Workforce Planning

GUIDE FOR MANAGERS

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

WHAT IS WORKFORCE PLANNING?

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 human 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.

CQUniversity is facing 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 within the Higher Education sector including addressing the requirements of an aging academic workforce, building research capacity and performance, addressing changes in higher education 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 the People and Culture Directorate to:

- develop the University's 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 faculty/division workforce plans and undertake environmental scanning and identify potential risk areas for the University 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 the Directors and Deans 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 University 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 • review current student numbers • review academic programs on offer • 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 as outlined in Appendix 1 and 2 • 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 • Post retirement employment for academic staff to manage knowledge transfer. This may include adjunct, honorary and casual appointments.

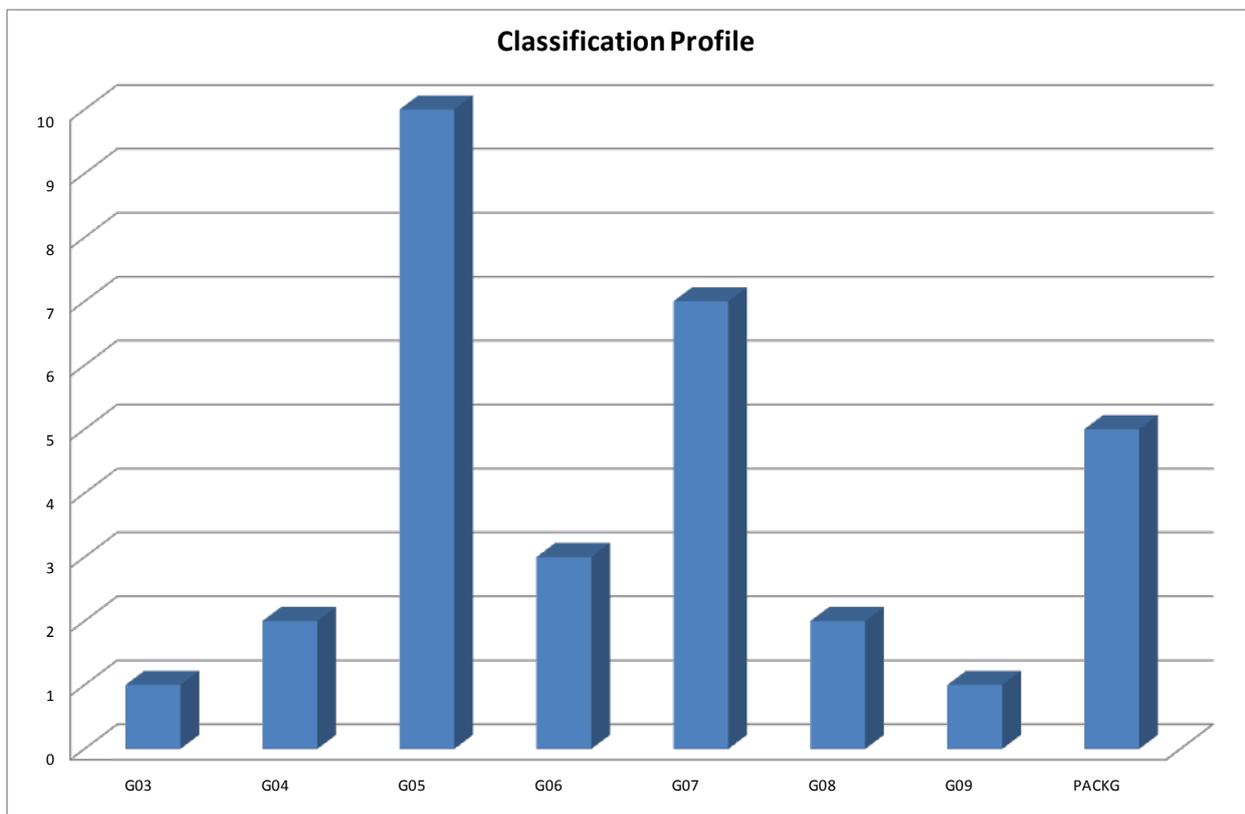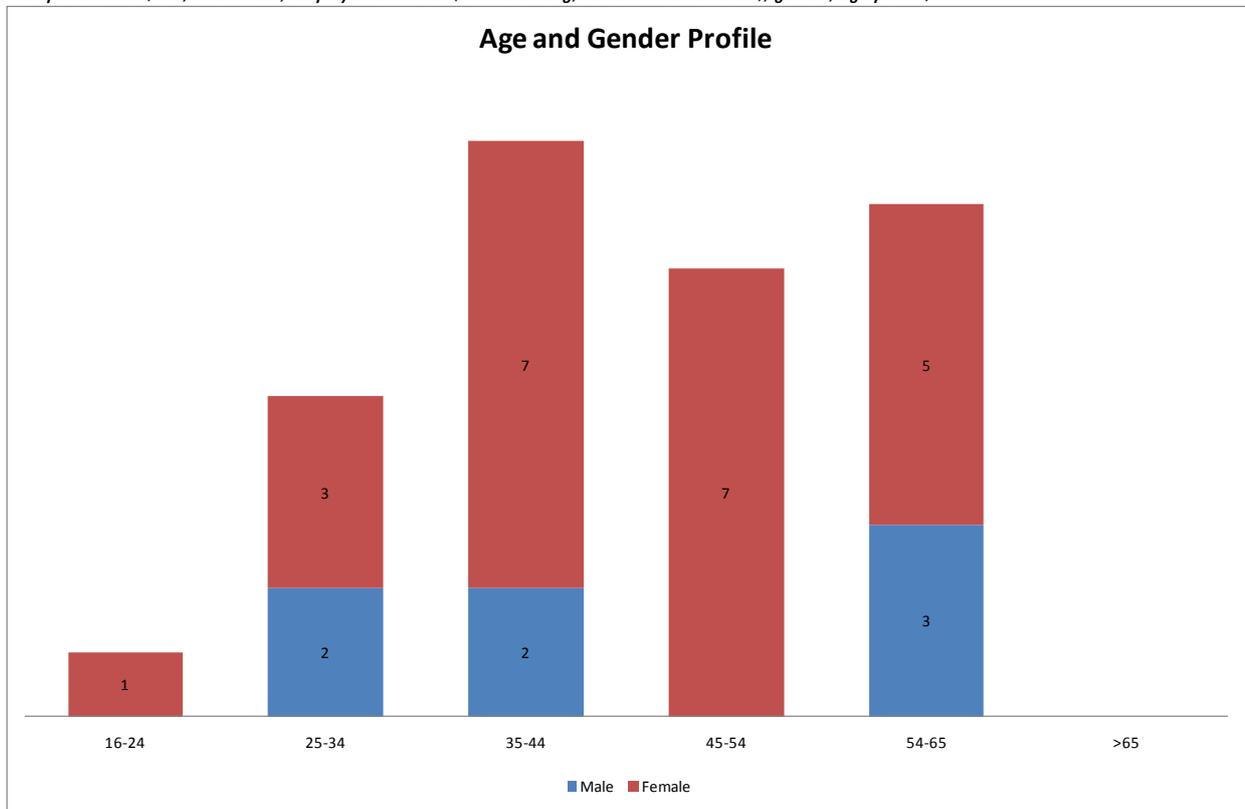|	
STEP 5 Submit workforce plan for approval	• following the planning phase, submit the [Workforce Plan](#) with the budget in line with the annual budget cycle • feedback on the workforce plan will be provided via the delegated authority as part of the budget planning process
STEP 6 Implement workforce 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 University Position Management and Job Evaluation Policy, Principles and Procedures. • Strategies and planning initiatives should include an implementation and communication plan. A template is provided in the Workforce Plan. • Where required, seek advice and/or assistance from People and Culture. 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 People and Culture • 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.

