

Workforce Planning Tool



This Workforce Planning Tool (WPT) is to help you to start analyzing your current and future workforce data allowing you to identify strengths and weaknesses. Please complete this in full, in order to capture all the data needed to develop a workforce plan (WP).

Current Workforce Data

Outline the demographics of your organization's current workforce (age, ethnicity, gender, status [full-or part-time], years of service, etc.) If you file an Affirmative Action Plan (AAP) each year, use that data to answer these questions.

Demographic	Data
Average employee age	
Retention rate (If you consider your retention rate is low, consider reviewing your employee feedback results and/or exit interviews to gain insight into why employees are leaving your organization.)	
Turnover within one year	
Average turnover	
What percentage of your staff is retiring each year (retirement rate)?	
What is the average retirement age of your employees?	
How many staff are eligible to retire within one year?	
How many staff are eligible to retire within five years?	
How many staff are eligible to retire within 10 years?	
Is your organization prepared to replace those who may retire? What are the top three positions that have the highest number of staff who may retire in the next three to five years?	1. 2. 3.
Describe your workforce by percentage.	Union: Non-Union: Professional: Credentialed: Certified: Experienced:

Demographic	Data
Ethnicity of Employees: List the percentage of the total employee population in each group.	
African American/Black	
American Indian/Alaska Native	
Asian/Pacific Islander	
Hispanic/Latino	
White/Caucasian	
Other	
Ethnicity of Patients/Clients/Members: List the percentage of patients/clients/members your organization treats annually.	
African American/Black	
American Indian/Alaska Native	
Asian/Pacific Islander	
Hispanic/Latino	
White/Caucasian	
Other	
It is essential that the organization's employee ethnicity percentages closely match patient/client/members ethnicity percentages. If they match, answer "yes." If not, answer "no."	
Gender of Employees: List the percentage of employees in each of the following groups.	
Female	
Male	
Gender of Patients/Clients/Members: List the percentage of patients/clients/members in each of the following groups.	
Female	
Male	
It is essential that the organization's employee ethnicity percentages closely match patient ethnicity percentages. If they match, answer "yes." If not, answer "no."	
Professional Level: List the percentage of employees in each of the following groups.	
Entry Level	
Clinical	
Professional	
Management/Executive	
Do you need a different mix of professionals to deliver services in the next three to five years?	

Demographic	Data
Critical Workforce: List the top five positions that you consider most critical to delivering services.	<ol style="list-style-type: none"> 1. 2. 3. 4. 5.
Credentials: List the top five credentials needed to deliver quality services.	<ol style="list-style-type: none"> 1. 2. 3. 4. 5.
Are there any gaps between the top five critical positions and the top five credentials identified above? If so, where?	
Is your current workforce performing to the full extent of their credential and/or education? If not, why not?	
List the top five positions that should be evaluated if they are not working to the top of their credential and/or education.	<ol style="list-style-type: none"> 1. 2. 3. 4. 5.
What is your staff ratio per manager and what are the titles of those manager positions? (It is also important to look at each manager's employee feedback scores, and determine if he/she is an effective manager. You also should review the turnover rate for the employees that person manages and note if it is high.)	
What positions are currently open?	
List the positions filled in the last two to three years and how long it took to fill them.	
List your top three sources for qualified candidates from which positions have been filled in the last two to three years (e.g., job boards, internal candidates, referrals).	
Does your organization have a recruitment strategy?	
What is your payroll budget, including severance payments? Are there any trends or areas of concern?	

Future Workforce Data: Determine what competencies and positions you will need in the future.

Demographics

Data

Are there any current competency gaps? List any here.	
What positions do you need to fill that are new positions versus replacements?	
When a vacancy is created and/or a new position is posted, do you review it for new competencies? How often are new competencies identified?	
What are your top three long-term goals that will impact your workforce in the next three, five and 10- years?	1. 2. 3.
What are your top five workforce concerns associated with those long-term goals?	1. 2. 3. 4. 5.
Do you have a workforce planning committee?	

Review Your Answers

Go back and highlight answers in red that fit these criteria:

1. Any “no” answers.
2. If you were unable to answer a question.
3. Any answer that was incomplete.
4. Any answer that generated concern.

These highlighted-areas show you where you need to focus in order to develop an effective WP. Now that you have identified potential gaps, you are ready to move ahead to the next section of the assessment, which will help you develop effective strategies to address those gaps.

WPT: Strategy Development

Following is an assessment tool to help you start developing your strategy. Please complete this assessment in full, in order to capture all the data needed to develop an effective WP.

