

Workforce Planning Connect

Right Skills. Right Time.

A workforce planning toolkit
for the aged care sector



Ageing
Australia

DELIVERING
FOR QUEENSLAND



Queensland
Government

FURTHER ENQUIRIES

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Welcome

Workforce Planning Connect is a suite of materials designed to support employers, industries and regions to access the skills and workforce they need.

Jobs Queensland, in collaboration with Ageing Australia, has developed this workforce planning toolkit for aged care providers in Queensland. It is designed to help Queensland aged care providers to:

- understand the benefits and advantages of workforce planning
- build knowledge and understanding of workforce planning
- grow capability and skills in workforce planning.

The toolkit provides practical tips and tools on how to develop and implement a workforce plan for your organisation so you are better positioned to respond to your workforce needs, now and into the future.

It can be used by people who have never undertaken workforce planning before, as well as those who may have done some workforce planning previously.

To find out more, visit the Workforce Planning Connect website at www.jobsqueensland.qld.gov.au/wpc

Introduction

Industries today are constantly changing, which is likely to have some impact on your organisation. New technologies, changes in the economy and access to capital are just some areas of change and uncertainty. Change can mean growth or decline in markets and your client base, and an increase in competition.

Many organisations use workforce planning to help think ahead and manage change. Workforce planning can help organisations to better compete for employees and skills, now and into the future. This is especially important during times of change.

Workforce planning, when done effectively, can deliver many benefits and positive outcomes.

Most organisations, whether they are actively planning or not, are already doing some elements of workforce planning as part of their regular business operations.

You may find this includes developing new skills in your workforce or needing to recruit new employees to meet increased production demands. Having a systematic approach to collecting and analysing your workforce data means that you can make informed decisions based on actual workforce performance.

When you have worked through the stages and resources contained within this toolkit, you will have a detailed workforce plan for your organisation, as well as a one-page summary of your workforce actions.

No matter where you are on your workforce planning journey, you can use this toolkit in a way that best meets the needs of you and your organisation.

STARTING OUT

For those who are new to workforce planning, you may like to work your way through each of the stages in this toolkit in order. This way, you can familiarise yourself with the process and then focus on the aspects most important to you (e.g. retaining your existing workforce).

ALREADY ON THE WORKFORCE PLANNING JOURNEY?

If you already have experience with workforce planning, you may like to use the toolkit and resources to improve your existing processes or to update the relevant stages.

This toolkit includes:



TOOLKIT RESOURCES

Toolkit resources are a range of documents that you can use to develop your workforce plan. They can provide additional information, assist your preparations or develop your plan.



KEY ACTIVITIES

The key activities for each section of the toolkit are outlined at the beginning of that section.



CONSIDERATIONS

Throughout the toolkit are questions to consider. These questions act to guide your thinking and inform your actions.



SCENARIOS

The scenarios within the toolkit have been developed by your industry and reflect typical events an Aged Care organisation may face.



SUGGESTIONS

Suggestions act as prompts to assist your thinking and actions as you develop your workforce plan.



CHECKLISTS

At the completion of each section, you will find a checklist. These checklists are designed for you to check your understanding of the material within that section.

How to use this toolkit

The toolkit is structured to step you through the workforce planning process. It will follow these four key stages:

- 1. Get started**
- 2. Gather information**
- 3. Identify issues and find solutions**
- 4. Develop, implement and monitor.**

The framework on the next page identifies the information and resources that can be adapted to your organisation. You can use the steps outlined in this toolkit to develop a complete workforce plan or to address a specific workforce challenge, opportunity or need in your organisation.

FOUR KEY STAGES

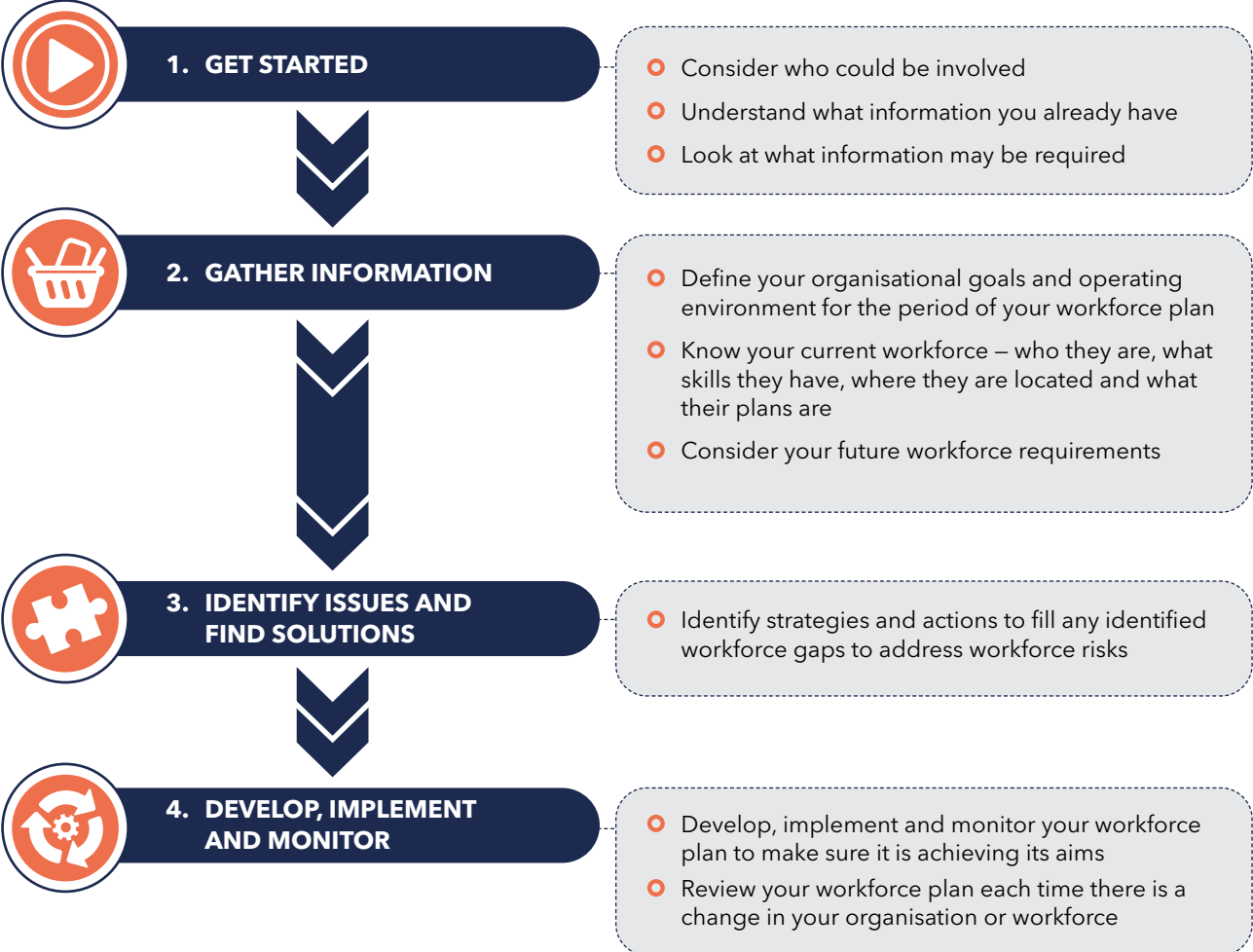



Figure 1: Workforce planning stages

 **TOOLKIT RESOURCE**
FACT SHEET 1: Workforce planning: A summary guide
This fact sheet provides an overview of the four stages of workforce planning.

What is workforce planning?

Workforce planning is about having the right people, at the right time and place, doing the right things to achieve your organisational goals. It's about linking your people, to your organisation's purpose. Similar to business planning, it is a continuous process of identifying the existing skills of your workforce (where you are now), desired future skills (where you are going), workforce gaps, and strategies and actions to close those gaps (how you will get there). These strategies and actions can include training and development, recruitment and improving workforce performance.

The purpose of workforce planning is not to decide what you will do in the future, it is about determining what you can do now to be best prepared for the future.

Workforce planning can help your organisation be more resilient to economic, environmental, social and technological change.

These goals can range from growing your organisation, to just simply wanting to achieve another successful year of operation. Along with your business plan, your workforce plan will get you and your workforce ready to respond to any changes in your organisational environment. Your workforce plan should be regularly reviewed as changes and challenges occur within your organisation.

What does workforce planning involve?

