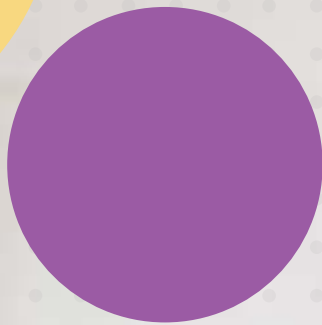


Workforce Planning Connect Toolkit Workbook

FOR THE DISABILITY SECTOR





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About this workbook

This workbook has been designed to help you put the Workforce Planning Connect Toolkit into action.

Whether you're looking to learn new processes or become more systematic in your workforce planning, use the workbook to implement one, four or all the workforce planning activities.

Starting out? If workforce planning is new to you or your organisation, perhaps start small and focus on one or two activities for your first round of planning.

Experienced in workforce planning? If you have already undertaken comprehensive workforce planning, perhaps use this Toolkit to help improve your processes or try a new method.

HOW IS IT DONE? There are four main stages to workforce planning.

Four key stages of workforce planning



1. GET STARTED

- Understand what workforce planning is and why it is important to your business
- Determine what you want from the process
- Consider who should be involved and what information you will need



2. GATHER INFORMATION

- Analyse your current workforce
- Consider your future workforce needs



3. IDENTIFY ISSUES AND FIND SOLUTIONS

- Identify where there are workforce gaps and issues
- Develop strategies and solutions to address them



4. DEVELOP, IMPLEMENT AND MONITOR

- Document and implement your workforce plan
- Monitor progress against the plan and review the plan as needed

Stage 1 - Get started

For this stage of the workbook you will start by getting clear about how workforce planning is going to help your organisation to better meet its goals and deliver services into the future.

Workforce planning activities and tools to complete in this stage of the workbook are:

- **Activity 1** - Determining your workforce planning purpose
- **Activity 2** - Identifying inputs to your workforce plan
- **Activity 3** - Identifying who should be involved

Stage 2 - Gather information

In this stage of the workbook you will be gathering data to provide a picture of your current workforce and any trends that will determine your future workforce required to deliver your organisation's goals and meet demand for services.

Workforce planning activities and tools to complete in this stage of the workbook are:

- Analysing Workforce Supply
- Simple Training Needs Analysis
- Calculating Workforce turnover (excel)
- **Activity 4** - Calculating workforce supply and demand

Stage 3 - Identify issues and find solutions

For this stage of the workbook you will start to compare your current workforce with your future workforce needs in order to identify where you are likely to have workforce gaps and develop solutions and actions for filling those gaps.

Workforce planning activities and tools to complete in this stage of the workbook are:

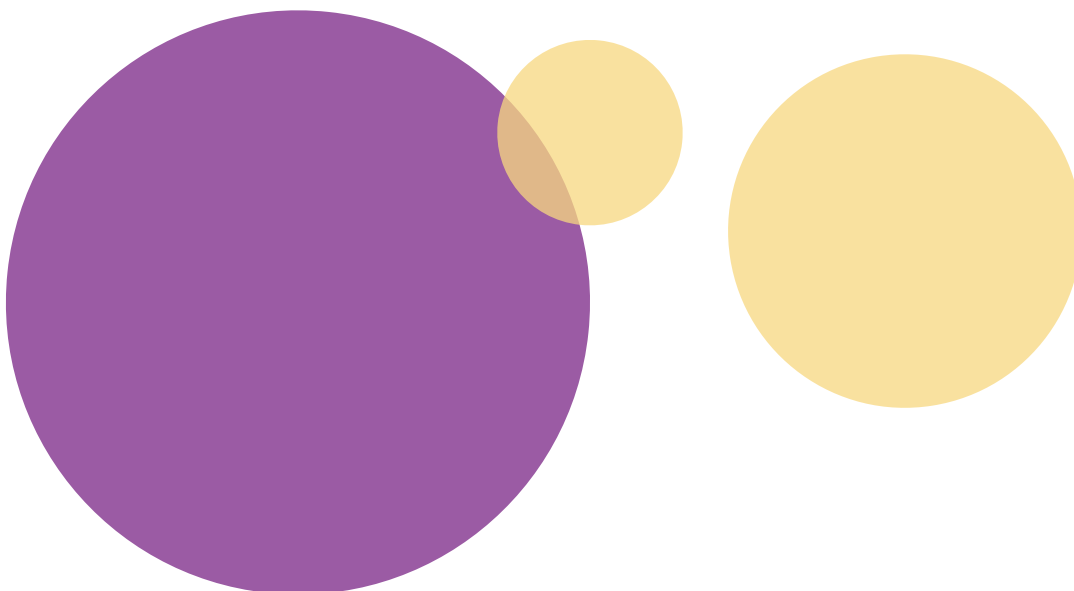
- Conducting Workforce gap analysis
- Simple Training Needs Analysis
- Workforce Action Plan

