



Government of **Western Australia**
Department of **Local Government**

WORKFORCE PLANNING | The Essentials

A toolkit for Western Australian local governments



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Prepared by the Department of Local Government
August 2012

Department of Local Government

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This document is available in alternative formats, please visit the Integrated Planning and Reporting website or contact the Department.



Australian Government

This publication was produced with assistance from the Australian Government Department of Regional Australia, Local Government, Arts and Sport's Local Government Reform Fund

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Foreword

It is my pleasure to introduce the Workforce Planning Toolkit for local governments in Western Australia.

Local governments face increasing and diverse challenges in providing local services and facilities for their communities. To meet these challenges, local governments will need to have staff with appropriate knowledge, skills and expertise. Skills shortages in the local government sector and other sectors in this State and across Australia have highlighted the need for a concerted Workforce Planning effort.

For these reasons, Workforce Planning is a key component of the Integrated Planning and Reporting Framework which was introduced to Western Australian local governments during 2011, underpinned by regulatory amendments. Together with Strategic Community Planning, Asset Management and Long Term Financial Planning, it forms part of the Integrated Planning and Reporting Framework.

Integrated Planning and Reporting in Western Australia is consistent with a national approach to local government sustainability, including the National Assessment Framework.

This toolkit has been developed to assist local governments in reviewing their current workforce and in identifying future needs.

Workforce Planning involves council and all employees of a local government and is an important part of every manager's role in the organisation. Others, such as unions and professional associations, are also key stakeholders in supporting and assisting workforce development. Ultimately, workforce planning becomes an integral part of the planning and operations in a local government.

I would like to acknowledge and thank the Human Resources and Change Management Working Group for their contribution to the development of resources for the sector in this important area.

Workforce Planning brings important benefits to local governments and their communities and I look forward to seeing these come to fruition as it is put in place.



Hon G M (John) Castrilli MLA

MINISTER FOR LOCAL GOVERNMENT; HERITAGE; CITIZENSHIP AND MULTICULTURAL INTERESTS

INTRODUCTION

Purpose of the toolkit

This toolkit was developed to introduce local governments to Workforce Planning by posing key questions and providing the tools to get started.

This resource will assist local governments to:

- review and develop their workforce to meet community aspirations identified in the Strategic Community Plan in the best possible way, and
- meet the requirements of Strategic Community Plans and Corporate Business Plans.

A basic approach to Workforce Planning is outlined in this toolkit, setting out the main elements and what is involved with implementing these.

Approach taken in toolkit

This toolkit contains:

- four sections, colour coded, each relating to a step in the Workforce Planning process
- considerations, questions and tips to guide thinking and planning
- practice examples with links to workforce plans developed by local governments
- a checklist at the end of each step and a final checklist to capture all actions achieved, and
- references to other workforce planning guides and related information.

The toolkit will assist local governments with:

- developing and implementing Strategic Community Plans and Corporate Business Plans
- identifying performance outcomes, and
- achieving workforce planning performance measures.

This toolkit sets out the main elements of Workforce Planning and how to get started

What is Workforce Planning

“A continuous process of shaping the workforce to ensure that it is capable of delivering organisational objectives now and in the future.”

(Australian National Audit Office (ANAO) 2004)⁷

The above definition highlights the key elements of Workforce Planning.

Workforce Planning:

- is continuous, not a one-off activity
- is a process, not a static action or set of actions
- is about shaping the workforce with a clearly identified purpose and to bring about particular changes
- has its purpose linked with organisational objectives, and
- applies not just to the current workforce but anticipates future workforce requirements.

A note about skills and capacity

“While an organisation needs high-performing people with desirable knowledge, skills attributes and behaviours, it is equally important to enhance capabilities that will support broader strategic goals.

Organisational or corporate capacity involves an organisation's capacity to effectively meet its business objectives. The factors that contribute to corporate capability include culture and values, business processes and management systems, work organisation and the ability of individual employees. Taking an organisational perspective of the workforce can help to ensure that capabilities are embedded in the practices, processes, systems, culture and technologies of the agency. Ideally, these capabilities will remain with the agency despite staff turnover.”

