#  Skills Active – Workforce Plan

# Comprehensive 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

# Comprehensive Templates

### Step 1: Business context and environment

Use this table to capture your business goals

|  |  |
| --- | --- |
| Organisation’s vision  |  |
| Business goals  |  |
| Customers  |  |

Use this table to capture your influences

|  |  |
| --- | --- |
| Political | Influences (current and future)  |
| Economic | Influences (current and future) |
| Sociological | Influences (current and future) |
| Technological | Influences (current and future) |
| Legal | Influences (current and future) |
| Environmental | Influences (current and future) |
| Organisational  | Influences (current and future) |

**Conclusions:** Have you identified any areas that may impact your workforce needs? (E.g. additional staff, new skills, new ways of working)

.................................................................................................................................................................................................................

...............................................................................................................................................................................................................

### Step 2: Current workforce profile – team and department level

Use this table to map your current workforce profile.

|  |
| --- |
| **MY CURRENT WORKFORCE PROFILE** |
| Staff ID/name | Position | Age | Date of birth | Gender | First start date | Level | Team / unit | Location | Employment status | FTE | Highest level qualification attained | Skills, knowledge and experience | Career intentions and aspirations |
| Permanent | Part Time | Fixed term | Volunteer |
| *Jo Blogs* | *Senior Administrator* | *58* | *3/1/1959* | *F* | *1990* | *3* | *Community programmes team* | *WGT*  |  | *X* |  |  | *0.8* | *NZ Certificate in Business Administration* | *25 years’ experience in sports administration, background in leisure activities, computer processing*  | *Aspiration to become Team Leader.* *Opportunity to transition to programme management role* |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

 **Analysis:** Does your workforce profile and analysis of workforce data identify any risk areas? (E.g. an ageing workforce, retention concerns, recruitment issues.)

For example consider:

* Analysis of workforce profile
* Analysis of mobility data (staff exits and reason for exits/progression); Turnover/attrition rates at difference levels
* Analaysis of qualitative information

### Step 2: Current workforce profile – regional/organisational level

Use this table to map your current workforce profile.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Classification by role/subject areas, or identify specific positions under job roles.  | Classification level  | # funded positions | # funded vacancies | # volunteer positions | # volunteer vacancies | Total FTE  | Average Demographics  | Employment status | Typical level/type of qualification attained | Typical skills, knowledge and experience | Career pathways/progression |
| Location | Gender split |  Age | start date | Career stage  | Permanent | Part Time | Fixed term | Casual  |
| *Team Coaches*  | ***1*** | *0* | *0* | *20* | *5* | *25* | *WGT* | *50% M* | *48* | *1998* | *E* | *0* | *25* | *0* | *0* | *Diploma in sport science*  | *3 years’ local team coaching*  | *Regional Development Coach* |
| *Sport Administrators*  | ***3*** | *0* | *0* | *5* | *0* | *5* | *WGT* | *60% F* | *19* | *2015* | *B* | *0* | *5* | *0* | *0* | *Entry level, no experience required* | *Entry level, employability skills, knowledge of X* | *Programme Assistant, Programme Manager* |
| *Regional Development Officer* | ***4*** | *0* | *0* | *0* | *1* | *1* | *WGT* | *100% M* | *33* | *2016* | *M* | *0* | *1* | *0* | *0* | *XYZ*  | *5 years’ experience in regional sport development*  | *National Development Lead* |
| ***Total***  | ***-*** | ***0*** | ***0*** | ***25*** | ***6*** | ***27*** |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Classification Levels: 1 = critical role; 3 = required role; 5 = optional role****Career stage classification B= beginning, M= mid-career, E= established**  |

**Analysis:** Does your workforce profile and analysis of workforce data identify any risk areas? (E.g. an ageing workforce, retention concerns, recruitment issues.)