Stage 4 - Develop, implement and monitor

In the final stage of your workforce planning journey you will document your identified actions in a workforce plan to be able to share this with relevant people in your organisation and commence implementation of the plan.

Workforce planning activities and tools to complete in this stage of the workbook are:

- Workforce Plan





STAGE 1

GET
STARTED



DETERMINE WHAT YOU WANT FROM THE PLANNING PROCESS

Undertaking workforce planning for the first time can feel like a daunting process, but it doesn't have to be. All organisations will already be doing at least some elements of workforce planning – for example, determining how many new support workers you will need to support a new participant, or identifying the training needs of staff to fill skill gaps, or monitoring the retirement intentions of key staff members. It is simply a case of being systematic about these activities so that you can identify and plan your workforce needs in advance.

Start by determining what you want to achieve from the workforce planning process. If this is the first time you have done a workforce plan, then you might want to keep this very simple.



Activity 1 - Determining your workforce planning purpose

Your answers to the questions below will help you to identify the purpose and scope of your workforce plan.

1. Is there a particular strategic direction or directions your organisation is wanting to pursue?
(e.g. participant growth, or a new area of service delivery)

2. Are there any external factors (e.g. policy changes, labour market trends) likely to impact your future workforce?

3. Are there any budget/financial constraints affecting your current workforce or likely to affect your future workforce?

4. Are there any particular workforce issues you are trying to resolve or understand?
(e.g. employee turnover, or an ageing workforce)

5. Do your answers to the questions above suggest that you need to focus on the whole of your workforce, or just certain sections?

6. Do your answers to the questions above suggest any time period to focus on for your workforce plan?

Based on your previous answers, complete the following:

The purpose/s of this workforce plan is:

It will focus on:

It will be for the time period of:

IDENTIFY WHAT INPUTS YOU WILL NEED

There are a variety of inputs involved in workforce planning. Exactly which ones you will need will depend on your purpose for workforce planning. It will also depend on what information you have available in your organisation.

Below are typical kinds of information and data used in workforce planning.



Activity 2 - Identifying inputs to your workforce plan

Use the table below to document your initial thoughts about the inputs you will need to develop your workforce plan. We'll examine some of this information/data sources in more detail in Stage 2 of the process.

Current workforce		
What do I need to know about our current workforce?	What data/information will give me the answers?	Do I have access to this data/information?
<i>e.g. How many support workers are needed on average to support each participant?</i>	<i>Current support worker numbers Hours worked by support workers Participant numbers and hours of support</i>	<i>Yes - from HR records Yes - from payroll records Maybe - would need to collate this from service records</i>
<i>e.g. How many staff are likely to retire in the next three years? changes, labour market trends likely to impact your future workforce?</i>	<i>Staff ages Typical retirement age Intentions to retire</i>	<i>Yes - from HR records Maybe – would need to look at Government legislation and analyse past HR data No - need to ask frontline managers about whether this can be gathered from employee performance reviews</i>

Future workforce		
What do I need to know about our potential future workforce?	What data/information will give me the answers?	Do I have access to this data/information?
<i>e.g. Can we afford to employ more staff?</i>	<i>Staffing costs and allocations</i>	<i>Yes - from budgets and financial projections</i>
<i>e.g. How many new participants are we likely to take on and with what types of support needs?</i>	<i>Analysis of demand projections</i>	<i>Maybe - would need to analyse NDIS market data and Boosting the Local Care Workforce demand maps</i>

IDENTIFY WHO NEEDS TO BE INVOLVED

The next step is to consider who should be involved in workforce planning for your organisation.

At a minimum, you will need to have commitment and support from the senior managers/leaders of the organisation to ensure that there is alignment between the workforce plan and the direction of the organisation. There may also be others that you would like to involve in the design, implementation, monitoring or review of your workforce plan.



Activity 3 - Identifying who should be involved

The following questions can help with determining who should be involved in your workplace planning process.

1. How much time can your organisation dedicate to the planning process?

2. Are there any managers or leaders who should be involved so that decisions can be made?
In what ways and at what stages do I need their involvement?

3. Do I need other people with particular types of expertise to be involved in the workforce planning process? In what ways and at what stages do I need their involvement?

4. Are there representatives of other stakeholder groups that should be involved in the process?
(e.g. people with lived experience of disability, key project partners, board members, funders).
In what ways and at what stages do I need their involvement?

You might like to use the table below to summarise your responses to the previous questions.

Who should be involved		
Who needs to be involved?	What will be the nature of their involvement?	Which stages will they need to be involved in?
e.g. HR Manager	Provide key data to inform plan and monitoring of implementation	Significant involvement in the 'gather information' stage. Ongoing involvement in 'monitoring and review'
Person who recruits in your organisation e.g. Team Leader	Involved in recruitment process, training and induction and ongoing supervision Manage process, consider external parties assisting with recruitment and interviews. For small organisations you might also like to consider inviting external people to be part of the recruitment process	Works closely with individuals, from on boarding to day-to-day management Manage process and works closely with individuals, from on boarding to day-to-day management

Notes



STAGE 2

GATHER INFORMATION



ANALYSE YOUR CURRENT WORKFORCE

The current state of your workforce can be referred to as workforce supply. To create a picture of workforce supply you will need to collect and analyse workforce data. Your analysis should use the most recent data available, as well as historical workforce data if you have it available. While there is not a set period for workforce history collection, data should cover the previous 12 months as a minimum.

It is possible that some of the workforce data is not available at the commencement of the workforce planning process. Where data is missing, the use of anecdotal information or assumptions should be considered. Both are viable alternatives and, if used, should be documented.

In this section we will run through some of the most common sources of data/information in more detail and show you how to calculate some of the measures you might need for analysing your current workforce.



Analysing Workforce Supply

This template can help you with documenting this data and includes prepopulated formulas to assist with calculations. This can be accessed [HERE³](#) and is also located on the WorkAbility Qld website.



Simple Training Needs Analysis

This template allows you to document the skills and capabilities required for either individual employees, or particular job roles and to identify where training and development of existing employees might help to fill gaps. This can also be accessed [HERE⁸](#) and is available on the WorkAbility Qld website.

Calculating workforce turnover

Instructions	Example
<p>Calculate the average number of employees</p> <ol style="list-style-type: none"> Add the number of employees at the beginning of the period (at the beginning of a calendar or financial year) to the number at the end of the period divide this figure by 2 	<ol style="list-style-type: none"> Number of employees at the beginning of the year = 31 Number of employees at the end of the year = 33 Average number of employees: $(31 + 33) \div 2 = 32$
<p>Calculate the turnover rate</p> <ol style="list-style-type: none"> Divide the number of people who left during the period by the average number of employees calculated above Multiply this figure by 100 	<ol style="list-style-type: none"> Number of employees who left during the period = 8 $[8 \div 32]$ Turnover rate: $8 \div 32 \times 100 = 25\%$



Calculating Workforce Turnover

An excel template inclusive of prepopulated formulas can be accessed [HERE⁶](#) and is on the WorkAbility Qld website.



Activity 4 - Calculating workforce supply and demand

1. Based on the inputs you explored in Activity 2 and the descriptions of different ways of calculating elements of workforce supply and demand, list the data that you are going to collect and analyse.

Element of workforce supply	What data do I have available?	How will I analyse it?
<i>e.g. Workforce turnover</i>	<i>Data from HR on employee numbers and resignations for the last five years</i>	<i>Analyse the data by role and location using the workforce turnover template</i>

2. Collect and analyse the data, using the various templates included in this toolkit to help you.

Element of workforce demand	What data do I have available?	How will I analyse it?
<i>e.g. Participant demand projection</i>	<ul style="list-style-type: none"> - Strategic plan - Boosting the Local Care Workforce - NDIS Demand Map data - NDIS Market Monitoring data 	<ul style="list-style-type: none"> - Download the relevant data for each delivery location - Discuss data with workforce planning team in conjunction with our strategic plan and agree upon targets

Notes



STAGE 3

IDENTIFY ISSUES AND FIND SOLUTIONS



This stage is the culmination of the workforce planning process. It brings together the data collection and analysis, insights and directions from the previous stages of workforce planning.

Now that you have gathered your workforce supply and demand data, you can compare this information to gain an understanding of the likely gaps and issues for your organisation's workforce. This process is commonly referred to as a gap analysis.

You can then develop strategies and actions to address these gaps and issues. This process of analysis and development of solutions can be considered in terms of:

- gaps and issues common across the whole organisation
- gaps and issues unique to a specific part of the organisation.



Workforce gap analysis

An excel template for conducting workforce gap analysis assists to predict resignations, end of contract and future planned numbers of workers inclusive of prepopulated formulas can be accessed [HERE⁷](#) and is on the WorkAbility Qld website.



Simple Training Needs Analysis

This template allows you to document the skills and capabilities required for either individual employees, or particular job roles and to identify where training and development of existing employees might help to fill gaps. This can also be accessed [HERE⁸](#) and is available on the WorkAbility Qld website.



Workforce Action Plan

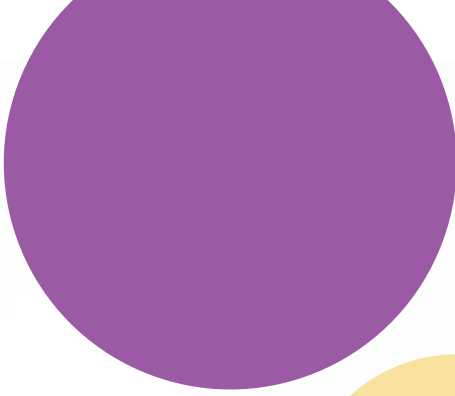
The following questions can help with determining who should be involved in your workplace planning process.

Organisation name: _____

Date: _____

Identified issue/gap	Strategy	Tasks	Additional Resources	Performance measure	Responsibility	Timeframe
High staff turnover amongst casual employees	<ul style="list-style-type: none">Redesign rostering system to provide greater regularity in scheduling of shifts	<ul style="list-style-type: none">Research and acquire new rostering systemTrain staff in new system	<ul style="list-style-type: none">New rostering software	<ul style="list-style-type: none">Reduce staff turnover amongst casual employees by 10%	Rostering manager	By end December 2022

Notes



STAGE 4

DEVELOP,
IMPLEMENT
AND
MONITOR



Workforce Plan

The table below shows the typical elements of a workforce plan and the sections of this workbook that can help you with each element.

Organisation name: _____

Time Period: _____

1. Introduction and strategic drivers

Overview of your organisation and any organisation, financial and environmental factors underpinning your workforce plan - as identified in Activity 1

2. Workforce planning purpose

The purpose of your workforce planning process - as identified in Activity 1

3. Workforce supply

A summary of the key findings of your analysis of workforce supply

4. Workforce demand

A summary of the key findings of your projections of workforce demand

5. Workforce gaps and issues

A summary of the gaps and issues identified through your gap analysis

6. Key risks

A list of the most significant workforce risks identified through your risk analysis

7. Strategies

List of strategies for addressing highest priority gaps and issues (Include detailed action plan as an attachment)

8. Monitoring and review

Details of your plan for monitoring implementation of the workforce plan. Details of review processes and timelines

Notes

Notes



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www.workabilityqld.org.au | info@workabilityqld.org.au