As part of implementing workforce planning across CQUniversity, People and Culture have developed a Template to assist you with analysing and forecasting your human resource needs. In addition People and Culture will provide organisational units with their workforce profile data for a range of attributes including age profile, staff classification and role, which can be analysed and shown in various charts. Below is an example of a graph for a particular work area which can give you an idea of your current workforce, at a glance:

Staff profile data (FTE, Headcount, Employment status (i.e. continuing, fixed term and casual), gender, age profile)*

Age and Gender Profile

Age	Male	Female
16-24		1
25-34	2	3
35-44	2	7
45-54		7
54-65	3	5
>65		

■ Male ■ Female

Classification Profile

	G03	G04	G05	G06	G07	G08	G09	PACKG
	1	2	10	3	7	2	1	5

In addition to this you are able to access OrgPlus to analyse your current organisational structure which can also be useful. Remember the initial reports provided are a snapshot of your workforce profile at a certain point in time, and should you require any further reports, please don't hesitate to contact People and Culture.

WHAT IF I IDENTIFY I WILL NEED MORE STAFF WITH PARTCIULAR 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. For further assistance with developing appropriate future recruitment strategies, contact the People and Culture Directorate.

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? If it is an issue into the future, perhaps it is time to consult the CQUniversity Managing Workplace Change Guidelines, and seek advice from your Senior Employee Relations Adviser.

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.

WHAT OTHER TOOLS WILL HELP ME

People and Culture suggest you refer to the below documents, plans and templates which will all assist with analysing your current and future human resource needs. The Workforce Planning Template developed by the People and Culture Directorate is a simple, methodical document which will prompt you to think about all of the areas which affect staffing and resources.

- Workforce Planning Framework

- Workforce Planning Template

- Managing Workplace Change

- CQUniversity Strategic Plan

- Aboriginal and Torres Strait Islander Career Development and Employment Strategy

- HR Benchmarking Reports

WHAT DO I DO WHEN I HAVE COMPLETED WORKFORCE PLANNING?

Once you have completed your Workforce Plan template, this must be approved before implementation can commence. The final Workforce Plan must initially be forwarded to the Employee Relations section within the People and Culture Directorate, once approved by the relevant Head/Director/PVC and Executive Dean. The People and Culture Directorate will present individual Workforce Plans to the Vice-Chancellor's Advisory Committee for information, discussion and analysis. Where required, the People and Culture Directorate will provide change management support to organisational units to ensure optimum consultation, equity and consistency across the University.

Workforce Plans will be reviewed annually once established, and may be monitored more frequently depending on whether forecast gaps present a high risk to the University.

ANNUAL TIMELINE

Month	Activity	Outcome
FEB	PAC submits HR data to the UQ Benchmarking Program for the 4th quarter of the previous calendar year.	Access to HR metrics for the whole of University including comparisons against similar Universities in regional areas.
APRIL	Forecasts, gaps, issues and risks from Workforce Plans endorsed from the **previous year** are reviewed and monitored for any significant changes or impacts.	Workforce strategies from previous year are reviewed and any major issues flagged to ensure all is being addressed
JUNE	PAC prepares workforce profiles for organisational areas, including key staffing measures, trends and benchmarks. Faculties prepare additional data and/or measures related to teaching and research	Workforce profiles for organisational units.
31 OCT	All Workforce Plans are due to People and Culture Directorate ready for presenting at VCAC	Workforce Plans analysed and endorsed, and strategies to address workforce issues implemented
DEC	All Workforce Plans presented at VCAC and endorsed	Human Resource Gaps and issues are identified at the senior level, and strategies and plans implemented.