

Workforce Plan Checklist

What is the Workforce Plan Checklist?

The Workforce Plan (WFP) Checklist is a tool for identifying key tasks essential to a successful workforce plan. It helps organizations and CalHR evaluate the workforce planning efforts by identifying:

- **Success Factors:** Determine what helps or hinders WFP's completion.
- **Skill Gaps:** Identify knowledge and skill gaps for competency development.
- **Compliance:** Ensure alignment with regulatory requirements.

When should we use the Checklist?

The organization can use the Checklist when they are creating and evaluating their WFP. CalHR ensures compliance through an annual survey and collects WFPs each July to confirm adherence to these standards.

Who should use the Checklist?

The workforce planning steering committee, or individual(s) involved in workforce planning for an organization, should utilize the Checklist.

Why use the Checklist?

The Checklist supports a structured approach to workforce planning, ensuring that plans align with organizational goals, support effective staffing, mitigate risks associated with workforce changes, ensure compliance.

How to use the Checklist?

1. **Review WFP Policy Requirements:** Review the items in the first column to check if the WFP includes each policy requirements/deliverable listed.
2. **Mark Off Policy:** Tick off items the plan meets in the second column.
3. **Repeat as Needed:** Continue evaluating until all policy requirements/deliverables are met for a complete WFP.

Note: *The Workforce Plan Checklist assesses plan completeness, not strategy effectiveness. Each strategy should include key performance indicators to evaluate the effectiveness of the plan.*

For Assistance: Contact CalHR's Statewide Workforce Planning Unit at wfp@calhr.ca.gov with any questions or feedback on the Checklis

Organization:

Plan Date:

Reviewer:

Date Reviewed:

Policy requirements	Included	Notes
1. Strategic Alignment Description of how plan(s) aligns with strategic goals and any workforce-related risk controls indicated in SLAA report	<input type="checkbox"/>	
2. Competency Model Identification of competency model.	<input type="checkbox"/>	
3. Gap Analysis Identification of current and future gaps between the staff and competencies that exist (supply), and the staff and competencies needed (demand) and how each gap was determined and strategies to address the gaps identified.	<input type="checkbox"/>	
4. Underutilization Plan Underutilization Plan for any areas of underutilization as identified in Annual Workforce Analysis (WFA).	<input type="checkbox"/>	
5. Action Plan Implementation of an action plan with solutions for addressing current and future workforce gaps that includes the following: <ul style="list-style-type: none"> • Strategy description • Alignment with strategic, WFA, and any Underutilization Plan goals • Timeline for implementation • Key Performance indicators • Success Criteria 	<input type="checkbox"/>	
6. Evaluation Process Process and timeline to evaluate the WFP's effectiveness for accomplishing planned outcomes.	<input type="checkbox"/>	
7. Current Plan Current plan covering no more than a five-year span, unless otherwise strategically aligned with enterprise goals.	<input type="checkbox"/>	
8. Approval Signature of Department Director	<input type="checkbox"/>	