# STRATEGIC DRIVERS

|  |  |
| --- | --- |
| Short and long-term organizational goals |  |
| Expected program changes over the next 1-3 years and what drives these changes |  |
| Specific workforce challenges the organization is expected to face in the short and long-term |  |
| Challenges in emerging market and economic and political environment |  |
| Stakeholder engagement strategies |  |
| Upcoming legislative, policy, or regulatory changes that may affect organization |  |

# SUPPLY ANALYSIS

|  |  |
| --- | --- |
| Current workforce demographic |  |
| Assessment of workforce alignment / support to current business strategy and needs |  |
| Number of employees at each organizational level |  |
| Attrition rates and the effect on organization’s ability to deliver services |  |
| Current distribution of employee years of service |  |
| Overall workforce retirement eligibility in (X) years |  |
| Workforce retirement eligibility in (X) years for leadership & mission-critical / hard- to-fill positions |  |
| Plans (if any) to fill behind employees who have left (recruitment sources, internal/external hires, grades, etc.)  |  |
| Costs of replacing talent internally vs. externally |  |

# DEMAND ANALYSIS

|  |  |
| --- | --- |
| Plan or strategy to measure workload in the organization (include units of measurement) |  |
| Amount of work anticipated per year, based on the strategic plan (or other projection of work) |  |
| Number of people needed to accomplish current workloads  |  |
| Any anticipated workload changes due to efficiency gains, program changes, or other circumstances |  |

# GAP ANALYSIS

|  |  |
| --- | --- |
| Describe the gaps between your workforce supply and workload demand. |  |
| Identify what gaps are most critical considering the strategic goals. |  |
| Prioritize the gaps in terms of what to address first, second, third, etc. |  |
| Identify which gaps are most difficult and easiest to close. |  |
| Identify which gaps have more of an effect on organizational performance. |  |

# SOLUTION FORMULATION AND IMPLEMENTATION

|  |  |
| --- | --- |
| Identify any existing workforce intervention strategies.  |  |
| Identify any applicable strategies other organizations used when faced with similar problems.  |  |
| State the most critical gaps to address. |  |
| Assess if the solution requires a multi-pronged approach (if so, describe possible approaches). |  |
| Identify any factors that might impede the success of the strategy (unions, federal law, organizational policies, etc.). |  |
| Describe short-term and long-term implementation activities.  |  |

**WORKFORCE FORECASTING TEMPLATE**

|  |
| --- |
| 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.  |   |
|  |  |
| **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?  |  |  |
|   |   |
|   |   |
|   |   |
|  | **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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