Strategy: Understanding and Addressing the Business Need
What would your organization like to accomplish in creating a WP? Name the top three expected outcomes. <ol style="list-style-type: none">1.2.3.
List the top three changes you expect to happen in the next five years that will impact your organization's workforce (e.g., changes in your mission, goals, or shift to interdisciplinary team-based services or new technology). <ol style="list-style-type: none">1.2.3.
List the top three skills that are critical to meeting your goals and objectives (e.g., delivering quality services). <ol style="list-style-type: none">1.2.3.
List stakeholders who should be included in creating your WP. It is valuable to have a task force oversee development or revamping of the WP. <ol style="list-style-type: none">1.2.3.4.5.6.
List potential external strategic partners who could contribute to the WP. <ol style="list-style-type: none">1.2.3.4.5.6.
List five occupational skills that will no longer be needed at your organization in the next five years. <ol style="list-style-type: none">1.2.3.4.5.

List five new occupational skills that you will need in the next five years.

- 1.
- 2.
- 3.
- 4.
- 5.

List five new positions you anticipate will be needed in the next five years.

- 1.
- 2.
- 3.
- 4.
- 5.

List at least three ways your organization is addressing expected skill imbalances due to attrition, including retirement, over the next five years.

- 1.
- 2.
- 3.

Review Your Answers

Go back and highlight answers in red that fit these criteria:

1. Any "no" answers.
2. If you were unable to answer a question.
3. Any answer that was incomplete.
4. Any answer that generated concern.

These highlighted areas show you where you need to focus in order to develop an effective WP strategy. Now that you have identified potential gaps, you are ready to move ahead to the next section of the assessment.

WPT: Planning

Following is an assessment tool to help you start analyzing your current and future workforce planning methods and help you identify strengths and weaknesses. Please complete this assessment in full in order to capture all the data needed to develop an effective WP.

Planning: It is important to understand what onboarding, retention/ training, pipelines, and partnerships will make the WP work in your organization.

Onboarding and Retention/Training

Outline three components of your current onboarding program.

- 1.
- 2.
- 3.

List the types of programs that are in place that help to retain employees in their first year.

- 1.
- 2.
- 3.

List types of ongoing training you have in place for current employees whose roles have changed.

- 1.
- 2.
- 3.

Outline the training that has been utilized to enhance employee's skills over the last 3-5 years.

- 1.
- 2.
- 3.

What types of training programs have been implemented in the last five years to address leadership, management, technical, and/or new skills?

- 1.
- 2.
- 3.

List what type of retraining the organization will provide to its employees in order to have a highly skilled workforce.

- 1.
- 2.
- 3.

What have you identified as leadership needs (e.g., through a leadership workforce analysis or leadership planning and development)? Have you created a succession plan?

- 1.
- 2.
- 3.

Workforce Pipelines and Partnerships

What are your top three to five retention strategies?

- 1.
- 2.
- 3.
- 4.
- 5.

How are you successfully reaching out to attract new employees (e.g., referral incentives, alumni programs)?

- 1.
- 2.

Who have you identified as community strategic partners?

- 1.
- 2.
- 3.

What strategies and tools are other organizations or your competitors using to recruit talent?

- 1.
- 2.

Describe three ways you have worked with high schools, academies, colleges, universities, and community workforce development centers to help develop a workforce pipeline that supports your future workforce needs.

- 1.
- 2.
- 3.

Review Your Answers

Go back and highlight answers in red that fit these criteria:

1. Any “no” answers.
2. If you were unable to answer a question.
3. Any answer that was incomplete.
4. Any answer that generated concern.

These highlighted areas show you where you need to focus in order to develop an effective WP. Now that you have been identified potential gaps, you are ready to move ahead to the next section of the assessment.

WPT: Evaluation

Following is an assessment tool to help you evaluate your WP and identify strengths and weaknesses.

Evaluation: It is important to understand or see success in the workforce plan, and the ability to understand success around the plan.
What timelines and milestones have been established to evaluate your WP?
Who are the top three staff members who have effectively implemented the action strategies of your WP? 1. 2. 3.
How has the WP been communicated to the organization, who was the audience, and what vehicles were utilized?
How often have you communicated about the WP? Annually? Quarterly?
Is the WP accomplishing its goals?
Have conditions changed so that strategies outlined in the WP need to be revised? If so, where?
Are assumptions about supply and demand that were considered when the WP was first developed still valid? If not, indicate where more focus is needed.

Review Your Answers

Go back and highlight answers in red that fit these criteria:

1. Any "no" answers.
2. If you were unable to answer a question.
3. Any answer that was incomplete.
4. Any answer that generated concern.

These highlighted areas show you where you need to focus in order to develop an effective evaluation of your WP.