including employees in people and culture, change management and corporate strategy.

What's in the toolkit

The strategic workforce planning toolkit has 3 stages:

- Discover – where you explore changes, identify scenarios and their impacts on the workforce
- Design – where you design a response to the changes that may impact your workforce in the future
- Build – where you work out the actions required to move your workforce from the present into the future.

How to use the toolkit

You can use this toolkit in a few ways:

- as self-paced modules you can do on your own or in small teams
- as facilitated workshops with teams or larger groups, which we recommend to get the most out of this toolkit

There are 11 modules across the 3 stages that include:

- suggestions on who to involve in each module
- information about the strategic workforce planning process
- templates for you and your stakeholders to use
- PowerPoint slides and speaking notes if you run a module as a workshop.

How we developed the toolkit

To design this toolkit, we:

- co-designed the strategic workforce planning process with Victorian Public Service departments
- tested the process from start to finish with teams in 2 departments.

An overview of strategic workforce planning

Find out how this process works from start to end

What strategic workforce planning is

Strategic workforce planning is a process to:

- align your workforce to future business needs
- determine what you need to do to create, access and mobilise the workforce you need.

You can use strategic workforce planning to:

- consider any changes that may impact your business area
- define the future workforce required to deliver on your strategic objectives
- develop a plan to prepare your workforce for the future.

Other types of workforce planning

There are other types of workforce planning such as:

- tactical workforce planning – which focuses on things such as rostering and servicing seasonal and peak demands
- operational workforce planning – which focuses on the workforce required now to do the work of today.

We have designed this toolkit to support strategic workforce planning in your organisation.

Parts of it may also be helpful in operational and tactical workforce planning as well as other people initiatives.

Strategic workforce planning in the Victorian Public Service

In the Victorian Public Service, we take a 3-to-5-year view of your workforce needs including the:

- skills – or capabilities required for the future
- size – of the future workforce
- site – or location of the future workforce
- shape – or structure of the future workforce
- source – of the skills or roles.

What strategic workforce planning complements

Strategic workforce planning complements and can inform people initiatives and existing processes such as:

- capability development planning
- employee engagement
- workforce reporting
- workforce scheduling
- succession planning
- talent attraction strategies
- learning and development offerings.

Strategic workforce planning stages

Discover stage

In the discover stage, you'll:

- explore possible changes that may impact your business area
- create scenarios to help you consider the way you'll work in the future and what work looks like for your business area.

Some questions you'll answer are:

- What has driven change in the past?
- What trends are we seeing that could impact our future world?
- What changes will impact the way we work in the future?
- What are some of the future scenarios that may impact our organisation?
- What could work look like in the future for our organisation?

Design stage

In the design stage, you'll:

- identify what you may need to do to respond to future changes
- consider the skills, source, shape, size and site of your organisation's future workforce.

Some questions you'll answer are:

- What are the capabilities and roles we need in the future?
- How will we source the workforce we need?
- What structure would work best for our team?
- What workforce capacity do we need for the future?
- Where will we be located?

Build stage

In the build stage, you'll:

- come up with a plan to create the workforce you require
- consider where your workforce is now, where you want it to be in the future and how you'll get there.

Some questions you'll answer are:

- What is the gap between our existing and desired workforce?
- What actions do we need to take to get the workforce required in the future?
- How can we adapt our plans to ongoing changes?

Key outputs

We've designed this process so at the end of it you'll have 3 key outputs:

1. a set of scenarios your organisation may face in the next 3 to 5 years that you'll need to prepare for
2. your first action steps towards your workforce goals for the next 12 months that you'll review every 6 weeks
3. a 3-to-5-year plan that you'll review in line with your business planning cycle.

Before you start strategic workforce planning

Find out what to do before you start using this toolkit

This toolkit will help you break strategic workforce planning into easy steps.

Before you start, we recommend you look at your organisation's corporate documents such as the:

- vision and mission for your organisation
- organisation's strategic plan
- business area's annual plan or program of work for the next 12 months
- service catalogue for your business area
- organisation's website which will set out its purpose and may talk about the different areas of the organisation.

Support from us

Email us at swp@vpsc.vic.gov.au if you need:

- advice on anything in this toolkit
- case studies on how we've run this process with other public sector organisations
- facilitation tips for workshops
- workforce data reports
- people matter survey data reports.

Tips on running workshops in every stage

Practical tips for in-person or online

Format

Open allClose all

Physical

If your team is doing this in person, use our templates to create your working space.

You'll need:

- a blank wall or board
- markers
- post-it notes
- sticky dots.

Remote or hybrid teams

If your team is working remotely, use our templates or replicate what we have in our templates in an online tool.