Workforce planning is about planning for the people who will help your organisation deliver services to your clients. There are four dimensions to workforce planning:

- **Who:** securing, fostering and retaining the right **people**
- **What:** identifying the right **skills**, training and development required
- **Where:** aligning people to the right **roles** and responsibilities
- **When:** ensuring that these components come together at the right **time**.

There are different levels of workforce planning:



Operational

Focus of <1 year



Tactical

Focus of 1-2 years



Strategic

Focus of >2 years

Benefits of workforce planning

A good workforce plan will give you a solid understanding of your current workforce and how to prepare your workforce for the future.

Aged care providers often rely on the knowledge and skills of a small number of employees. The departure of any one of these employees (through resignation or retirement) can be costly and result in the loss of important organisational knowledge. New opportunities can also emerge for your organisation that require your workforce to change.

Workforce planning can help your organisation to better compete for employees and skills. This is especially important during times of change.

Workforce planning that is integrated with business planning (see Figure 2) can help your organisation to:

- respond quickly and strategically to change, as managers can recognise emerging challenges in the market, workforce and organisation
- link your workforce initiatives to your finance and business planning to ensure they are aligned to plans and budgets
- improve efficiency, effectiveness and productivity (your workforce possesses the right skills and are a good fit for the job)

- identify where you are most at risk of productivity and continuity losses, and where you need to train employees to ensure you have a consistent supply of talent
- plan for future workforce requirements (identify staffing needs in a timely manner, monitor turnover and ensure replacement staff are available to fill key vacancies)
- identify whether or not you need to improve your retention strategies. If key skilled people are regularly leaving, how you can prevent this from continuing to occur?
- engage your workforce, increase job satisfaction and foster goodwill through improved employee relations
- build workforce skills to support business activities and achieve organisational goals
- plan for new and emerging skills or roles through specific recruitment, training activities or collaborating with other organisations
- know who is in your workforce, what they do, the skills they have and the skills they need to develop or improve.

Your workforce plan should be regularly reviewed to ensure your organisation is well positioned to achieve its goals. You can update it as often as you like, though especially when there are key changes happening in your organisation.

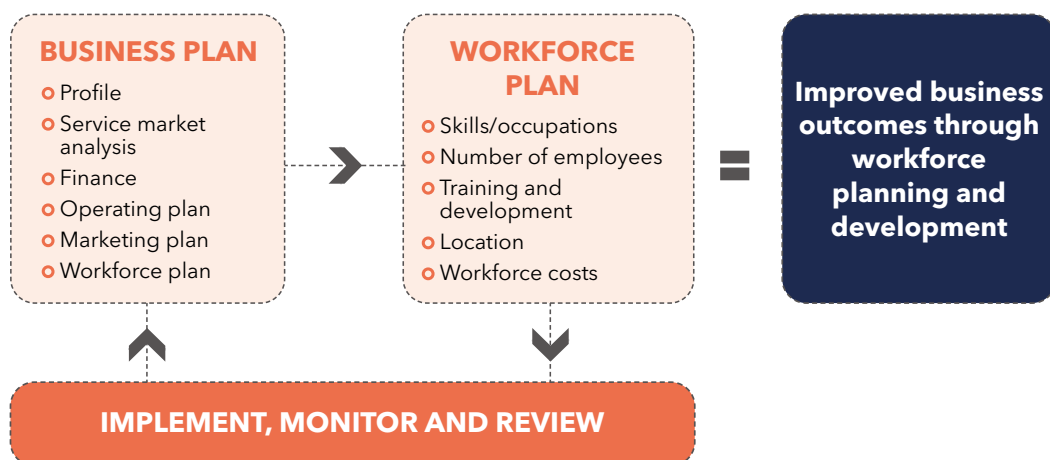


Figure 2: Integrated business planning



STAGE 1

GET STARTED





KEY ACTIVITIES IN THIS SECTION

1. Consider who should be involved
2. Understand what information you already have
3. Look at what information may be required

Where do I start?

Undertaking workforce planning for the first time can feel like a daunting process. It doesn't have to be. In fact, instinctively you may already be undertaking some workforce planning activities, such as developing new skills or recruiting additional employees.

Workforce planning is a more systematic approach that can be successful in organisations of any size. It does not need to be complicated; however, it does require thought and engagement with your staff.



THINGS TO CONSIDER

- What is your current business strategy? The strategy of an organisation will provide guidance on its key functions and activities, including services to be delivered. This will be very important in developing your workforce plan as it will provide insights into your organisational goals.
- Who will be doing this? Will this be the organisations owner, a manager or an external person?
- What do you consider is your current workforce? Is it only your direct employees (i.e. people for whom you pay superannuation, deduct tax etc.)? Or does it include people who are engaged through a third party or provide services to your organisation?
- Regardless of the size of your workforce, segmenting your workforce into different types of roles, functions and skills will help you best understand and focus on the most important workforce aspects of your organisation.
- What workforce information do you already have?
- What workforce information can you collect relatively easily?
- What is the best way to communicate to your workforce and stakeholders?



To help guide you through this toolkit, examples are provided using a fictional business.

ROSELAND AGED CARE SERVICE

The organisation is a small family-owned and operated aged care facility that has experienced growth over the past 25 years. The workforce now consists of:

- **Darren:** Business owner
- **Amina:** Business owner/administration manager

20 employees (full-time) including:

- **Samir Farid:** Facility manager (20 years service)
 - **Christos Georgiou:** Personal care worker (2 years service)
 - Variety of clinical staff such as registered and enrolled nurses and administrative staff.
- There are currently three scenarios to consider:

1. Decline or maintain: Succession planning

Darren and Amina are in their 60s. They would like to scale back their involvement in the business with the view of passing it on to a family member or selling it within the next 5 years. Darren and Amina have three children, all of whom have professional careers that are not currently related to the organisation.

2. Diversify: Expand into new markets

Darren and Amina's youngest son Tony has recently returned from working and travelling abroad. He has some ideas to diversify the aged care provider.

3. Grow: Expand the aged care service offering

Darren and Amina are contemplating expanding their aged care service offering to include palliative care. This would enable them to meet growing community demand and attract a wider range of clients. They will need to recruit qualified staff and refine their care planning processes.

All three scenarios require workforce planning to support the business plan for the future and the workforce they employ.

Who should be involved?

It is important that you consider who should be involved in workforce planning for your organisation. Your workforce planning team is a core group who will be involved in the design, implementation, monitoring and evaluation of your workforce plan.

It is important to have commitment and support from these key people to ensure that there is alignment between the workforce plan and the organisational direction. It is beneficial to include

any clinical staff, team leaders and managers to capture their knowledge and input where possible.

Clearly define roles and responsibilities for workforce planning activities and set realistic deadlines. **Template 1** will assist in this process.

When discussing the workforce plan, clarify how you are going to reach your end goal, as well as who is committed to making this goal happen.



THINGS TO CONSIDER

- Who are you going to involve in this process, based on the scope and scale of your workforce planning?
- What is their role in relation to workforce planning? Who are the key decision-makers?
- How can they be best involved and what time can they commit?



SUGGESTIONS ON WHO SHOULD BE INVOLVED

Small organisations	Medium-sized organisations
May only have two people involved in the running of the organisation and the management of staffing	A diverse mix of management and employees who represent various organisational levels, functional areas and locations
In some organisations, all staff may also be family members	Managers or team leads who oversee areas with critical hiring needs
Dedicated and knowledgeable staff	Staff, including both new hires and those employees with more experience
	Dedicated and knowledgeable staff
	A mix of age (including youth and mature age), gender, cultural background and declared disability
	Staff with specific expertise needed to implement the workforce plan (e.g. HR, IT, Finance)
	Employee representatives



TOOLKIT RESOURCE

TEMPLATE 1: Who should be involved? Stakeholder planning

This template will assist you to identify who you should include in your workforce planning activities.

Successful workforce planning – you can do it

Successful workforce planning outcomes can be achieved through a simple process, and with limited experience, resources and data, or workforce planning capability.



THE PROCESS IS THE SAME FOR ANY SIZE ORGANISATION IN ANY INDUSTRY

The process of workforce planning is relevant to any organisation of any size. Support for workforce planning is available to aged care providers from a range of organisations: industry bodies, education and training providers, regional development boards or through government resources.



START WITH THE END IN MIND

Be clear about what you are trying to achieve by undertaking workforce planning. Clearly articulating the outcome can help you identify a tailored process that aligns with timeframes and capability levels. Additionally, when evidence-based workforce planning is undertaken, the information gathered can be used to qualify and quantify the outcomes the organisation is seeking. Collectively, these provide a benchmark to review, assess and amend strategies and actions for future success.