For example consider:

* Analysis of workforce profile
* Analysis of mobility data (staff exits and reason for exits/progression); Turnover/attrition rates at difference levels
* Analaysis of qualitative information

### 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, new developments that will attract our required workforce demographic
 | Threats* What workforce issues may threaten our business, such as: workforce competition, skill shortages, regional demand, distribution challenges, recruitment and retention issues
 |

### Step 3: Future workforce requirements

Use this table to help you consider, identify and document what you think your workforce will need to look like in future.

|  |  |  |
| --- | --- | --- |
| What will my workforce be doing? | What is the capacity and capability needed to do this well? |  Who or where |
| CORE |  |  |
| *Assessing health and safety risks of activities* | *Health and safety awareness, assessment, management skills*  | *Everyone* |
| FUNCTIONAL |  |  |
| *Sport team training and development* *Administration and HR* *Event management and programme delivery*  | *Knowledge of applied learning theory for adults and/or youth*  | *Coaches/trainers* |
| JOB ROLE |  |  |
| *Coaches*  | *Minimum of 50 trained coaches at schools* *All coaches to have foundation coaching skills*  | *Across all regions* |

### Step 4: Workforce gaps

Use this table to help you consider, identify and document your workforce gaps and how you can address them. Refer to the information you collected in Step 3: Future workforce requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| Describe the workforce need. I.e. the capacity/capability needed   | What is the gap between the current and future workforces? And what are the workforce challenges associated with this gap?  | What is our priority in addressing this gaps  | What can we do to address these gaps? Consider the following categories: * Import resource (contractor/new staff)
* Export work (contract out functions)
* Build up skills within existing workforce
 |
| *Example Team: Two or more people need to be competent in health and safety awareness, assessment, management* | * *One person is trained in health and safety for the organisation, but is looking for new work opportunities.*
 | *Urgent – legislative requirement* | * *Provide additional health and safety training to staff.*
* *Contract in H&S management services*
* *Employ new staff with qualification*
 |
| *Example National Organisation: Need to increase number of skilled coaches to 25 nationally, to account for participant growth*  | * *Currently have 10 coaches in the Auckland/Northland area*
* *Not able retain existing coaches (3-year average term)*
* *Not all coaches have foundational coaching skills*
 | *Medium – supports medium-term growth*  | * *Recruitment drive/strategy developed*
* *Partnership with another organisation*
* *Develop coaching pathways for youth*
* *Implement coach training pathway to promote retention*
 |
|  |  |  |  |

### 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 to grow the capability, capacity and productivity of your workforce.

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

### Step 4: Learning and development plan

There will be a number of different workforce needs that you have identified including the need to focus on the capability of your existing and new staff to undertake the work you need them to do. Use this table to help you 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* |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

### Step 4: Learning and development plan – for individuals

Use this table to help you identify and document individual learning and development needs of staff:

Tip: Document the skills you need in the short-to-medium term to excel at your current role and in the medium-to-long term to drive your career growth. Try to list these in order of importance for you and keep it to under 10 skills. When looking at what skills to put down, consider your job role and business goals as well as your career growth aspirations and what you will need to be able to meet these goals.

We engage in learning in many different ways. One common model for looking at learning and development splits your learning and development activities between a combination of learning from doing (70%), formal learning (10%) and learning from others (20%). This model supports a simple and equitable development framework that makes you the architect for your own career.

**Learning by doing (70%)** includes things like: challenging job opportunities, experience, project work

**Learning from others (20%)** includes things like: mentoring, coaching, identifying role models, networking

**Formal learning (10%)** includes things like:workshops and seminars, qualification and training, continuing professional development

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Skills  | For my Job? | For my Career growth?  | Confidence in my skill (L-M-H)  | What does great look like  | Learning Plan  | Learning Type (70/20/10) |
| *Leadership (example)* | *Y* | *Y* | *M* | *People that know me recognise and respect me as a leader. This includes my manager, peers and people within the industry I work.*  | * *Get appointed to a leadership role on a virtual project team this year*
* *Identify and engage a mentor to support me in my leadership project*
* *Undertake a foundational leadership course through online provider*
 | * *Learning by doing (experience)*
* *Learning from others (mentoring)*
* *Formal learning (external CPD)*
 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

### 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?

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

3. What was successful about your planning process?