



- BSB50215 – DIPLOMA OF BUSINESS
- BSB50618 – DIPLOMA OF HUMAN RESOURCES MANAGEMENT
- BSB51918 – DIPLOMA OF LEADERSHIP AND MANAGEMENT

Study Support materials for BSBHRM513 - Manage Workforce Planning



STUDENT HANDOUT

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1 Research workforce requirements	1.1 Review current data on staff turnover and demographics 1.2 Assess factors that may affect workforce supply 1.3 Establish the organisation's requirements for a skilled and diverse workforce
2 Develop workforce objectives and strategies	2.1 Review organisational strategy and establish aligned objectives for modification or retention of the workforce 2.2 Consider strategies to address unacceptable staff turnover, if required 2.3 Define objectives to retain required skilled labour 2.4 Define objectives for workforce diversity and cross-cultural management 2.5 Define strategies to source skilled labour 2.6 Communicate objectives and rationale to relevant stakeholders 2.7 Obtain agreement and endorsement for objectives and establish targets 2.8 Develop contingency plans to cope with extreme situations
3 Implement initiatives to support workforce planning objectives	3.1 Implement action to support agreed objectives for recruitment, training, redeployment and redundancy 3.2 Develop and implement strategies to assist workforce to deal with organisational change 3.3 Develop and implement strategies to assist in meeting the organisation's workforce diversity goals 3.4 Implement succession planning system to ensure desirable workers are developed and retained 3.5 Implement programs to ensure workplace is an employer of choice
4 Monitor and evaluate workforce trends	4.1 Review workforce plan against patterns in exiting employee and workforce changes 4.2 Monitor labour supply trends for areas of over- or under-supply in the external environment 4.3 Monitor effects of labour trends on demand for labour 4.4 Survey organisational climate to gauge worker satisfaction 4.5 Refine objectives and strategies in response to internal and external changes and make recommendations in response to global trends and incidents 4.6 Regularly review government policy on labour demand and supply 4.7 Evaluate effectiveness of change processes against agreed objectives

Getting the right people in the right place at the right time with the right skills

Workforce planning is a term used to describe the planning process undertaken to ensure an organisation has the right people, with the right skills, at the right time. It is simply a methodical process that documents the directions in which a work area is heading and provides managers with a tool for making human resource decisions now and into the future.

Planning human resource requirements is one of the biggest challenges for businesses and their leaders, and takes into account not only the man resource factors, but ties this in to overall strategic plans, financial and budget considerations, environmental issues and legislative requirements/regulations and governance. Ultimately undertaking a workforce planning activity is a snapshot of what human resources are in place at a particular time, and what staffing requirements are needed into the future.

Without planning human resource needs and talent required in the future, it is impossible to meet the business objectives.

At its simplest, workforce planning is about trying to predict the future demand for different types of staff and seeking to match this with supply.

WHY DO WORKFORCE PLANNING?

Workforce planning helps an organisation forecast future conditions and environments, and allows managers to anticipate change and put strategies in place to ensure the organisation is not caught out and left ill-equipped to meet the needs of their clients.

Organisations face many challenges, some of which include:

- geographic distribution
- an ageing population
- rapidly changing academic focus requiring flexibility and fluidity in the workforce
- dual sector requirements and subsequent impacts
- recruitment and
- retention issues associated with a booming mining industry
- legislation/policy/governance requirements
- various financial constraints

Workforce planning assists with responding to challenges including addressing the requirements of an aging workforce, building research capacity and performance, addressing changes in organisation policy and/or legislation and ensuring the alignment of business strategy with budgetary restraints.

All of the challenges listed above require reviewing service delivery approaches and an analysis of different skill requirements to meet the organisational objectives. Workforce planning can assist with anticipating staff and skill requirements for the future and ensure the needs of the organisation and the clients are met.

WHAT ARE THE BENEFITS OF WORKFORCE PLANNING?

Workforce planning can result in the following benefits:

- The identification of future staffing requirements and any possible skill shortages or over supply
- A planned recruitment strategy including appropriate time frames and costs
- A plan to close skill gaps can be prepared
- Specific recruitment or training initiatives can help plan for new jobs
- Staffing costs may be reduced through close analysis of staffing requirements and ensuring appropriate levels of staff
- Staff development needs can be better identified
- Employees whose skills are unlikely to meet future needs can be retrained

WHO IS RESPONSIBLE FOR WORKFORCE PLANNING

It is the responsibility of management to:

- develop the leadership capability for workforce planning
- support the development of human resource policies and strategies to help improve recruitment, retention, development and performance of staff
- support the delivery of division workforce plans and undertake environmental scanning and identify potential risk areas for the organisation in the workforce
- provide advice on the potential impact of risks on service delivery and identify the systems, processes and programs required to manage identified risks. It is the responsibility of management to:
 - prepare a three year workforce plan which will be reviewed and updated annually
 - provide projections of the workforce numbers required to deliver future services over the next three years including any new roles/functions that may be required
 - actively manage their workforce and take action on vacancies, for example through redesign of positions and/or services, recruitment, succession planning, development or redeployment of existing staff
 - identify actions to address any gap between their workforce projections and the available supply of staff and plan for and secure resources to close the gaps
 - review their workforce practice, strategies and plans to ensure they contribute to the attraction, retention and development of a capable workforce to achieve organisational goals.