ENGAGEMENT OF KEY STAKEHOLDERS IS CRITICAL

The value of engagement with key stakeholders cannot be underestimated, particularly when introducing workforce planning into your organisation. Key stakeholders can include your facility manager, employees and employee representative groups, such as unions. The implementation of workforce strategies and actions is most effective if all stakeholders are engaged in the process, particularly those employees who will be affected.



WORKFORCE PLANNING CAN BE SUCCESSFUL WITHOUT BEING COMPLICATED

Consider the capacity and capability in your organisation to implement workforce planning. Identify where external support can be sourced locally within your industry or the region in which you are located.



DATA COLLECTION DOES NOT HAVE TO BE COMPLEX

Workforce planning can be effective without sophisticated metrics or HR systems. Managers generally have the answers to workforce planning but can struggle to articulate what is required. Asking the right questions will enable you to draw out from managers the information that is being sought. If you currently have limited workforce data, you can commence collecting new data that will increase your available workforce information over time.



INCORPORATE WORKFORCE PLANNING INTO YOUR NORMAL BUSINESS PLANNING PROCESS

Workforce planning works best when it is integrated with your normal business planning processes. Organisations that align strategic, business and workforce plans are better placed to identify current and future workforce requirements. Aligning these will ensure the workforce plan is future focused and incorporates prioritised outcomes within budget constraints. It also provides an opportunity to review the relevance and currency of the workforce plan in line with organisation or industry changes. This creates a workforce planning environment that is continuous and not static.



WORKFORCE PLANNING SUPPORTS THE RIGHT WORKFORCE DEVELOPMENT INITIATIVES

Workforce planning supports an evidence base for decisions about workforce requirements, in particular workforce development strategies. It is a way of managing workforce risk. Workforce development can include recruitment and retention strategies, building capability through learning and development, job redesign, and strategies to diversify the workforce.



WORKFORCE PLANNING CAN IDENTIFY RISKS TO THE ORGANISATION

A key consideration of workforce planning is to identify and understand workforce risks and the potential impacts on the organisation. Being able to identify workforce risks effectively allows for risks to be managed and mitigated through appropriate workforce strategies to lessen potential negative consequences for the organisation.



A WORKFORCE PLAN IS NOT A STATIC DOCUMENT

It should be a live, active process supported with regular workforce insights and annual reviews in alignment with your normal business planning activities.



STAGE 1 CHECKLIST

I understand:

- what workforce planning is (refer to **Fact sheet 1: Workforce planning: A summary guide**)
- why workforce planning is important to the aged care sector
- who I should include when undertaking workforce planning (refer to **Template 1: Who should be involved? Stakeholder planning**).



STAGE 2

GATHER INFORMATION





KEY ACTIVITIES IN THIS SECTION

1. Review and understand your organisational goals
2. Review the profile of your current workforce
3. Identify where you might want to be in the future
4. Identify your workforce gaps

Introduction

Workforce data collection does not have to be complex, and workforce planning can be successful with limited data. Consultation with managers and your workforce can be just as effective as collecting data from the system, if not more effective.

When gathering the information needed for workforce planning, you will need to consider the quality and reliability of your workforce information systems. Much of this can be found in the payroll system, though you will need to consider the quality and reliability of that information to inform decisions on your workforce plan.

If you are lacking confidence in your current workforce data, develop a plan to increase the accuracy and integrity of these for the future.

Undertaking a self-assessment can assist you in identifying what information you already have, what information you can easily source and who you can potentially source it from. It can also assist you to identify future sources of information that you can use when reviewing your workforce plan.



TOOLKIT RESOURCE

SELF-ASSESSMENT TOOL: Workforce planning inventory: Am I ready?

This document can assist you in determining whether you are ready to commence workforce planning in your organisation.

What are your organisational goals?

Workforce planning is about your workforce - the people who will deliver your services to your clients.

To ensure you are best positioned to have the right people, right skills, right numbers, at the right time

and place, doing the right things, you need to be clear about your organisational goals.

Capturing this information upfront (**Template 2**) helps to articulate the linkage between your organisation and workforce requirements.



THINGS TO CONSIDER

- What are the services that your organisation provides?
- What are your organisational goals over the relevant time period (e.g. 12 months)?
- What are the key challenges in achieving these goals?
- What are the skills that the workforce needs to deliver these services so that your organisational goals are achieved?



TOOLKIT RESOURCE

TEMPLATE 2: Knowing your organisation and workforce

This template will help you understand your business direction and workforce considerations.

What does your workforce look like now?

The current state of your workforce can be referred to as workforce supply and can be shown through workforce data. The analysis should use the most recent information available, although historical workforce data is also helpful. 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 workforce data is not available at the commencement of the workforce planning process.

Where information is missing, the use of anecdotal information or assumptions should be considered. Both are viable alternatives and, if used, should be documented. It is also advisable to think about how to start capturing this new information for future use as well.

Template 3 can be used to capture this information.

Key workforce supply data that you may already collect or should be reasonably easy to collate:

? How many staff do you have?

Permanent

- Full-time
- Part-time (full-time equivalent, e.g. 0.6)

Temporary

- Casual
- Contract
- Other (e.g. recruitment agency)

? What are their key skills/occupations?

- Skills/current capabilities
- Qualifications

? What are your workforce segments?

- Role/job family
- Employment status
- Department

? What is your turnover rate?

- Resignations (anticipated turnover based on previous resignation rate)
- Retirements (workers approaching 60+ years)

? What are your current work practice arrangements?

- Fixed hours of work
- Shift work
- Flexible
- Leave (annual/sick/other)
 - How are these absences managed?

? What is the demographic profile of your workforce?

- Occupation/position
- Location (if your organisation has more than one location)
- Length of service
- Diversity statistics
 - Gender
 - Age profile (including youth and mature age)
 - Cultural background
 - Declared disability

? What is the current workforce cost?

- Fixed costs (e.g. wages/salary, including superannuation, leave loading)
 - Overhead costs
 - Variable costs (e.g. training)

The presentation of workforce data should occur in a way that allows for analysis of the information. Different ways to present this can include graphs to show how information changes over time (e.g. workforce size, workforce age profile,

turnover trends). This information is important as it provides your organisation with a clear view of its current position and a baseline for your future workforce analysis.



TOOLKIT RESOURCE

TEMPLATE 3: Current workforce data and profile

This template is to capture the key data of your current workforce.

FACT SHEET 2: Calculating your workforce turnover

This fact sheet will show you how to calculate workforce turnover.

What does your future workforce need to look like?

Understanding your future workforce needs is about estimating the number of employees and types of skills and occupations required to deliver on your business strategy and goals.

The workforce planning process that aims to identify your future workforce is referred to as *demand forecasting*. The workforce demand forecasting process is designed to answer the following key questions in relation to the business plan timeframe.



THINGS TO CONSIDER

- How many jobs will be required for the future?
- What are the skills required for the future?
- What number of people will be required for each role?
- What roles will be hard to fill, central to service delivery capability and can take a long lead-in time to build the required skills?

KEY WORKFORCE DEMAND DATA THAT YOU MAY ALREADY COLLECT OR THAT SHOULD BE REASONABLY EASY TO COLLECT



What factors will drive your future workforce needs? One or more of these scenarios will fit your business plan.

Organisational growth – increase in demand for services

- What skills/occupations will be needed? Are these needed for a defined period or will they be ongoing?
- When will these skills/occupations be needed? Continuous need or requirement to cover peaks and troughs (e.g. leave)?
- What locations will they be needed in?
- How many of these skills/occupations will be required?

Maintaining current organisation size and operations

- Which skills/occupations will be needed?
- Will there be any changes to these skills/occupations?

Organisation downsizing or shift into new areas – a decrease in a service

- Which skills/occupations will be affected?
- What is the timing of the impact?
- How many employees will be affected?
- What locations will this occur at?



What skills and capabilities will be required?

Changed skills

- What is the level of impact on affected roles?
- Can you train existing staff?
- Do you need to recruit new staff?
Permanent [full-time/part-time]
Temporary [casual/contract/other, recruitment agency]

Maintaining existing skills and capabilities

- Will this level increase, decrease or remain stable?

New ways of working required (e.g. introduction of new technology)

- Is this across the whole organisation?
- Is there a specific role affected?

What are the volumes and timing of these impacts?

What is the availability of these skills/occupations in the existing and external workforces?

(Note that this can be influenced by differing geographical locations.)

- Are they difficult to find?
- Are you expecting that they will be harder to find?
- Are they readily available?
- Will the cost of these new skills be competitive?

What are the expected workforce costs?

