#  Skills Active – Workforce Plan

# Basic Templates



***Nāku te rourou nāu te rourou ka ora ai te iwi***

*With my basket and your basket the people will thrive*

## Invest in skills | Invest in people

#

#  Basic Templates

### Step 1: Business context and environment

##### Use these templates to capture your business goals and influencers:

##### Our Business Goals

|  |  |
| --- | --- |
| Our Vision  | What is our vision?  |
| Our Goals  | What are our short, medium and long term business goals? |
| Our Customers  | Who are our customers and who will our customers be in 10 years’ time? |

##### The internal and external factors that may have an impact on us reaching these goals

|  |  |
| --- | --- |
| Impacts of where we are heading | Are we planning any significant changes, are we introducing new ways of working, are we anticipating future growth or downsizing?  |
| External impacts  | What is happening outside of our business that might affect us? Are there any industry trends or changes, economic conditions, market shifts that will impact our business? |
| Internal impacts  | What is currently happening within our business, and how is this affecting us?  |

##### What this means for your workforce

|  |
| --- |
| What workforce skills and capability will you need to meet our business goals? Can you identify any areas that may impact your workforce needs? (E.g. additional staff, new skills, new ways of working) |

### Step 2: Current workforce profile

##### Current Workforce Profile – Skills, Capability and Capacity

|  |  |
| --- | --- |
| Types and numbers of roles  | What are the different types of roles in our workforce?  |
| Skill and qualification level  | What are the current skills, competencies and development goals of our workforce? |
| Type of employment  | What are the types of employment in our workforce? Are they paid or unpaid? Are they part-time or full time?  |

##### Current Workforce Characteristics

|  |  |
| --- | --- |
| Gender | What is the gender distribution of our workforce?  |
| Ethnicity | What is the ethnicity profile of our workforce?  |
| Age  | What is the age profile of our workforce? |
| Earnings  | What is the earnings profile of our workforce?  |
| Distribution  | Where is our workforce located?  |
| Other employment characteristics  | What are some of the other employment characteristics of our staff?* vacancy and recruitment activities, for example: vacancy lengths, recruitment rates, application numbers
* exit information (this may be sought through employee surveys, termination information, resignation letters)
* influences on staff (for example change in business direction, budgets, market pressures)
 |
| Workforce support  | How are staff rewarded and recognised? What kind of support and development structures are in place?  |
| Regional/national comparison | How does our workforce compare to similar businesses and organisations? How do we compare to the regional and national picture?  |

### Step 2: Current workforce strengths analysis

##### What are your workforce strengths and weaknesses with regard to skills, capability, capacity and workforce characteristics

|  |  |  |
| --- | --- | --- |
|  | Advantages | Disadvantages |
| CURRENT Think about your currentworkforce | Strengths * Current resources, capability and performance strengths
* Things we do well
 | Weaknesses * Current resources, capability and performance issues
* Things we don’t do so well
 |
| FUTUREThink about where you are going | Opportunities * Opportunities to make the most of our existing workforce
* Workforce collaboration, immigration and new developments that will attract our required workforce demographic
 | Threats* Workforce issues may threaten our business, such as: workforce competition, skills shortages, regional demand, distribution challenges, recruitment and retention issues
 |

### Step 3: Future workforce requirements

##### Future Workforce Profile – Skills, Capability and Capacity

|  |  |
| --- | --- |
| Types and numbers of roles  | * What are the different types of roles that will be undertaken?
* What is our ideal capacity, where are our skills shortages and now where are they likely to be in future?
* What future business functions will exist, and who will we need to do these functions?
 |
| Skill and qualification level  | * What will the skill, competency and development requirements of our workforce be?
* What skills will the different roles need to have? (S*ome skills will be common across the organisation, some will be common across teams or functions, and some will be specific to individual roles)*
 |
| Type of employment  | * What types of employment do we need to have? Will they be paid or unpaid? Will they be part-time or full-time?
 |

##### Future Workforce Characteristics

|  |  |
| --- | --- |
| Gender | What is the gender distribution we want?  |
| Ethnicity | What will the ethnicity profile of our workforce be?  |
| Age  | What is the ideal age profile of our workforce? |
| Earnings  | What do we want the earning profile of our workforce to look like?  |
| Distribution  | Where will our workforce be located?  |
| Other employment characteristics  | What will some of the other employment characteristics of our staff be? * vacancy and recruitment activities, for example: vacancy lengths, recruitment rates, application numbers
* exit information (this may be sought through employee surveys, termination information, resignation letters)
* influences on staff (for example change in business direction, budgets, market pressures)
 |
| Workforce support  | How will staff be rewarded and recognised? What kind of support and development structures will be in place?  |
| Regional/national comparison | How will our workforce compare to similar businesses and organisations? How will we compare to the regional and national picture?  |

### Step 4: Gap analysis

##### Now that you have looked at your current and future workforce, compare the two to identify any gaps that may exist in the skills, capacity and capability of your workforce.

|  |  |  |  |
| --- | --- | --- | --- |
| Workforce needs | Describe the gaps between the current and future workforce state | Priority to address gap | What can you do to address the gaps?   |
| Types and number of roles |  |  |  |
| Skill and qualification level  |  |  |  |
| Type of employment  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Gender |  |  |  |
| Ethnicity |  |  |  |
| Age  |  |  |  |
| Earnings  |  |  |  |
| Distribution  |  |  |  |
| Other employment characteristics  |  |  |  |
| Workforce support  |  |  |  |
| Regional/national comparison |  |  |  |

### Step 4: Workforce development plan

Based on your analysis of the skills of your current workforce and the needs of your future workforce, what are the priority actions that you will need to take to develop your future workforce? Document the specific workforce development activities that you need to do in order to grow the capability, capacity and productivity of your workforce.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Priority workforce challenges identified | Actions | Desired outcome from action | Who | When |
| Planning  |
|  |  |  |  |  |
|  |  |  |  |  |
| Engagement and recruitment |
|  |  |  |  |  |
|  |  |  |  |  |
| Support, training and development |
|  |  |  |  |  |
|  |  |  |  |  |
| Reward, recognition and retention |
|  |  |  |  |  |
|  |  |  |  |  |
| Leadership and communication  |
|  |  |  |  |  |

### Step 4: Learning and development plan

You will now have identified a number of different workforce needs, including building up the capability of your existing and new staff to undertake the work you need them to do. Use this table to document your workforce training needs, to address the performance, competency and skill gaps you have identified.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| L+D Requirement | Reason(Why does the organisation need the training?) | Who | Timescale | Method | Provider | Cost |
|  |  |  |  |  |  |  |
| *Example: Health and safety training*  | *Legislative requirement*  | *All staff*  | *Next month*  | *On-job training*  | *Workplace training via Skills Active*  | *$200 + GST pp* |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |

### Step 5: Review and evaluation

It is important to regularly check back on the strategy you put in place to make sure what you are doing is working. Review your plan when there are significant changes, or at least once a year. By reflecting on your planning process you can use what you’ve learned to improve future workforce planning processes. The questions below are intended to help you capture the lessons learned.

 **P**

 **Yes No**

1. Do you feel like you know where your business is going, and what you need to do to get there? **10**
2. Do you have a clear understanding of the areas where you need to develop your workforce to meet your goals?

4. What would you do differently next time?

3. What was successful about your planning process?

5. What actions do you need to take forward to the next planning process?