Completely Steps 1–3 of the Workforce Planning Worksheet

Step 1 - Understand the goals of your organization/department
Step 2 - Describe your department’s goals and the structure you will need to achieve them.
Step 3: Describe the knowledge, skills and abilities (KSAs) needed to achieve your goals

Schedule the meeting far enough ahead of time to allow for preparation. Establish the expectation that preparation is a must in order to participate, and follow-up to make sure people have done their pre-work.

Pre-work:
(1) Ask the group to imagine what this team, department or organization could look like 3-5 years from now. What would success look like? What could you achieve? What would they love to achieve? If they were to pick up a newspaper 3-5 years from now, what would the headline say about what this group has accomplished?
(2) Based on your vision of this team, department, or organization what would the organizational structure look like? Determine possible design alternatives.

At the start of the meeting, review the desired outcomes, agenda, process and ground rules.

Creating the Vision, Values and Goals:

1. Draw three columns on a flip chart or have three separate flip charts. Label them Vision, Values, and Goals.
2. Brainstorm key words or short statements covering vision, values, and goals. Write each on the flip chart.
3. Once all thoughts are written on the chart consider the vision column/chart first. Group similar words or expressions and re-title if necessary. Add further ideas. Now combine the short list of main ideas into one statement. The final wording may take several iterations. It is often helpful to start with a phrase such as ‘we aim to become…’ or ‘our vision is to…’
4. Repeat the procedure with the value column/chart. Remove duplication. Group thoughts into themes, and summarize these themes as single words, or short phrases.
5. Review the goals, determine if the goals listed align to the vision and values. Determine if the list is comprehensive and realistic. Prioritize the goals.

Organizational Structure

1. Facilitate a discussion of the pros/cons of each alternative design
   - Assess the new design against the newly developed design principles.
   - Discuss how different changes impact the supporting systems.
   - Discuss concerns
2. Examine the necessary changes to work, roles, etc. to support this change.
   - Determine if the physical layout of the work environment should be changed in order to support the new design.
   - Determine the number of people needed to support workload.
   - Eliminate unnecessary activities.
   - Analyze the workflow of the department/unit.

This is ONLY a suggested method for completing Steps 1-3
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• What tasks are important?
• Perform a workflow analysis.
• Analyze the organization charts.
  o Look for a logical span of control and authority issues.
• Analyze the roles/responsibilities of individuals.
  o Determine the required knowledge, skills and abilities
  o Determine new responsibilities of individuals for approvals, etc.
  o Determine new tasks/roles of individuals under the new design.

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