- Fixed costs (e.g. wages/salary, including superannuation, leave loading)
- Overhead costs
- Variable costs (e.g. training)

After considering your future workforce requirements, you will now have your future workforce demand data. This information can be presented in graphical ways that will allow your organisation to have a clear view of its future workforce needs.

Now you can match your workforce supply data to your demand data and, in doing so, identify your workforce gaps. Using **Template 4** will assist in this activity.



TOOLKIT RESOURCE

TEMPLATE 4: Workforce supply, future demand and gap analysis

This template considers your current workforce supply against future demand and the resulting gap.

There are two main types of gaps:

1. **Workforce gap:** the number of people and composition of roles that you need to undertake the work in comparison to the number of people you currently have
2. **Skills gap:** the skills that you need employees to have so they can effectively and efficiently do the work in comparison to the skills your employees actually have.

You will need to identify strategies and actions to close these workforce and skills gaps. These strategies and actions will form the basis of your workforce plan that you will then need to prioritise, implement, monitor and review.

What are your current and future workforce gaps?

Once you have gathered your workforce supply and demand data, you are able to compare this information to provide a picture of the workforce gaps in your organisation. This process is commonly referred to as a gap analysis. At this stage, gathering information to better understand the skills gaps in your current workforce is crucial in identifying future skills needs that will align with your organisational objectives. The identification of these gaps will help to inform the basis of strategies and actions for development as outlined in the 'Assess the gaps' section in Stage 3, later on in this toolkit.

CONDUCT A GAP ANALYSIS

This step involves identifying current and future gaps in your workforce and the order in which the gaps should be prioritised for action. Depending on the level of workforce risk, not all gaps may need to be actioned.

You have the information needed to identify and assess your workforce gaps through the completion of the following templates:

- **Template 3:** Current workforce data and profile
- **Template 4:** Workforce supply, future demand and gap analysis.

Along with identifying your current and future gaps, summarise the information on existing workforce strategies that your organisation may already have in place. Think about the ongoing relevance of the strategies against the identified gaps and how effective these strategies have been to date.

	Planned growth/decline			
Current number of employees	Year 1	Year 2	Year 3	Total workforce gap
60	+10	+10	+10	30

	Potential resignations			
Current number of employees	Year 1	Year 2	Year 3	Total workforce gap
60	8	10	8	26
Totals	18	20	18	56

The information you supplied earlier will help you identify the gap between what your workforce looks like now and what it needs to look like in the future.

	Planned growth/decline			
Current number of employees	Year 1	Year 2	Year 3	Total workforce gap

	Potential resignations			
Current number of employees	Year 1	Year 2	Year 3	Total workforce gap

Example: If your organisation intends to expand through diversification/new technology, your workforce may need to grow. Other workforce changes such as resignations, retirement or if someone relocates will also need to be considered.

Once the extent of the workforce gaps have been determined and prioritised, effective strategies can be developed and implemented.

Developing strategies and actions is the culmination of the workforce planning process. This step brings together the analysis, insights and directions revealed in the previous steps.

Workforce strategy development can then be considered from the following perspectives:

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

For more detailed guidance on workforce supply and demand, you can use an alternative layout via the 'Workforce supply, future demand and gap analysis' template on the website www.jobsqueensland.qld.gov.au/wpc



THINGS TO CONSIDER

- Recruitment of under-represented groups is a great way to diversify your existing workforce.
- Employing people from an under-utilised cohort such as someone from a migrant community, Aboriginal peoples and Torres Strait Islander peoples, or someone returning to the workforce after a career break, can also bring innovative ideas and enthusiasm to a role.
- Some may require a flexible approach or support to their participation while they transition into your team.
- Don't be afraid to recruit differently to what you traditionally have.

What are your current and future skills gaps?

Your staff can be your most valuable asset. The skills and experience they bring to your organisation can be critical to its success. You might already have enough people working in your organisation, and they work well in a team doing what needs to be done, but with all the changes in your organisation, you might find you have a skills gap.

It is important to remember that needing new skills does not always mean you need to recruit someone new. It is often more cost effective to upskill your existing employees and retain good staff.

If your organisation is growing, this creates career opportunities for your current staff and a pathway into the industry for someone new.

By considering what your organisational goals are and how your workforce will support you in achieving those goals in the future, you can plan your way out of a skills gap.

A skills gap means there is a mismatch between the skills you need your employees to have to support your organisational goals, and the skills your employees actually have.

Examples of considerations	Why
Introduction of new equipment	○ Your staff might need training in how to use the equipment or how to maintain it properly.
Replacing resignations or promotions of existing team members	○ When people take on additional or new tasks, they may need support while they gain the skills and confidence they need to be efficient.
New team members	<ul style="list-style-type: none"> ○ New team members require inductions and support while they learn and become familiar with your organisation. ○ Team members who are training and supporting other team members may need improved coaching and communication skills they don't already have.

There is more information on developing your existing workforce in Stage 3.



STAGE 2 CHECKLIST

I understand:

- what I need to do to prepare to undertake workforce planning for my organisation (refer to **Self-assessment tool: Workforce planning inventory: Am I ready?**)
- my business direction and workforce considerations (refer to **Template 2: Knowing your business and workforce**)
- how to calculate workforce turnover (refer to **Fact sheet 2: Calculating your workforce turnover**)
- my current workforce profile (refer to **Template 3: Current workforce data and profile**)
- what my current workforce supply against future demand and the resulting gap could look like (refer to **Template 4: Workforce supply, future demand and gap analysis**).

Next, you will need to identify strategies and actions to close these workforce and skills gaps. These strategies and actions will form the basis of your workforce plan.



STAGE 3

IDENTIFY ISSUES AND FIND SOLUTIONS





KEY ACTIVITIES IN THIS SECTION

1. Understand the risk of not addressing your workforce gaps
2. Identify potential solutions
3. Prioritise what you need to do

Introduction

Leveraging the information you gathered in Stage 2, you are now ready to assess the level of workforce risk to your organisation if you were to take no further action. Determine the risk to achieving your organisational goals so that you can identify solutions and begin taking action.

Workforce risk - setting your workforce gap priorities

A workforce gap equates to a level of workforce or organisational risk. Understanding the level of risk and its potential impact on care delivery will help determine whether or not to address the gap.

The objective of good risk management is to ensure optimal, balanced and sustainable organisational performance. Your risk management process should be simple and flexible.

Risk assessment looks at the gaps in workforce supply and demand, and considers:

- the likelihood of not being able to fill the gap
- the consequence of not being able to fill the gap - whether the risk is low, medium, high or severe.

All gaps should be risk-assessed against the impact on the organisation from not addressing them. Conducting a risk assessment (**Template 5**) will assist you in prioritising your workforce strategies and actions.

Example: Risk matrix

LIKELIHOOD	VERY LIKELY			Advertised position but no suitable applicants	
	LIKELY		Staff have not been upskilled		Reduced productivity and employee losses
	UNLIKELY				
	RARE				Loss of key staff
		LOW	MODERATE	HIGH	SEVERE
		CONSEQUENCE			
		LOW	MODERATE	HIGH	SEVERE

Assess the gaps

Assessing workforce and skills gaps involves looking at three interdependent factors:

- workforce numbers and roles
- skills gaps
- demographic profile.

WORKFORCE NUMBERS AND ROLES

Workforce numbers and roles can be expressed in terms of headcount or FTEs (full-time equivalents). Both of these are legitimate approaches to considering the workforce, though from a financial perspective, workforce costs are normally referred to as FTEs.

Gaps often indicate an undersupply or oversupply of workers where there is likely to be turnover from resignations, retirements or planned extended leave (e.g. parental leave). Consider roles that are harder to fill, critical roles, or new types of roles that do not currently exist in your workforce or need to change to reflect new technologies. Consider if it is worthwhile including contractors, casuals and volunteers, if your organisation relies on them to complete work.

SKILLS GAPS

Skills gaps include the skills and capabilities needed now or in the future for your organisation that you may not currently have. Skills gaps can be addressed by upskilling existing staff or sourcing staff externally. They can be related to clinical care, regulatory knowledge, technology or other specific skills and are often difficult to predict.

DEMOGRAPHIC PROFILE

The analysis of your current workforce may highlight significant trends that require addressing. These may relate to an ageing workforce or diversity imbalances in roles where your workforce does not reflect the community. It may be important to address these trends if they impact on service delivery, recruitment or retention. Having a diverse workforce can bring new ideas and efficiencies.



TOOLKIT RESOURCE

TEMPLATE 5: Risk assessment worksheet

Use this template to assess your level of risk and identify and prioritise possible solutions.

