**WORKFORCE FORECASTING TEMPLATE**

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| BUSINESS GOALS AND INFLUENCERS | |
| **GOALS** |  |
| **VISION** |  |
| **GOALS** Short, Medium, and Long-Term |  |
| **CUSTOMERS** Current and future customer landscape |  |
|  |  |
| **INTERNAL AND EXTERNAL FACTORS** | |
| **IMPACT** Consider future growth or downsizing, process changes, etc. |  |
| **INTERNAL FACTOR IMPACT** |  |
| **EXTERNAL FACTOR IMPACT** Consider industry trends, economic conditions, market shifts, etc. |  |
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| **OUTLOOK** |  |
| **WORKFORCE NEEDS** Skills and capabilities required to fulfill goals; noted areas of impact |  |

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| CURRENT WORKFORCE PROFILE | | |
| **CURRENT SKILLS, CAPABILITIES, AND CAPACITY** | | |
| **ROLE TYPES AND QUANTITIES** | **LEVELS OF SKILLS AND QUALIFICATIONS** | **EMPLOYMENT TYPES** |
| Workforce role types with numbers breakdown | Current workforce skills, competencies, and developmental goals | Employment types with overview of paid / unpaid,  full / part-time |
|  |  |  |
|  |  |  |
| **CURRENT WORKFORCE CHARACTERISTICS** | | |
| **GENDER DISTRIBUTION** | **ETHNICITY PROFILE** | **AGE PROFILE** |
|  |  |  |
| **EARNINGS PROFILE** | **DISTRIBUTION / WORKFORCE LOCATIONS** | **WORKFORCE RECOGNITION & SUPPORT STRUCTURES** |
|  |  |  |
| **REGIONAL / NATIONAL COMPARISON** | **VACANCY / RECRUITMENT PRACTICES** | **EXIT PROCESSES** |
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| **STRENGTHS ANALYSIS** | | |
|  | ADVANTAGES | DISADVANTAGES |
|  | **STRENGTHS** | **WEAKNESSES** |
| CURRENT |  |  |
| Consider current resource, capability, and performance strengths and issues. What is done well and what areas require improvement? |  |  |
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|  | **OPPORTUNITIES** | **THREATS** |
| FUTURE |  |  |
| Identify potential opportunities and potential threats. What future developments could attract required workforce? Are there potential skills shortages, workforce competition, recruitment or retention issues, or distribution challenges to consider? |  |  |
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| FUTURE WORKFORCE PROFILE |  |  |
| **FUTURE SKILLS, CAPABILITIES, AND CAPACITY** | |  |
| **ROLE TYPES AND QUANTITIES** | **LEVELS OF SKILLS AND QUALIFICATIONS** | **EMPLOYMENT TYPES** |
| Workforce role types with numbers breakdown | Future workforce skills, competencies, and developmental goals | Employment types with overview of paid / unpaid,  full / part-time |
|  |  |  |
|  |  |  |
| **FUTURE WORKFORCE CHARACTERISTICS** | | |
| **DESIRED GENDER DISTRIBUTION** | **ETHNICITY PROFILE** | **IDEAL AGE PROFILE** |
|  |  |  |
| **TARGET EARNINGS PROFILE** | **POTENTIAL DISTRIBUTION / WORKFORCE LOCATIONS** | **WORKFORCE RECOGNITION AND SUPPORT STRUCTURES** |
|  |  |  |
| **REGIONAL / NATIONAL COMPARISON** | **VACANCY / RECRUITMENT PRACTICES** | **EXIT PROCESSES** |
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| GAP ANALYSIS | | | |
| **WORKFORCE NEEDS** | **GAPS BETWEEN STATE OF CURRENT AND FUTURE WORKFORCE** | **PRIORITY** | **MEASURES TO TAKE TO ADDRESS GAPS** |
| ROLE TYPES AND QUANTITIES |  |  |  |
| LEVELS OF SKILLS AND QUALIFICATIONS |  |  |  |
| EMPLOYMENT TYPES |  |  |  |
| GENDER DISTRIBUTION |  |  |  |
| ETHNICITY PROFILE |  |  |  |
| AGE PROFILE |  |  |  |
| EARNINGS PROFILE |  |  |  |
| DISTRIBUTION / WORKFORCE LOCATIONS |  |  |  |
| WORKFORCE RECOGNITION AND SUPPORT STRUCTURES |  |  |  |
| REGIONAL / NATIONAL COMPARISON |  |  |  |
| VACANCY / RECRUITMENT PRACTICES |  |  |  |
| EXIT PROCESSES |  |  |  |

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| WORKFORCE DEVELOPMENT PLAN | | | | |
| **WORKFORCE CHALLENGES PRIORITIES** | **ACTIONS REQUIRED** | **DESIRED OUTCOMES** | **WHO** | **WHEN** |
| PLANNING |  |  |  |  |
|  |  |  |  |  |
| ENGAGEMENT & RECRUITMENT |  |  |  |  |
|  |  |  |  |  |
| SUPPORT, TRAINING, & DEV. |  |  |  |  |
|  |  |  |  |  |
| RECOGNITION & RETENTION |  |  |  |  |
|  |  |  |  |  |
| LEADERSHIP & COMMUNICATION |  |  |  |  |
|  |  |  |  |  |
| OTHER |  |  |  |  |
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| TRAINING AND GROWTH PLAN | |  |  |  |  |  |
| **TRAINING / GROWTH REQUIREMENT** | **NEED ADDRESSED** | **WHO** | **TIMELINE** | **DELIVERY METHOD** | **PROVIDER** | **PROJECTED COST** |
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| WORKFORCE FORECASTING REVIEW AND EVALUATION | | |
| **DATE FORECAST COMPLETED** | | **COMPLETED BY** |
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|  | |  |
| **YES or NO** |  | |
|  | Is there a clear picture of where the business is going? | |
|  | Is there a strong understanding of future requirements? | |
|  | Have areas of workforce development need been identified in order to reach set goals? | |
|  |  | |
| **SUCCESSES** Describe elements of the planning process that went well. |  | |
| **FUTURE IMPROVEMENTS** Describe changes you would make to the process. |  | |
| **TAKEAWAYS** List key actions to carry into future planning processes. |  | |
| **ADDITIONAL COMMENTS** |  | |