HOW OFTEN DO I NEED TO DO WORKFORCE PLANNING?

Workforce planning should occur annually.

HOW DO I GET STARTED?

There are many considerations when undertaking a workforce planning activities. Outlined below are some simple steps to help you on your way:

Step 1

Access planning data and plans

- workforce profile data
- strategic plans
- operational and management plans
- environmental scanning
- legislation/regulations/governance

Step 2

Analyse current operations

- review budget/current financial situation
- identify current technology infrastructure/systems
- identify legislative and regulatory parameters
- review current policies and processes
- workforce profile data (as listed above)
- review environmental factors

Step 3

Scenario planning and forecasting

- identify probable scenarios based on future projects and trends
- review planning considerations relevant to the department
- identify likely impacts on the workforce
- identify future workforce supply and demands
- identify workforce gaps
- determine staff demand based on analysis of future projections and trends
- identify skills no longer required in the future due to changing organisational needs
- identify new skills required in the future to meet organisational goals
- review labour market trends and identify any issues associated with availability of workers
- identify critical jobs (ie those positions that are difficult to recruit and/or difficult to retain staff)

Step 4

Identify planning initiatives and strategies

- recruitment and retention strategies

- career development and mentoring programs
- staff engagement surveys
- succession planning
- job redesign
- review of policies and processes
- identify and review new systems and technology
- budget planning
- academic staff promotion initiatives
- pre-retirement contracts
- Postretirement employment for academic staff to manage knowledge transfer. This may include adjunct, honorary and casual appointments

Step 5

Submit workforce plan for approval

- following the planning phase, submit the Workforce Plan with the budget in line with the annual budget cycle
- feedback on the workforce plan will be provided via the delegated authority as part of the budget planning process

Step 6

Implement workforce plan

- Once approval of the workforce plan has been granted, strategies and planning initiatives can then be implemented. Strategies and planning initiatives may include introduction of changes to technology and infrastructures; process re-engineering and introduction of revised or new efficient processes and systems; introduction of changes to existing policies or development of new policies; staff training and development; career development and mentoring programs, job analysis and design; attraction, retention and recruitment strategies, pre-retirement contracts, succession planning, introduction of flexible staffing arrangements and staff surveys.
- Reclassification of positions to be administered as per Position Management and Job Evaluation Policy, Principles and Procedures.
- Strategies and planning initiatives should include an implementation and communication plan.
- Where required, seek advice and/or assistance from management. In some cases, particular strategies and planning initiatives have broader reaching impacts beyond the individual work area.

Step 7

Review and evaluation 12 months from implementation:

- review strategies and evaluate impact of changes (positive/negative)
- identify if further consultation is required with management
- identify if any policies/processes need further refinement
- review staff training and development requirements
- identify changes against business planning considerations and update workforce plan accordingly

WHERE CAN I FIND INFORMATION ABOUT MY CURRENT STAFF AND WORKFORCE PROFILE?

Workforce profiling consists of data which describes a range of distribution of the workforce for one or more attributes including:

- classification level
- discipline/specialisation
- employment category (continuing, fixed term and casual)
- employment mode (full-time, part-time, fractional)
- location
- age
- tenure
- gender

- skills
- formal qualifications
- knowledge and experience

WHAT IF I IDENTIFY I WILL NEED MORE STAFF WITH PARTICULAR SKILLS AND POSSIBLE RETENTION ISSUES?

If you identify you will fall short of staff with critical skills in the near future, it's time to start planning. Review your budget and identify costs associated with advertising/recruiting/relocating and remuneration packages required to attract strong candidates. Think about the timing of recruitment, and when this will need to occur. If you need new positions, think about position descriptions that require updating, re-profiling and redesigning.

Think about what changes you need to make to your organisational chart, discuss budgetary requirements and start making your case for additional funds if required.

WHAT IF I IDENTIFY AN OVERSUPPLY IN A PARTICULAR AREA?

Think about the reasons why this has happened and whether this is only a short term issue which may be resolved in the longer term. If the issue is only for the short term, is there alternative work staff could be tasked with, or appropriate secondments or retraining that could occur?

WHAT IF I DON'T DO WORKFORCE PLANNING?

- budgets and financial resources may be wasted
- limited understanding of employee skills required now and in the future
- no employees available to carry out organisation's objectives
- goals not achieved and poor morale affecting staff and lack of service to clients.

Helpful Websites:

<http://www.businessdictionary.com/definition/turnover.html>

<http://www.ere-media.com/ere/not-all-employee-turnover-is-bad-celebrate-losing-the-losers/>

<http://smallbusiness.chron.com/create-diverse-workplace-10154.html>