Finding solutions – developing workforce strategies and actions

Workforce planning strategies and actions can be grouped into four key categories:

- develop your existing workforce skills and capability
- attract new employees to address skills gaps
- retain valued employees
- manage the workforce through organisational change.

These categories cover a range of activities to help ensure your workforce matches organisational requirements into the future. Yearly review of your workforce plan will ensure that the organisational objectives are still relevant. Strategies can also be adjusted in response to workforce and external trends.

Before developing specific solutions, review your current workforce planning strategies. Which strategies are working well, which are working somewhat and which ones aren't working at all? Consider each strategy and the reasons for your response. Is there a better solution?

Various resources to support you in finding working solutions are located at www.jobsqueensland.qld.gov.au/wpc

Develop your existing workforce skills and capability

Investing in the training and development of your workforce is a key strategy that can achieve improved productivity outcomes for your organisation. It can also improve employee job satisfaction and engagement. There are various approaches available to develop the skills of your workforce. These can include on-the-job training, accredited and non-accredited training, mentoring and coaching, as well as attendance at industry events.

When considering investment in time and resources required to train and develop employees, ensure you are clear on the skills and knowledge required for your organisation into the future.

This includes identifying skills gaps, and how and when the skills will be developed. Workforce development activities can include a focus on improving client service and interpersonal skills, technical skills or building leadership capability.

Developing the skills of your staff can be undertaken in a variety of ways. Using the 70-20-10 rule gives your employees different ways to learn and to grow their existing skills. This is also a good way to retain your valued employees and/or manage your workforce through change.

	70 per cent experiential learning	20 per cent social learning	10 per cent formal learning
Learn via	<ul style="list-style-type: none"> Job-related experiences Increased responsibility in current role so they can safely learn by doing 	<ul style="list-style-type: none"> Interactions with others Coaching/mentoring Giving feedback Researching 	<ul style="list-style-type: none"> Formal education Attendance at training sessions held by local training providers
Example	Christos to take on more responsibility working with complex client needs	Darren to mentor Samir in business management	Dip. Business Management and Leadership

Information about training programs supported by the Queensland Government can be found at www.desbt.qld.gov.au/training/employers

Ensuring the skills and knowledge of employees remains current will allow your organisation to remain productive and competitive in an ever-changing service delivery environment.

Attract new employees to address skills gaps

With increasing competition for skilled employees, attracting the right people is critical for the success of an organisation. Building, developing and maintaining a positive employer brand and employee experience is an important attraction strategy. A strong positive employer brand indicates the business is seen as a good place to work. This may include opportunities to develop and learn new skills, career prospects, good leadership, interesting work and good pay.

The employee experience is the alignment between the employer brand and how that translates in actual day-to-day activities. The working environment is increasingly important for jobseekers/potential



Skills and capability in action

As Darren and Amina plan for retirement, part of a succession plan may involve mentoring Samir while also supporting him to upskill. In this way, Samir can gradually take over the operation of the business.

employees as they are looking for a workplace where they are valued and treated with respect, have an opportunity to use their current skills and develop new ones, develop good working relationships and have input into how they do their daily work.

There are many ways to connect to potential employees. Preferred web-based recruitment and social media sites are important tools in our current environment to reach out to jobseekers. Other strategies include partnering with organisations, such as schools, vocational education providers or universities, that offer graduate or work experience programs. Offering an apprenticeship or traineeship can also be an attractive proposition, both for your organisation and for the new employee.

Retain valued employees

Replacing valued staff is a costly exercise. Organisations are faced with recruitment costs, as well as lost corporate knowledge, networks and experience. It takes time for new staff to become fully productive.

There are many reasons employees will consider leaving an organisation. Understanding the factors that influence employee decisions to stay or leave will assist in putting in place strategies and initiatives to keep valued employees. Finding out why people are leaving, what employees are thinking and what they want, can be done through staff surveys, exit interviews and regular conversations.

Employees are more likely to stay with an organisation if they have a working environment where they are respected and valued, have

meaningful work, have good relationships with their supervisors and co-workers, and are provided with opportunities to develop their skills.

Workplace arrangements such as part-time work, job-sharing and flexible work options can also assist in retaining employees if there is a change in their personal circumstances that needs to be accommodated in the short or long term. Some of these changes can include needing to care for family members, commencing study or wanting to reduce hours as they prepare to retire.

Understanding your specific workforce needs will allow the development of strategies and actions that will support the organisation to keep valued employees.



Retention strategy in action

Darren and Amina would like to hire an enrolled nurse to strengthen the organisation's clinical capacity and enhance the quality of care provided to clients. They recognise they currently do not have the skills within their own workforce and would need to either train existing staff or attract someone new.

As part of workforce planning discussions, it is identified that Christos is interested in nursing and has commenced his Diploma of Nursing. As a retention strategy, Christos will be offered opportunities to upskill by participating in training, mentorship, and practical experience focused on quality of care.

Christos has also recently requested, and will be provided with, increased flexibility to continue with his studies.

Job design

Now that you know what skills your team has, you may choose to rethink the way that you utilise employees' skills to find solutions to your workforce gaps and challenges.

Knowing what each position is responsible for and what tasks are required can provide an opportunity to review how things are done and who does what. This approach can support a more productive workplace, especially as an organisation grows and experiences change.

Utilising an employee's full range of skills can lead to higher levels of satisfaction and retention, and benefit your organisation.

Strategies that organisations are using to support effective job design include:

- considering employees with qualifications in other areas such as education and health or management and how to integrate other responsibilities into their roles
- identifying role responsibilities that can be logically grouped together that sit across different positions in the organisation to improve productivity
- considering how position responsibilities can be packaged to support flexible working arrangements of the workforce or used to attract workers that may not be seeking full-time employment.

Manage the workforce through organisational change

Industry transitions occur across the economy, resulting in changing workforce needs across the aged care sector. From a service delivery perspective, this can include the introduction of new technologies within aged care, changes in government or government funding as well as new providers entering the aged care sector. These changes can result in an increase or decline in demand for services.

Responding to change is not a 'one size fits all' approach. To get the best outcomes for an organisation and workforce, anticipating and planning for any significant change is important. Once it is clear what the impact and timing of the change will be, planning can commence.

Successful change within an organisation can be achieved through clear communication, engaging staff in discussions on how best to implement and manage the change, identifying skilling, upskilling and reskilling requirements, and providing transitional support to those affected by job changes.

If there are negative workforce impacts, managing affected staff in a compassionate, fair and reasonable manner is important. How individuals are treated during these processes will often influence what they say about your business to family and friends.

Remember, these family and friends could be your existing or future clients, or potential employees. Some of your employees may also be a member of a union. If this is the case, consider engaging with their union to see if there are other short-term alternatives available that will suit both your employee and organisational needs.



STAGE 3 CHECKLIST

I have:

- identified my workforce gaps and understood the workforce risks
- developed potential solutions for the workforce gaps, considering options such as recruiting, on-the-job training, promoting workers and increasing working hours
- prioritised what I need to do to ensure my workforce will be ready to meet my organisational goals.



STAGE 4

DEVELOP, IMPLEMENT AND MONITOR





KEY ACTIVITIES IN THIS SECTION

1. Develop your workforce plan, including an action plan
2. Implement your workforce plan
3. Monitor and review your workforce plan

Introduction

Putting your workforce plan in place means recording and implementing the actions you have identified to meet your workforce needs. Workforce plans are 'live' documents, that will need to be updated over time. To achieve this, monitoring and reviewing are important.

Develop a detailed workforce plan and an action plan

A detailed workforce plan (**Template 6**) that includes timeframes for implementation will identify what needs to be done (e.g. offering more flexible working hours for staff with families or caring duties), who needs to lead it (e.g. the facility manager), and when it needs to be done. There may be a need for additional resources or skills building to achieve the agreed actions (e.g. training workers in using particular software or redeploying existing staff to accommodate greater flexibility in the workplace).



TOOLKIT RESOURCE

TEMPLATE 6: Detailed workforce plan

This template will allow you develop a detailed workforce plan.

TEMPLATE 7: Workforce action plan on a page

This template will allow you to capture your workforce actions on one page.

Implement your workforce plan

Congratulations! It is time to put your workforce plan into action. Use **Template 7** to start putting the most important items in place as soon as you can to keep the momentum going. Get the relevant people involved and talk them through the action plan.

If any training was identified as part of your **workforce action plan on a page**, discuss with the relevant staff how this could be achieved and when is the best time for it to happen. Participating in training (internally or externally) needs to work for the organisation and the employee, and timing should be discussed to get the best outcome.

