



UNIVERSITY OF
CAMBRIDGE

Workforce Planning Toolkit

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What is workforce planning?

Workforce Planning is a process of analysing the current workforce, determining future workforce needs, identifying the gap between the present and the future, and implementing solutions so that you can achieve your operational and strategic plans. It is about ensuring that you have the right people, on the right contract, in the right place at the right time to fulfil the work and objectives you need to achieve.

What are the benefits of workforce planning?

Workforce Planning aligns an institution's needs with their workforce as well as with the University's People Strategy. A detailed understanding of your workforce enables you to take a proactive approach to managing and building diverse teams of talented staff to ensure you can deliver operationally and strategically against your institution's academic, financial and people plans.

	Workforce planning can inform...	...which in turn can lead to:
	Talent attraction, selection and management	Timely identification & responsiveness to changes in the external environment
	Role/job design	Recognition of skills gaps and areas of succession risk
	Skills and leadership development	Identification of strategies for talent management & people development
	Staff learning and development	Improved organisation L&D over time
	Reward and recognition	Targeted approach to reward and recognition
	Retention Management	Improved retention
	Performance Management	Targeting of specific and identified inefficiencies
	Work-life balance initiatives (e.g. flexible working and wellbeing)	Improved staff work-life balance
	Succession planning for key roles	Improved staff motivation and efficiencies
	Equality and diversity action plans and targets	More diverse and inclusive teams accessing talent from a more diverse recruitment pool

How to undertake workforce planning

Workforce Planning is a simple and practical process achieved through the following steps:



Throughout the rest of this document, detail is available on each step shown above, together with:

- some of the actions that might be relevant for each step
- questions that you might consider to inform your actions
- relevant tools and support that will enable you to take forward your workforce planning actions

STEP 1:

Understand where you are now



- Gather and analyse staff data e.g. headcount, retention, attrition, contract type, overtime, grades/pay rates, vacancies, leave arrangements i.e. sabbatical and research leave, upcoming retirements
- Know your current workforce: skills analysis, critical roles, performance, productivity, current vacancies
- Know your current operational and strategic data: student numbers, courses on offer, fees
- Assess internal and external strengths, weaknesses, opportunities and challenges faced e.g. competition for resources (e.g. SWOT or PESTLE analysis)

Questions to consider:

- What are your current retention and recruitment challenges?
- How clear / confident are you of future requirements and your ability to meet them?
- Do you have a clear operational, strategic, people plan?
- How do you currently manage your workforce planning?

Tools and Support Available:

- Annual Planning Round inputs / outcomes e.g. staff headcount / student numbers/ fees / risk registers / projects / income & expenditure / financial forecasts / operating budgets / resource allocation etc
- Academic Plan
- Financial Plan
- HR People Strategy / People Action Plan
- Athena Swan and Race Awareness Action Plan
- Organisation Structures
- Monthly / Quarterly “Dashboard” reporting
- Monthly departmental MI e.g. starters / leavers / vacancies
- Burst reporting
- Diversity reporting
- Staff Reviews & Development (SRD's) / Appraisals
- Institution / Department strategy & structure

STEP 2:

Define your future needs and ambitions



- Think of your immediate needs (i.e. the next year) and longer-term ambitions (i.e. the next five years)
- Identify issues and find solutions
- Review and consider institution and School plans
- Explore challenges and opportunities
- Make reasonable assumptions
- Apply financial planning round principles (e.g. % cost reduction)
- Strategic planning for stability and flexibility – the right skills, right size, right cost, right shape, right location
- Contingency planning
- Consider staffing arrangements i.e. hours worked, overtime costs, types of role: open-ended, fixed term, full-time, part-time, guaranteed minimum hours contract
- Undertake external benchmarking

Questions to consider:

- What areas will grow?
- What will slow / stop?
- New areas of investment (for example; research, teaching areas, partnerships, collaborations, etc.)?
- What will need delivering differently?
- Any external changes to respond to?
- Are there any labour market shortages that need factoring in?

Tools and Support Available:

- Institute and/ or School Strategy/Plan
- Departmental Budget / Financial Planning Round Inputs
- Workforce Policy
- Workforce Policy Guidelines
- Predicted student numbers
- Grant applications

STEP 3:

Identify what gaps you need to address to achieve your future needs and ambitions

- Identify the critical roles for the future (ideally put succession plans in place for these)
- Determine what skills and contributions will be needed
- Consider in which areas staffing will change (e.g. demographics)
- Review Departmental structure – how will this need to change?
- Consider what the workforce would look like if it reflected the diversity of students / wider community / other stakeholders. Are there diversity deficits or opportunities?
- Assess the impact on management and leadership
- Identify gaps and/or scenario plan future requirements considering recruitment, restructure, development, skills gaps, anticipated student numbers, work patterns, number of hours, predictability of hours, etc
- Consider reward strategies including regrading, support for promotion, contribution increments.

Questions to consider:

- Do I have the right staff in the right job on the right contract?
- Will roles need redesigning, and if so, which roles, where?
- Are the right capabilities in place to meet the needs identified?
- What development needs to be in place?

Tools and Support Available:

- PPD
- Leadership Training
- Organisation Change Policy
- Workforce Policy
- Workforce Policy Guidelines
- Reward

STEP 4:

Develop, communicate and implement an appropriate action plan

- Develop a plan, with targets and measures of success
- Define the key actions to be taken, people responsible and timescales, for example:
 - All resourcing managers to review role definitions and person specifications to ensure that they take account of the skills needed / diversity gap (All)
 - Develop, with HR, a workshop to surface behaviours needed etc. (HoD)
 - Establish new performance measures for department (Leadership team)
 - Create succession plan/development, build conversations into SRD's / appraisals with staff, and identify developmental needs (All Line Managers)
- Communicate, support and inform your managers
- Ensure mechanisms are in place to regularly review progress / outcomes

Tools and Support Available:

- Workforce Policy
- Workforce Policy Guidelines
- Decision Tree
- Organisational Change Policy
- Recruitment Guidelines
- PPD
- Guidelines for the Review of Casual Workers (Teaching)



STEP 5:

Monitor progress and evaluate

- Establish a regular process for monitoring and reviewing.
- Review impact to establish if what was proposed to be done has been done
- Assess whether the Workforce Plan is still valid and relevant
- Review impact & refresh activities
- Review strategies and evaluate their impact (positive & negative)
- Identify further change and actions required

Questions to consider:

- Have you achieved what you set out to achieve?
 - If not, why not?
 - If yes, how successful has this been?
- If yes, what could have been done differently? What lessons have been learnt?
- Is the Workforce Plan still valid and relevant?

Tools and Support Available:

- Monthly / Quarterly “Dashboard” reporting on casual worker usage
- Monthly departmental MI e.g. starters / leavers
- Data & Planning inputs – as per Step 1
- Annual Planning Round
- Annual HR Division Review (see Workforce Policy Guidelines provision)