Getting the right people in the right place at the right time doesn’t happen by chance.
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1. The purpose of workforce planning

Workforce planning is about ensuring that your staffing matches business needs. Workforce planning can:

- identify future workforce needs,
- define your unit’s current capabilities and;
- help determine strategies to move from the workforce you have to the workforce you need.

Timely workforce planning can assist you to manage and potentially reduce costs by:

- maximising staff capabilities;
- managing staff turnover;
- helping with succession planning;
- avoiding staff shortages/surpluses and
- improving career management.

You will need to consider workforce planning issues when:

- strategically planning for growth or sustainability of your unit;
- planning changes in activity eg. establishing a new program, accrediting a program, restructuring services e.g. separation of TAFE and Higher education;
- managing change in response to changing external requirements or internal issues arising and;
- reviewing positions as staff leave the University.

This Workforce Planning Guide can be used when you are considering staffing requirements as part of your regular planning processes:

- Financial Projections and Annual Budget
- Business planning.

Making it happen

This guide will assist you with developing a plan of HR strategies to ensure your future workforce supports your strategic direction. To develop the plan you need to work through the following steps:

A. Determine future activities and workforce needs
B. Analyse current workforce
C. Identify gaps and workforce strategies to address gaps (staff numbers and/or capabilities)
D. Assessing workforce implications arising from your Resource Group’s Workplan

Available assistance

- Your HR Manager can assist you with any aspect of workforce planning.
- Jim Humphrey and Martin Tyrrell, Senior Systems Development/Consultant ext 50782 and 50789 can assist you with any workforce reports generated from SAP. This includes Managers Desktop.
2. **Planning at RMIT University**

As a knowledge organisation **our success depends on our people.**

Workforce planning is conducted as part of the RMIT Planning and Review Framework depicted below, in response to an emerging issue, or at times of significant change (including people leaving).

![Diagram of RMIT Planning and Review Framework]

- **RMIT University Strategic Plan**
- **RMIT University Business Plan**
  - Sets out Strategies, Targets and Priorities
  - Profile and Budget
- **University Academic Plan**
  - Learning and Teaching Strategy
  - Research and Innovation Strategy
  - Industry Engagement Strategy
- **College or Portfolio Plans**
  - Set out priorities for the College or Portfolio, guide PVC Workplans and School Plans
- **School Plans**
  - Set out priorities for School, guide Heads of Schools Workplans
  - **Resource Group Plans**
    - Set out priorities for Resource Groups, including indicators of success and guide Workplans
- **Discipline/Group/Unit Plans**
  - Set out individual priorities and targets to achieve Group/Unit Plan
- **Individual Workplans**
  - Set out individual priorities and targets to achieve Group/Unit Plan
3. **Workforce planning at RMIT University**

### A. Determine future activities and workforce needs
What job roles and capabilities will be essential to support future activities?

### B. Analyse current workforce
What is our current workforce and how could it look in the future based on current trend data?

- **Minor gaps:**
  - Recruitment
  - Professional development
  - Relocation or redeployment
  - Remuneration flexibility

- **Major gaps:**
  - Recruitment and attraction
  - Change management (cultural, structural or operational change)
  - Professional development
  - Relocation or redeployment
  - Succession planning

### C. Identify gaps and workforce strategies to address gaps
What will be the impact on staff numbers and capabilities in the future? How will we build the workforce we need?

- **Workforce is stable:**
  - Retention strategies
  - Professional development
  - Ageing workforce

- **Minor gaps:**
  - Recruitment
  - Professional development
  - Relocation or redeployment
  - Remuneration flexibility

- **Major gaps:**
  - Recruitment and attraction
  - Change management (cultural, structural or operational change)
  - Professional development
  - Relocation or redeployment
  - Succession planning

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**A. Determine future activities and workforce needs**

The first phase of workforce planning is to determine future activities, the workforce you will need and issues for your current workforce. You will determine future activities through your business planning processes and have already documented these in your Resource Group Workplan.

**B. Analyse current workforce**

The Managers Desktop is a key feature on SAP and provides you with an overview of your staffing profile. Data is presented about employee type, employment mode, age, gender, length of service, pay scale, turnover / retention, absenteeism and leave trends, leave liabilities; salary levels and averages.

People and Culture prepare and review some of the Resource Group’s workforce data and will provide this data to assist you to analyse your current workforce.

There are two types of reports in Management Desktop: Snapshots and Date Range. All SAP reports can be grouped either by Resource Group.

To fully analyse your current workforce, you also need to consider individual staff Workplans (for continuing and fixed term staff); workload allocations and use of casual/sessional staff.

This information will help you understand the capacity available in your work unit, the professional development needs of your staff and proposed leave plans - all of which impact on your current workforce to deliver outcomes.
C. Identify gaps and workforce strategies to address gaps

Once you have identified key gaps between your current workforce capabilities and future workforce needs you can design a range of strategies to reshape your workforce, including:

- attracting and recruiting high performing staff for particular roles;
- implementing retention strategies, such as improving staff satisfaction through job redesign, job enrichment, career development;
- implementing change management strategies (cultural, structural or operational change);
- redeploying staff from roles no longer required to other work;
- adjusting remuneration to ensure staff are fairly paid according to the nature of their work;
- relocating staff to different offices or campuses; and
- planning for succession of key roles and preparing staff to take on new duties.

When documenting the key strategies in your Workforce Plan, remember Workplace Agreement obligations; existing RMIT policies and procedures and the Resource Group's budget and Workplan.

D. Assessing workforce implications arising from your Resource Group’s Workplan

Structure and culture

Q Is the Unit’s culture, structures and systems appropriate for future business requirements?
- number of positions and levels
- job roles and position descriptions
- management skill and experience
- flexibility and responsiveness
- communication systems

Q Are there any changes in management or organisation structure planned?
- new or changing job roles
- staff promotions or turnover
- changed reporting relationships

Workforce composition

Q Is the current staff mix appropriate for future requirements?
- technical, administration, management etc
- continuing, fixed term, casual, agency and volunteer staff
- different areas of expertise

Q Does the staff composition provide effective administration support for the Group’s activities?

Q Are casuals and/or agency staff utilised appropriately for short term work or peak workloads?

Capabilities and roles

Q Are there any critical roles that are particularly difficult to fill or develop?

Q What changes to the capabilities of major occupational groups are appropriate or expected?
- revenue generation
- multimedia
- project management
- industry partnership development
Q Are the roles that carry out the core business now the same as what they will be in the future?

Q Have any critical capabilities shortages or surpluses been identified?
• generic administrative, technical, teaching
• research capability or grant application
• partnership development
• marketing
• project management

Q How will critical capabilities be developed?
• only available in the external labour market
• in the organisation at present
• training and development of existing staff
• shadowing, mentoring, higher duties, secondment or other development opportunities

Q Are there any skills that will become obsolete under future scenarios?

Career development and performance improvement
Q How can opportunities be provided to support career development of staff? Are there career paths for staff performing well? Are there development opportunities available for staff who have been in the same position for a long period of time?

Turnover and staff movements
Q Are there any foreseeable losses of key people (e.g., retirements) over the next 1 to 3 year period and what are the implications? Are there progression plans in place to ensure management positions or other critical roles can be filled or covered at short notice?

Q Are there sufficient strategies in place to manage contingencies and maintain continuity of quality service delivery, e.g., staff leaving, not being available? What succession planning and management strategies do you have in place?

Q What retention strategies do you have in place?

Q Are there any upcoming staff movements, e.g., staff returning from secondment, staff leaving, staff changing hours of work, staff taking extended leave, such as parental leave, long service leave, or leave without pay?

Q Are there staff turnover issues that need to be addressed?
• high employee initiated turnover
• rapid turnover
• reasons for employee initiated separations
• insufficient staff mobility in particular areas
**Workforce diversity**

**Q** Are there any particular groups of staff who are experiencing particular difficulties, e.g. women/men, part-time/casual, lower levels? Do all groups of staff have the same opportunities?

**Q** What problems could arise from the age distribution of the workforce?
- inadequate career opportunities
- blocked career paths
- high number of retirements
- too many or too few new recruits

**Q** What diversity and equity issues have been identified?
- workforce education
- mix of equity target groups
- compliance with legislative requirements
- recruitment and promotion rates

**Industrial relations**

**Q** What industrial issues have been identified?
- new enterprise agreements or changes to conditions of employment
- workloads
- new human resource policies and procedures
- compliance with legislative requirements

**Health and safety**

**Q** Are there any trends in health and safety incidents that need to be addressed?

**Q** What is the nature of any WorkCover claims in your area? Are there trends in nature of injuries or incidents or length of time for claims? How successful have return to work programs and rehabilitation been?

**Q** What occupational health and safety issues have been identified?
- responsibilities and accountabilities
- workforce education
- compliance with legislative requirements
- management of incidents
- number of incidents/claims
- workload and stress issues

**Leave**

**Q** Are there any trends in leave that impact on business objectives? Are there any absenteeism issues? Is there a significant leave liability that will need to be reduced in the coming year?

**Changes in operations**

**Q** How is the emphasis on the University’s different activities (eg. higher education, TAFE, research, industry links, domestic, international) likely to change?

**Q** What new products or services will be introduced?

**Q** What expansion of existing activities is planned?

**Q** What activities will be discontinued?
- conclusion of projects or consultancies
- organisational changes

**Q** Are there any new resources that will become available?
- structural changes
- new projects
Q What opportunities exist to use new technologies to improve service delivery? How will new technologies impact on the way work is organised or conducted?
- application of multimedia
- online learning and distance education
- business and information systems

Q What changes in operating methods or productivity improvements are planned?
- Different service delivery methods
- Changes to administrative processes
- Structural or technological changes

Q Are there any changes in administration, information or control systems planned that will impact on how work is organised?
- decentralisation or centralisation
- changes to delegated authorities
- technological changes
- process simplification
E. Workforce Plan
Having considered your workforce planning needs, list in priority order your 3 to 4 most important workforce planning issues for the coming year.

<table>
<thead>
<tr>
<th>Changes in business objectives or key activities planned</th>
<th>Strategies to address changing of workforce needs: recruitment, training &amp; development, retraining, redeployment, relocation, replacement planning, restructuring, union negotiations, redundancy, career planning, change management</th>
<th>Cost/resources</th>
<th>Target completion date</th>
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