Monitor your workforce plan

It is useful to set quantitative goals (i.e. goals expressed in numbers) to measure the effectiveness of your workforce plan. For example, in your workforce gap analysis (**Template 4**), you may have identified a critical job group with high turnover and discovered that staff have left (or are finding it difficult to stay) because their working hours interfere with family caring commitments. You may have developed a workforce initiative to offer flexible working arrangements to address this issue. A plan such as this to reduce workforce turnover can be evaluated by measuring turnover percentages.

Other useful ways to evaluate your initiatives include:

- **Analysis of targets and actual results:** This includes identifying reductions/increases in workforce turnover and the reasons for them, number of vacancies filled, people trained or staffing costs reduced.
- **One-on-one discussions:** Checking in periodically with people in supervisory and hands-on care positions will give managers a first-hand understanding of how the business' plans are progressing and can help to identify where changes need to be made.
- **Informal focus groups:** This involves conducting informal group discussions regarding the organisation and its direction. This might be done as part of a regular staff meeting.
- **Employee surveys:** Employee surveys allow staff to give confidential feedback on the workplace and the way it functions. For example, questions may be formulated to find out how satisfied people are with their job, how their work/ workplace might be improved, and how committed they are to staying with the organisation in the future. This can provide managers with a valuable insight into how to improve workplace structures or processes in order to retain the staff they have, and to attract the staff they may need in the future.
- **Advisors/consultants:** You may choose to involve advisors who regularly work in your aged care service, such as industry experts who provide guidance on care models and legislative changes.

Regularly review the workforce plan

Your workforce plan should be reviewed and updated every year as part of the organisational planning process. Changes in intentions of key staff need to be understood and reflected in the workforce plan, with consideration given to how this may influence future service delivery and organisational planning.

Your evaluation of workforce initiatives forms the basis for adjustments or the development of new initiatives. It may also be necessary to redesign the workforce plan in response to changes in the goals of the organisation or its operating environment. Like business and financial plans, the workforce plan should be a living document, and should be reviewed periodically to ensure it is being implemented and remains current and relevant.

It is important to remember that workforce planning does not need to be complicated, but it does require thought and engagement with your staff.



STAGE 4 CHECKLIST

I have:

- developed a workforce plan (refer to **Template 6: Detailed workforce plan**)
- developed the workforce action plan (refer to **Template 7: Workforce action plan on a page**).



TOOLKIT RESOURCES: FACT SHEETS AND TEMPLATES



Toolkit resources at a glance

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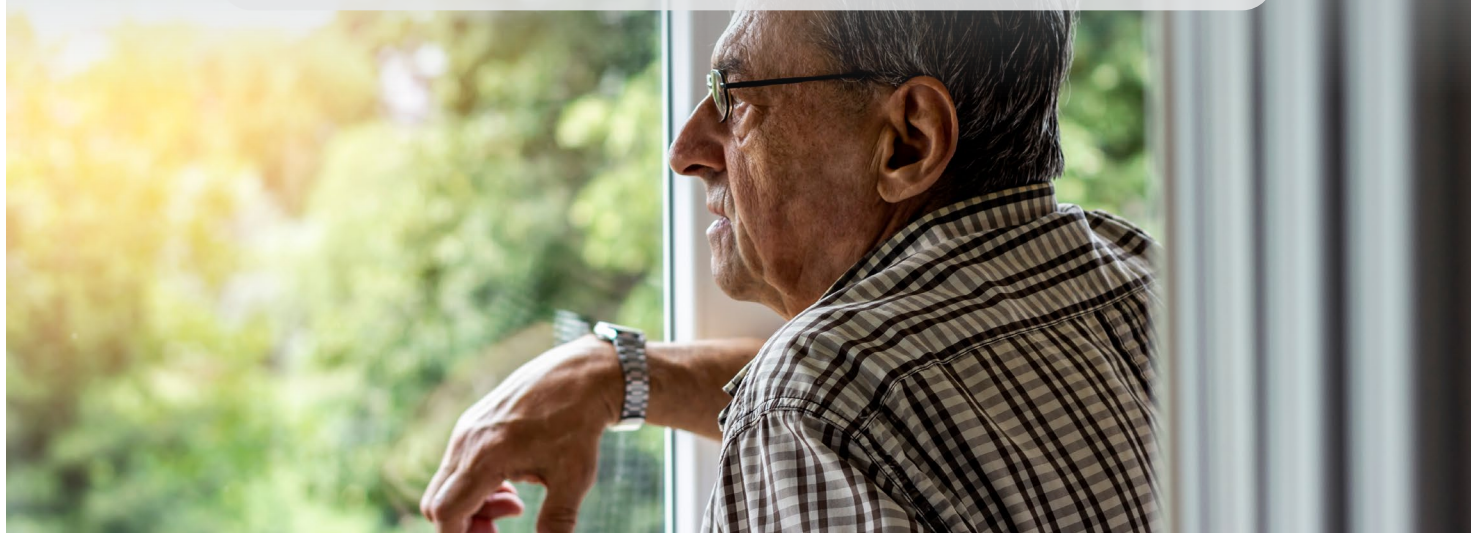


ACCESS THESE RESOURCES

The Workforce Planning Connect website provides access to:

- an online version of this toolkit
- downloadable fact sheets, self-assessment tool and templates that can be customised to your organisation
- links to other practical workforce planning and development resources and tools.

To find out more, visit the Workforce Planning Connect website at www.jobsqueensland.qld.gov.au/wpc



Overview of toolkit resources

Toolkit resources are a range of documents that you can use to develop your workforce plan. They provide additional information, assist your preparations or develop your plan. Toolkit resources include the following.

Fact sheets are short 1-2 page documents that provide information on various activities within the workforce planning process.

- **Factsheet 1: Workforce planning: A summary guide**

This fact sheet provides an overview of the four stages of workforce planning.

- **Factsheet 2: Calculating your workforce turnover**

This fact sheet shows you how to calculate workforce turnover.

Self-assessment tool: Workforce planning inventory: Am I ready?

This tool will assist you in determining your readiness to commence workforce planning in your organisation.

Templates are suggested forms that can be used to develop your workforce plan.

- **Template 1: Who should be involved? Stakeholder planning**

This template will assist you to identify who you should include in your workforce planning activities.

- **Template 2: Knowing your organisation and workforce**

This template will help you understand your organisation's direction and workforce considerations.

- **Template 3: Current workforce data and profile**

This template will help you identify and capture key data on your current workforce.

- **Template 4: Workforce supply, future demand and gap analysis**

This template considers your current workforce supply against future demand and the resulting gap.

- **Template 5: Risk assessment worksheet**

This template will assist in identifying the risk to your organisation that a workforce gap presents.

- **Template 6: Detailed workforce plan**

This template will allow you to develop a detailed workforce plan.

- **Template 7: Workforce action plan on a page**

This template will allow you to capture your workforce actions on one page.

Fact sheet 1:

Workforce planning: A summary guide

Workforce planning is about having the right people, with the right skills, in the right role, at the right time. Similar to business planning, it is a continuous process of understanding your current workforce skills (where you are now), desired skills for your future workforce (where you are going) and your workforce gaps, and developing strategies and actions to close those gaps (how you will get there). These strategies and actions can include training and development, recruitment and improving workforce performance.

KEY STAGES



1. GET STARTED

The purpose of workforce planning is not to decide what you will do in the future, it is about determining what you can do now to be best prepared for the future. Workforce planning doesn't need to be complicated, but it does require thought and engagement with your staff.



2. GATHER INFORMATION

Determine your current workforce

The current state of your workforce can be portrayed through workforce data. The current analysis should include the most recent data and, if it is available, historical workforce data. While there is no set period for workforce history, as a minimum, data should cover the previous 12 months.

Determine your future workforce

Understanding your future workforce and skills needs is about estimating the number and types of employees, and the skills required to deliver your organisational plan and goals.

Identify gaps

You should be able to identify where your workforce or skills gaps are emerging by comparing your current workforce with your future workforce.



3. IDENTIFY ISSUES AND FIND SOLUTIONS

Once you have identified actions that will address your workforce gaps, these can now be put into a plan that prioritises the actions, when and how they will get done, and by whom. It will also be useful to measure the success of the plan through being clear about what success looks like. For example, Christos has almost completed his Diploma of Nursing and is currently undertaking clinical placement. This will allow Darren and Amina to improve care coordination.



4. DEVELOP, IMPLEMENT AND MONITOR

Once you have prioritised your workforce plan actions, start communicating the priorities to your workforce and commence implementation. Don't forget to track how you are going against the plan, and regularly review it each time there are changes in your organisation or employees.



Workforce Planning Connect provides all the tips and resources you will need to take the next step on your business' workforce planning journey.

To find out more, visit the Workforce Planning Connect website at www.jobsqueensland.qld.gov.au/wpc

Fact sheet 2: Calculating your workforce turnover

WHY MONITORING WORKFORCE TURNOVER IS IMPORTANT

Workforce turnover can have a negative impact on your organisation in relation to productivity, client care, cost and efficiency. It also often means a loss of organisational knowledge around client history, internal processes and client relationships, and can result in extra workloads for remaining employees.

Most workforce turnover costs can be hidden, so it is often hard to quantify the actual cost to the organisation.

Costs may include:

- departing employees with accrued leave that needs to be paid out
- recruitment, including costs of advertising and recruitment agency fees
- new hires, including time spent reviewing applications, interviewing applicants and any relocation costs
- productivity losses, including work that is incomplete or delayed due to an empty role, and time spent inducting new employees.

Workforce turnover can also be helpful to your organisation. It provides an opportunity to identify what could be done differently across various roles and consider how new people can bring new ideas that will benefit your organisation.

Each industry and business has an average workforce turnover rate, and you need to consider what the right level of turnover is for your organisation. When you understand what your turnover rate is, you can anticipate and plan for this in your workforce plan.

For example, if casual workers are a known, you may choose to incorporate this annual workforce requirement within your plan. However, this will likely increase your turnover percentage. For this reason, you need to choose whether to include or exclude them when making your calculations.

To examine the cause(s) of your workforce turnover:

1. conduct an exit interview with staff who are leaving the organisation to identify any common reasons that may be easy to address in the future
2. conduct regular staff satisfaction surveys to monitor and track how staff are feeling and if they are considering leaving.

CALCULATE YOUR TURNOVER PERCENTAGE

Average number of employees	Calculations
Add the number of employees at the beginning of the period (at the beginning of a calendar or financial year) (e.g. 31) with the number at the end of the period (e.g. 25) and divide by 2	$(31+25)/2$ $= 56/2$ $= 28$
Average number of employees = (number at the beginning + number at the end) divided by 2	28
Turnover rate	
The number of employees who left your organisation in the same period	12
Multiply the number of people who left by 100 and then divide by the average number of employees in the same period	$(12 \times 100) / 28$
Turnover rate	42.85%

Self-assessment tool: Workforce planning inventory: Am I ready?

Before starting, check:	Yes	No
Do you have a current strategic business plan (i.e. for the next 3+ years)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a current operational plan (i.e. for the next 12 months)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an existing workforce plan? If so, use that as a starting point.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have support from your key people?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have the right skills in the organisation to lead workforce planning?	<input type="checkbox"/>	<input type="checkbox"/>
Are you ready to have discussions across your organisation on your current and future workforce challenges and opportunities?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have processes in place (or are able to quickly implement them) to collect workforce information/employee data?		
<ul style="list-style-type: none"> ○ Organisational department/unit/location ○ Position title/level ○ Job family (i.e. a group of job functions that involve work in the same general occupation) ○ Job family employment status – full-time, part-time, casual ○ Employee length of service with your organisation ○ Employee time in their current role ○ Diversity information (e.g. age, gender, cultural background, declared disability) ○ Employee qualifications (e.g. Bachelor of Nursing, Diploma of Nursing) ○ Employee tickets/licences ○ Full-time equivalent (FTE) or employee headcount ○ Turnover information – resignations and retirements ○ Workforce costs – wages/salary, overhead/variable costs (e.g. training) ○ Any other workforce data that is important to your organisation 	<input type="checkbox"/>	<input type="checkbox"/>

Don't worry if all of these things are not yet in place, it is important that you identify what you already have and what information you might need to collect in the future. Workforce planning does not need to be a daunting process and can still be successful for your organisation, regardless of its size. Starting to think about your workforce needs now and into the future is already a step in the right direction.

Template 2: Knowing your organisation and workforce

Use this questionnaire to reflect on your current business state and on your existing or future workforce. This information will provide key input to the workforce plan for your organisation.

Business strategy and direction – where are you going?

Questions	Responses
What are your key organisational goals for the next three to five years?	
What are your key priorities for the next 12 months?	
How will you know if the organisation is successful?	
What are the key factors that will achieve business success?	
How will you measure success?	
What major obstacles will the organisation face while striving to reach these objectives?	
What will need to be changed or realigned to achieve organisational priorities?	
What are your workforce strengths and weaknesses that are likely to influence your business strategy and objectives?	
What are the most significant changes (recent or projected) in your organisation or workforce?	

TEMPLATE 2: KNOWING YOUR ORGANISATION AND WORKFORCE CONTINUED ...

Are any of the following likely to affect your organisation over the coming years (1-3+ years)? If so, what will be the effect on the workforce?

- Changes in strategy or direction
- Significant cost reductions
- Outsourcing
- Implementing new technology/technology changes
- Changing client expectations or requirements
- New services
- Improvements in efficiency
- Changes in government policy or legislation
- Economic trends
- Environmental issues
- Other _____ (specify)

Understanding the current organisation – SWOT

What are the competitive strengths of your organisation?

What are the major weaknesses of your organisation?

What are the biggest opportunities that you see today for your organisation?

What are the biggest threats you see today for your organisation?

TEMPLATE 3: CURRENT WORKFORCE DATA AND PROFILE CONTINUED ...

HOW TO COMPLETE

- Populate the table with your relevant workforce information.
- You may already have recorded some of this information elsewhere so it will be easy to locate.
- You may need to talk to your employees or their managers to gather other information.

You may decide that you only want to work with what information you know at this stage. That's okay, though you may miss an opportunity to gain knowledge about your workforce and how your organisation may benefit from that.

SOME NOTES ON THE DATA THAT YOU ARE COLLECTING

Location: if your organisation is located across multiple sites, you can identify at which site each employee is located.

Date commenced: the date the employee commenced working with your organisation.

Pay level: this can be used to reflect the different classification or award levels that your employees are paid at.

Employment status (headcount): understanding how you have structured your workforce is important when considering your workforce risks and potential actions. This should always be 1 under the correct type of employment.

Full-time equivalent (FTE): this is a common term from an accounting perspective. Calculating an FTE is simple. $FTE = \text{total number of hours worked at ordinary pay rates} / \text{total number of available hours at ordinary pay}$. For example, the award on which you pay your employees states that the standard working week is 38 hours. Darren is scheduled to work 38 hours, plus any overtime. Darren is 1 FTE = 38 hrs/38 hrs. Amina is scheduled to work 25 hours per week. Amina is 0.66 FTE = 25 hrs/38 hrs.

Years in role: this can be different to the years in your organisation. It can indicate a new role for that person, or if they have been in the same role for a while, they may be wanting a new challenge.

Job family: people can belong to the same job family even if they have different position titles. For example, your owners are both in business management. This will assist in understanding your workforce's core skills.

Qualifications: any qualifications can be captured here. This will assist in identifying potential training needs, and in understanding each employee's skills and knowledge.

Diversity: people for whom English is a second language, have a disclosed disability or are from a marginalised group.

Workforce cost – wage/salary: annual wage or salary.

Workforce cost – overheads: include superannuation, leave loading, training costs etc.

OTHER THINGS TO CONSIDER

- You may choose to also track annual leave for your regular staff. Leave arrangements can impact business continuity and can be planned for.
 - Planning for relieving these staff while they are on annual leave provides opportunity to upskill your existing employees.
- Peak season when you have seasonal workers can also be tracked. If you know you regularly need a specific number of people in certain roles, you can list them as a job title rather than an individual's name.

Template 5: Risk assessment worksheet

Identified risk (e.g. Registered nurse retiring)

Likelihood of occurrence (e.g. very likely)

Consequence of occurrence (e.g. high)

Risk rating (e.g. severe impact on organisation if not replaced)

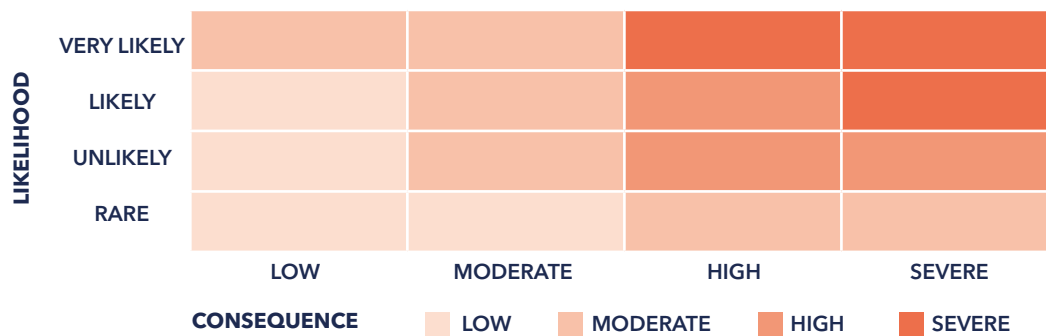
Priority for action (e.g. 1)

Action/s (e.g. replace/don't replace)

Workforce strategy (e.g. recruit a new manager, take on a trainee, reskill an existing worker)

Monitoring and evaluation

Risk matrix



Template 6: Detailed workforce plan

Introduction to the workforce plan

Aims and objectives of the workforce plan

Organisation or workforce constraints that have been identified

Assumptions that have been made

Organisational goals for the next ____ months/years

Business opportunities and challenges

What does success look like?