When you choose a tool, check if anyone in your team has accessibility needs and that they'll be able to easily use it.

Some tools you can use are:

- Miro
- Mural.

But this is just a list of examples. There are a lot of tools.

Facilitator support

In each module, we've listed facilitator tips for each workshop.

We developed these tips after running these workshops with other public sector organisations.

For all your workshops, it's a good idea to have a scribe to capture group discussions. This lets the facilitator focus on presenting.

Scheduling the workshop

Set up your workshop at a time where you'll get the best results.

This means to think about the diverse needs of each of your team members.

Think of things like this:

- Does anyone have kids or caring responsibilities that mean they need to start late or leave early?
- Is there a time that you need to avoid, such as first thing or when a regular meeting happens?

When you send our your invite, always ask if anyone has access requirements.

Good practice at the start of your workshop

Open allClose all

Acknowledge country (20 seconds)

Always acknowledge the traditional owners before you start.

It shows your respect for Aboriginal and/or Torres Strait Islander people.

Confirm pronouns (20 seconds)

Go around the room and have everyone confirm their pronouns or ask everyone to display them either in their screen name or written down on a piece of paper.

This helps support transgender and gender diverse people and instil empathy for diverse people in your teams' minds.

Confirm access requirements (20 seconds)

Ask everyone to let you know either in private or in the workshop if they have any access requirements to take part.

Remember, it's up to them to share information about themselves with you or the group.

Set the scene (5 minutes)

Lay down the rules for taking part, such as:

- everyone will get a turn to speak
- don't speak over the top of others

- if we run into an issue we can't resolve, we'll put it aside to follow up outside the workshop.

Confirm who is in the room and if anyone is missing.

Tell everyone what the objectives of this workshop are.

Discover stage: explore trends, changes and their impacts on your workforce

This is the first stage of the strategic workforce planning toolkit

The aim of this stage is to explore trends and changes in your operating environment and what this may mean for your workforce.

In the discover stage, you'll:

1. consider what has driven change in the past
2. identify any societal, technological, economic, environment and political trends to work out what may impact your business area in the future
3. use these trends to develop growth, constraint, collapse or transformation future scenarios for your business area
4. shortlist the scenarios based on how likely they are to occur and how prepared your business area is to respond
5. develop the ripple effects and impacts of your scenarios to create more detail
6. map the services or products you need to deliver based on your business area's strategy and identify your stakeholders and the processes and tools you'll need for each scenario.

How to use the modules in this stage

We recommend you complete each module:

- in a sequence from module 1 to 5
- in a workshop style to maximise collaboration and creativity.

But you can also do each module as a small working group.

People to involve

For this stage, we recommend you have:

- a mix of employees from the business area with at least a director or executive director
- relevant HR business partners or people and culture employees
- a communications manager or change management specialist
- a principal policy or corporate strategic advisor.

Access the modules in the discover stage

There are 5 modules in this stage:

Design stage: design your future workforce

This is the second stage of the strategic workforce planning toolkit

The aim of this stage is to design the workforce you'll need in the future.

How to use the modules in this stage

We recommend you complete each module:

- in a sequence from module 1 to 4
- in a workshop style to maximise collaboration and creativity.

But you can also do each module as a small working group.

Who to involve

For this stage, we recommend you have:

- a mix of employees from the business area with at least a director and executive director
- relevant HR business partners or people and culture employees
- a communications manager or change management specialist
- senior recruitment specialists or a strategy adviser who understands trends affecting your organisation
- senior learning and development specialists
- digital or technology specialists.

If you can't get everyone to attend, try to send people who can't make it your outputs so

they can agree to things discussed.

Access the modules in this stage

There are 4 modules in this stage:

Build stage: build your strategic workforce plan

This is the final stage of the strategic workforce planning toolkit

The aim of this stage is to come up with a plan to build the workforce you'll need in the future.

In the build stage, you'll:

- revisit and validate any outputs you've created as part of your strategic workforce planning process
- analyse the gap between where your business area is now and where you want to get to
- develop kata boards to plan how you'll implement and monitor your workforce change
- develop a change canvas to help you build a narrative for change
- come up with a roadmap to define the steps you need to take.

How to use the modules in this stage

We recommend you complete each module:

- in a sequence from module 1 to 2
- in a workshop style to maximise collaboration and creativity.

But you can also do each module as a small working group.

Who to involve

For this stage, we recommend you have:

- a broad mix of your executive team with at least one director and one executive director
- a communications manager or change management specialist
- relevant HR business partners or people and culture employees.

Access the modules in this stage

There are 2 modules in this stage: