

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

Agency/Department:		Submitter Name/Title:	
Director:		Submitter Phone:	
Address:		Submitter Email:	

## SCAN AND REVIEW

Please rank your department's development in workforce planning in the following areas:	BP	P	D	ME	E	HE	Comments:
The workforce planning objectives have active support from executive staff.							
The workforce plan is accessible and widely distributed throughout department.							
Workforce Planning Unit/Coordinator position is continuously staffed and funded.							
Managers receive training and understand their roles in the WFP.							
Aligns with department's strategic mission and goals.							
SWOT analysis has been completed and threat mitigation measures developed.							
Addresses external factors such as changes to legislation, technology, budget, etc.							
Has well established benchmarks/ performance objectives and deadlines.							

**Development Scale:** BP-Beginning Planning 0-15% P-Planning 16-29% D-Developing 30-49% ME-Mostly Efficient 50-60% E-Efficient 61-75% HE- Highly Efficient 76-100% **Please see scoring instructions on last page.**

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

Encourages networking with other state departments and establishing working relationships with control agencies.							
Personnel/EEO policies and practices align with workforce objectives and strategies.							

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

## ANALYSIS AND INTERPRETATION

Please rank your department's development in workforce planning in the following areas:	BP	P	D	ME	E	HE	Comments:
Collection and analysis of workforce data occurs at least biannually.							
Exit Interviews are regularly completed.							
Data is analyzed from exit interviews to address trends and opportunities for improvement.							
Entrance surveys are regularly completed.							
Data is analyzed from entrance surveys to address trends and opportunities for improvement.							
Anonymous employee job satisfaction surveys are collected annually for analysis.							
Position reviews occur yearly to ensure classification/job specification/duty statements align.							
IDPs and performance reports are being completed by Managers to ensure competency timely.							
Have established training schedule for key classifications within department.							
Training classes receive evaluations and are analyzed for improvement.							

**Development Scale:** BP-Beginning Planning 0-15% P-Planning 16-29% D-Developing 30-49% ME-Mostly Efficient 50-60% E-Efficient 61-75% HE- Highly Efficient 76-100% **Please see scoring instructions on last page.**

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

Identified competency and headcount gaps in key classifications affecting current and future needs.							
Analyze turnover, attrition, and transfer rates to determine classifications at risk.							

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

## DEVELOPMENT AND IMPLEMENTATION

Please rank your department's development in workforce planning in the following areas:	BP	P	D	ME	E	HE	Comments:
Consulted with Divisions to identify technical knowledge/skills/positions for future goals.							
Identified key positions affected by turnover, attrition, and transfers.							
Implemented strategies to attract skilled workforce.							
Implemented strategies to retain valued employees.							
Implemented executive mentorship program.							
Management /Supervisors provide mentorship to feeder classes.							
Managers/Supervisors are trained in mentorship classes.							
Positions have been identified for flexible work opportunities such as telecommute, alternative work schedule, etc.							
Timeframes/responsible persons/ performance indicators are clearly identified and attached to each strategy in WFP and reported through shared report.							

**Development Scale:** BP-Beginning Planning 0-15% P-Planning 16-29% D-Developing 30-49% ME-Mostly Efficient 50-60% E-Efficient 61-75% HE- Highly Efficient 76-100% **Please see scoring instructions on last page.**

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

## SUCCESSION PLANNING

Please rank your department's development in workforce planning in the following areas:	BP	P	D	ME	E	HE	Comments:
Key classifications for upcoming retirements have been fully identified.							
Organizational Charts are detailed and kept current (reviewed and updated every 3 months).							
Management team are all trained to identify talent within the department.							
Management team assists feeder classes in professional development (practical and educational).							
Based on exit survey results retention strategies have been implemented and met benchmark for success.							
Retired Annuitants are utilized by department for the sole purpose of providing the following: Instruction/Teaching/Mentoring/ knowledge transfer or limited term assignments that result in verified cost savings.							
Desk Manuals or standard operating procedures have been developed for all key positions where appropriate.							
Recruitment efforts have met benchmark for success.							

**Development Scale:** BP-Beginning Planning 0-15% P-Planning 16-29% D-Developing 30-49% ME-Mostly Efficient 50-60% E-Efficient 61-75% HE- Highly Efficient 76-100% **Please see scoring instructions on last page.**

# WORKFORCE PLANNING EVALUATION ASSESSMENT TOOL

## SCORING INSTRUCTIONS

To score your Workforce Plan utilize the Development Scale located in the footer for each page. Examples for scoring are below:

The workforce planning goals have active support from executive staff – Active Support means sponsorship, participates in training, and leads the elements of the overall workforce plan and its objectives. Score the question according to what the percentage of executive staff meet this criteria.

Exit Interviews are completed regularly- If 50% of your management team is completing the exit interviews and collecting this data you would score ME- Mostly Efficient 50-60%.

Continue to rate each question accordingly. Remember to do an honest evaluation, as this will help you identify opportunities to strengthen you workforce plan.

## RESULTS

The goal in utilizing this assessment tool is to assist you in identifying areas of weakness in your workforce plan and to assist you in developing strategies to mitigate potential risks. If you have suggestions for improving this assessment tool, please provide any feedback or suggestions for improvement to: Statewide Workforce Planning and Recruitment Unit (SWPRU) at [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov).

Please submit a copy of your completed assessment tool to [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov). SWPRU will utilize the results of these assessment tool results to identify upcoming training opportunities and the needs for additional development tools.

Thank you for your participation in statewide workforce planning efforts.