Key workforce information

Key workforce risks

Workforce strengths, opportunities and challenges

Monitoring and evaluation

GLOSSARY



Glossary of terms

Workforce segmentation

Workforce segmentation is grouping your workforce by similar characteristics.

Some approaches to workforce segmentation include:

- **Role-based or job family:** Jobs are segmented by the type of work performed (e.g. facility management, clinical care staff, team leaders (clinical), or by similar occupational groupings such as facility manager, clinical care coordinator and registered nurses. This approach allows you to identify and focus on the skills and capabilities that are important to your business.
- **Employee-based:** Segmentation can be by demographics such as work location, gender or age profile. This approach can inform workforce risks from potential workforce availability by these segments.
- **Business structure:** Many organisations display their workforce structure through an organisational chart, which is useful for demonstrating business units and reporting lines. However, organisational charts don't show the skills and capabilities within the organisation, which is essential for workforce planning.

Workforce information

Workforce information covers a range of intelligence and data that exists or can be created about your workforce.

QUANTITATIVE

- Positions: How many are filled or vacant?
- Positions: What positions have been budgeted for?
- Resignations: How many and why?
- Recruitment: How many positions, by type and reason for the particular role needed?
- Diversity information: What is the diversity of your workforce in terms of age (including youth and mature age), gender, cultural background, declared disability?
- Qualifications: What type of qualifications are required?
- Skills: What specific skills are required?

QUALITATIVE

- Learning and development needs
- Employee engagement
- Work life stage (new to the workforce, early -, mid- or end-career workers)
- Career aspirations
- Individual worker intentions to stay or leave

While this is not an exhaustive list of workforce information that an organisation may have available, it demonstrates the breadth of information that already exists or can be gathered to assist with workforce planning.

Workforce supply

Workforce supply is the size of your current and future workforce. It takes into consideration employee turnover through resignations and retirements, and how these affect the size of your workforce over time.



Scenario

Your organisation has 60 employees. There are at least eight resignations each year and you have two people planning to retire over a three-year period, therefore you would only have 34 employees left in your organisation.

Current number of employees	Resignations			Retirements			Year 3 total employees
	Y1	Y2	Y3	Y1	Y2	Y3	
60	8	8	8	0	2	0	34

Workforce demand

Workforce demand is the number of employees you will need today and into the future to deliver against your organisational plan.



Scenario

Your organisation currently has 60 employees. If you need to increase by 10 employees every year in order to grow and meet client expectations, at the end of the three years, you would need to have 90 employees.

Current number of employees	Planned growth			Year 3 total employees
	Y1	Y2	Y3	
60	10	10	10	90

Workforce gap

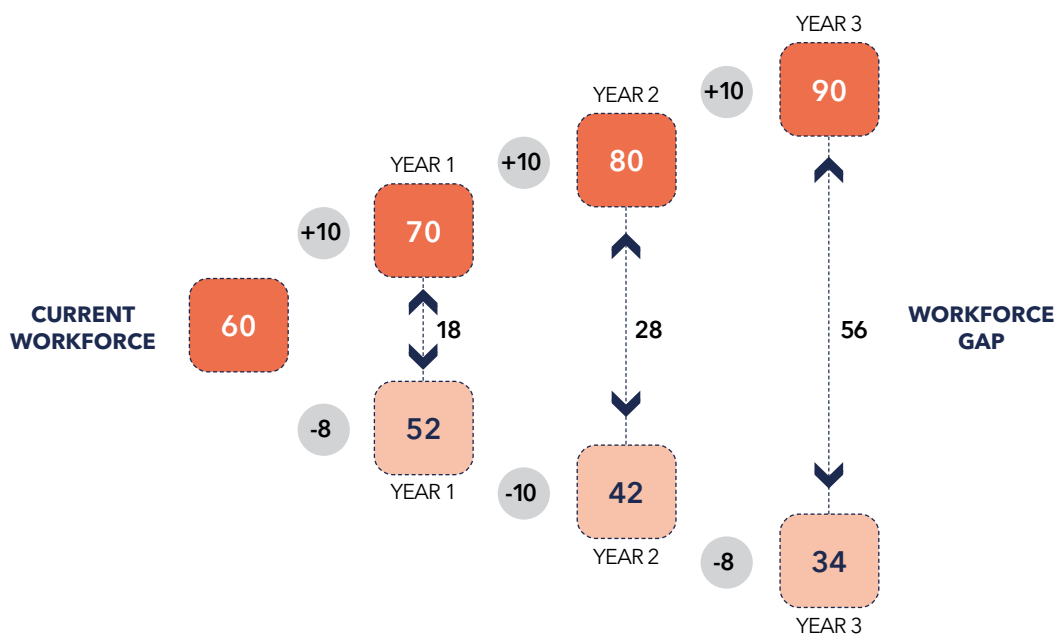
A workforce gap is the difference between what your workforce looks like now and what it needs to look like in the future.



Scenario

Your organisation currently has 60 employees and you need to grow by 10 people each year. Analysis of your workforce data shows that on average your organisation loses eight people a year to resignation or retirement. Assuming you do nothing to replace these employees at the end of the first year, you will have a gap of 18 people. In other words, you will have 52 employees instead of the 70 employees required to keep growing your organisation. This gap will increase to 28 at the end of the second year if you continue to take no action. You will then only have 42 workers as opposed to the 80 employees you had projected to meet your organisational requirements. If you take no action, by the end of the third year, when you had projected to employ 90 workers, the gap is now at 56, with just 34 employees available. Your organisation will be shrinking, not growing.

YEAR 1	Current number of employees	Planned growth Y1	Resignations + retirements Y1 (-)	Total workforce	Year 3 total employees
	60	10	8	52	18
YEAR 2		Planned growth Y2	Resignations + retirements Y1 (-)	Total workforce	Year 3 total employees
		10	10	42	28
YEAR 3		Planned growth Y3	Resignations + retirements Y1 (-)	Total workforce	Year 3 total employees
		10	8	34	56



Workforce risk

A workforce risk is any workforce issue that could result in an event that is detrimental to a organisations outcomes and outputs. Risks may arise where there is a gap between a organisations existing workforce and the workforce required to deliver its services and goals. You need to manage the workforce risks to your organisation by identifying and analysing the things that may have an adverse effect on your organisation and choosing the best method of dealing with each of these identified risks.

Workforce skills gap

A workforce skills gap means there is a mismatch between the skills you need your employees to have to support your organisation goals, and the skills your employees actually have.

Developing the skills of your staff can be done in a variety of ways and does not necessarily mean sending someone to attend a formal training course.

Workforce risks can come from two main sources:

- internal to the organisation through business strategy and direction, resources, workplace culture, organisation structure, workplace health and safety, leadership, resignations, and workforce skills and capabilities
- external to the organisation through market competition, disruptive technologies, economic environment, client preferences, government policy, and international and industry trends.

By undertaking regular workforce planning, your organisation should be able to identify most workforce risks. Identifying and understanding workforce risks can involve a number of activities, including:

- monitoring and analysing relevant workforce data that will impact on service delivery, such as high workforce turnover or unplanned absences
- employee survey results that measure job satisfaction and future intentions to stay or go, and number of vacant positions, including how long it takes to advertise, and for each new employee to commence and also undertake all the necessary induction activities.

The questions to ask yourself are:

- What could cause an impact?
- How serious would that impact be?
- What is the likelihood of this occurring?
- Can it be reduced or eliminated?

Committing to monitoring and reporting workforce data and regularly reviewing your workforce plan will enable you to identify emerging issues as they arise and to adequately respond.

Visit Ageing Australia's Workforce Hub at
employment.agedservicesworkforce.com.au



To find out more, visit the Workforce Planning Connect
website at www.jobsqueensland.qld.gov.au/wpc



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