How to Develop a Workforce Plan for Your Institution

- Do your research on workforce planning and decide if this is the right time to pursue this large undertaking.
- Do you have the financial and human resources to conduct workforce planning on a systematic basis?
- How will you involve supervisors and managers in plan deployment?
- What are the roadblocks and the benefits you anticipate?
- Present your proposal for workforce planning, documenting the need and advantages to top management, and get buy-in and support.
- Develop a comprehensive communications plan.
- Review your institution’s mission, strategic plan, succession plan and goals.
- Conduct an environmental scan of your workforce.
- Identify numbers, titles and duties of positions in each division or department.
- Ask about vacant positions and their future efficacy.
- Identify existing needs currently unmet.
- Forecast trends and financial resources; how will they impact the existing labor pool and projected labor needs?
- Identify future skills or abilities not currently present in your workforce.
- Identify gaps or excess staffing.
- Model the proposed workforce against projected needs.
- Detail workforce alignment strategies.
- Will positions be eliminated or redeployed/ transferred?
- How will new skill sets be acquired?
• What positions need to be redesigned?

• What is your timeline?

• Do you need to coordinate workforce changes with retirements or turnover?

• How should promotions be handled in the context of the workforce plan?

• For what positions will you need to recruit from the external labor market?

• Implement and review annually.

• Integrate with other planning processes.