Manager:	Department:

Step 1: Understand the goals of your organization/department

ACTION: Identify the vision of your organization/department:	
• State the vision and values. • Describe the agency's core responsibilities/programs.	

Vision Statement:

Core Responsibilities:	Programs:

Manager:	Department:

Step 2: Describe your department's goals and the structure you will need to achieve them.

ACTIONS:

- List the goals of your workgroup in the column entitled "Department Goal Description."
- List your plan to achieve each goal in the column entitled "Plan to Achieve."
- Insert or attach a copy of the proposed organization chart that you will use to achieve your goals.
- List the roles (Example: Project Manager) you will need in the column entitled "Proposed Workgroup Roles," and identify with a "x" whether you (1) already have them, (2) plan to develop them, (3) hire them, or (4) outsource them in the appropriate columns.

Department Goal Description:	Plan to Achieve:

Proposed Organizational Chart (roles only):
* please indicate if attached

Proposed Workgroup Roles:	Have	Develop	Hire	Outsource

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Manager:	Department:

Step 3: Describe the knowledge, skills and abilities (KSAs) needed to achieve your goals

ACTIONS:

- Review your goals and workgroup roles (identified in Step 2), identify KSAs needed to achieve the goals and to successfully function in the role
- Identify with a "x" whether the KSA is (1) Core meaning everyone should have, (2) Specialized meaning only a subset need or (3) Cyclical meaning needed for a period of time (i.e. prior to process improvements, recurring operational task/project, etc.)

Knowledge, Skills and Abilities	Core	Specialized	Cyclical

Manager:	Department:

Step 4: Evaluate your current talent.

ACTIONS:

- Insert Employee's name
- Insert Employee's role and/or function
- Describe uniqueness of KSA (if applicable)
- Indentify with a "x" whether the employee is (1) Fully functioning in their role/function, (2) Developing in their role/function, or (3) Seemingly unsuitable for their role

Employee	Role/Function	Unique KSA	Fully functioning	Developing	Seemingly unsuitable

Manager:	Department:

Step 5: Determine any gaps

ACTIONS:
- Review your "Proposed Workgroup Roles" (in Step 2), assess them against your current talent (in Step 4) to determine if your original assessment of whether the proposed roles currently exist, are developing, or should be hired (in Step 2) is still accurate. Make any necessary changes in Step 2.
- Comparing your proposed workgroup roles and your current talent, identify all roles that are missing or developing, then identify a plan to address this deficiency
- Review your list of KSAs needed to achieve your goals (in Step 3), compare them against your current talent (in Step 4) , identify all KSAs missing or developing, then identify a plan to address this deficiency

Roles (missing or developing)	Action Plan:

KSAs (missing or developing)	Action Plan:

Manager:	Department:

Step 6: Anticipate attrition.

ACTIONS:
Attrition is a reduction or decrease in number, size, or strength. Attrition can be a result of retirement, involuntary and voluntary termination, transfers, reorganization, etc.

- Identify the employees that you feel may be considering leaving your organization/department
- Indicate the employee's role
- Identify a reason for the departure (retirement, transfer, termination, etc.)
- Identify a "best-guess" for attrition date
- Indicate the level of vulnerability(high, medium or low) to you achieving your goals if this individual left your organization/department

Employee name	Role	Attrition Reason	Attrition Date	Vulnerability

Manager:	Department:

Step 7: Pull it all Together

ACTIONS:
- Copy your proposed organizational chart (in Step 2) and replace the roles with the appropriate name of the employee that you anticipate will or can function in that role. You may need to provide more than one organizational chart if you factor in your anticipated attrition
- Identify on the chart whether the employee is currently fully functional ("F") or developing ("D") as indicated in Step 4
- Verify that the roles on the chart that were not replaced with a name are the same roles you indicated as "missing" in Step 5. Resolve any discrepancies.
- Compare the list of your current employees with the names on your proposed organizational chart. Identify (below) all employees not listed on the proposed organizational chart.

Important Note:
Subsequent discussions must occur to determine the appropriate action for employees identified below. Being listed below does not automatically indicate a poor performer or incompetence. Some individuals' skills may be more suited for another organization/department. Please remember workforce planning is a systemic way of identifying and placing the right people, with the right skills, in the right place at the right time.

Proposed Organizational Chart (with names):
* please indicate if attached

Employee :