(ANAO, and Hamel and Prahalad, in Premier's Department of New South Wales, 2003, Workforce Planning: A Guide, p.19)

Benefits of Workforce Planning⁶

Workforce Planning enables your local government to:

- respond quickly and more strategically to change by recognising emerging challenges
- improve efficiency, effectiveness and productivity by having employees with the right knowledge and skills and who are a good fit for the job they are in
- facilitate strategic staffing and planning for future workforce requirements by identifying these in a timely manner, monitoring staff separations and making arrangements to fill key vacancies
- strengthen your organisation's capacity to achieve the outcomes of the Strategic Community Plan and Corporate Business Plan
- encourage understanding of your organisation's workforce profile so that existing workforce capacity can be maximised and the future workforce shaped as needed
- assist with identifying and managing people with the knowledge critical for efficient and effective business operations, and managing corporate memory
- adapt and integrate management and business processes, technology and systems and adjust organisational structure to use resources most effectively
- monitor costs and directly link workforce expenditure against business outputs and outcomes, and
- strengthen the local government industry through stronger career paths and staff development.

Maximise the capacity of your organisations workforce and respond to challenges through Workforce Planning



Who should be involved in Workforce Planning?

It is important that Workforce Planning involves the council, all employees and other stakeholders, including unions and professional organisations.

It is also important that Workforce Planning is an integral part of the management and operations of your local government so that:

- council policy and decision making supports Workforce Planning, ensuring that workforce considerations are included in all strategic community planning, corporate business planning, reports and proposals to council and structured monitoring and reporting of outcomes
- managers include workforce considerations as an integral part of all areas of the local government's operations for which they are responsible, and
- all employees have the opportunity to participate in and contribute to the Workforce Planning process at all stages.

Ongoing communication about Workforce Planning across the whole organisation and with stakeholders is essential as:

- employees need to know what is happening, how this may affect them and what opportunities there may be in the future
- all negotiations regarding industrial relations matters need to be undertaken within the context of workforce review and future planning
- professional associations can assist the process through professional development initiatives and support for individuals through mentoring and advice on career opportunities and development, and
- associated service providers, including those working with local governments on Workforce Planning and systems development, will require knowledge and understanding of workforce planning and implementation.

Workforce Planning involves all levels of the organisation, including Council and associated service providers

Workforce Planning and Integrated Planning

Workforce Planning is one of the four key components of the Integrated Planning and Reporting Framework and Guidelines now in place across the local government sector in Western Australia.

At the strategic level, your local government's Workforce Plan will take into account the community aspirations, priorities and objectives identified in your Strategic Community Plan. The Strategic Community Plan sets out the longer term vision for your local government and will highlight workforce needs.

The Workforce Plan will then become an essential component of the Corporate Business Plan of your organisation, where it will identify workforce requirements and strategies for current and future operations over the next four years or more.

The linkages of the Workforce Plan with both your Strategic Community Plan and Corporate Business Plan are shown in the diagram below.

Elements of the Integrated Planning Framework



Figure 1. Elements of the Integrated Planning and Reporting Framework.

Workforce Planning for the future

The scope of Workforce Planning for Western Australian local governments encompasses:

- The whole organisation and sector
- State regulatory requirements and processes, and
- National sustainability programs and funding.

Comprehensive Workforce Planning has not traditionally been undertaken in local government in this State. It is acknowledged that individual local governments have varying capacity to undertake Workforce Planning and that there will be a gradual process of implementation over the next several years.

It is expected that your Corporate Business Plan would be supported by and integrated with your Workforce Plan.

This toolkit provides guidance and direction for the implementation process.

TIP: Other resources and material are available on the Department of Local Government's Integrated Planning and Reporting website at <http://integratedplanning.dlg.wa.gov.au>

Four steps of Workforce Planning

There are several steps that are common in most Workforce Planning guides. For the purpose of this toolkit, these have been broken down into four steps.

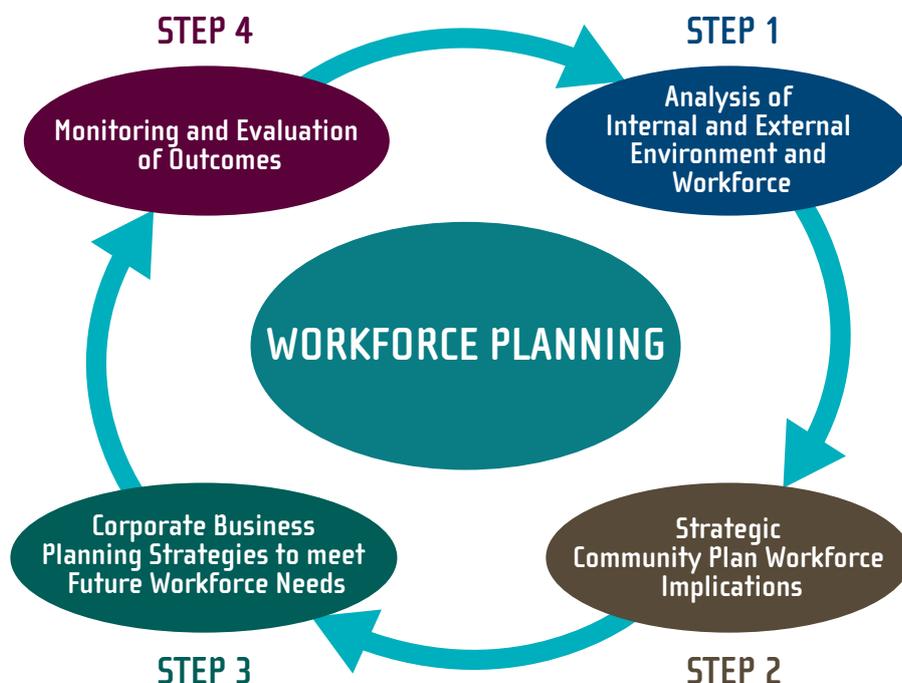


Figure 2 . The four steps of Workforce Planning covered in this toolkit.

Workforce Planning steps

At each step your local government should ask itself a number of questions and consider key areas. This toolkit will look at these in more detail. Your Workforce Plan should be developed against these areas.

STEP 1: ANALYSIS OF INTERNAL AND EXTERNAL ENVIRONMENT AND WORKFORCE

Where are we now?

- Knowledge and understanding of your local government
- Knowledge and understanding of the external environment
- Current organisational structure
- Current workforce
- Analysis of workforce data
- Financial analysis of total workforce costs
- Current risks associated with carrying out the business of local government

STEP 2: STRATEGIC COMMUNITY PLAN WORKFORCE IMPLICATIONS

What are the workforce implications of our Strategic Community Plan?

- Outcomes of community consultation and clarity of community expectations
- Strategic Community Plan vision, priorities and objectives
- Analysis of gaps, issues, risks which have workforce implications
- Current and future operating environment

STEP 3: STRATEGIES TO MEET FUTURE WORKFORCE NEEDS

What strategies can we put in place to meet future requirements?

- Policies and processes which support integration of workforce considerations across the organisation?
- How do you deliver services and facilities, structure your workforce?
- Corporate Business Plan and Workforce Planning actions
- Performance measure indicator information
- Organisational and workforce development, cost modelling and workforce supply, ongoing monitoring processes
- Developing workforce resources

STEP 4: MONITORING AND EVALUATION OF OUTCOMES

How do we know when we have achieved the objectives of the Strategic Community Plan?

- Have you delivered Workforce Planning and Strategic Community Plan outcomes including agreed community expectations?
- Have you achieved / made progress towards planned outcomes for the workforce and organisation?
- What progress have you made against performance measurement indicators?
- Has there been a reduction against risk indicators?

STEP 1: ANALYSIS OF INTERNAL AND EXTERNAL ENVIRONMENT AND WORKFORCE

To commence the process, a local government should ask *where are we now?*

Looking in depth at the following key areas will assist a local government to analyse its internal and external environment and workforce:

- Knowledge and understanding of your local government
- Knowledge and understanding of the external environment
- Organisational structure
- Current workforce
- Analysis of current workforce data
- Financial analysis
- Current risks associated with the business we are in.



In this section you will gain an understanding of how to:

- Undertake an environmental analysis
- Prepare an organisational chart
- Collect and collate workforce data and develop a workforce profile
- Identify gaps and risk areas, and
- Undertake financial analysis.

Key considerations and questions to ask

Knowledge and understanding of your local government

- This area might include historical expectations and ways of working as well as more recent changes in the demands for your local government's services and regulatory requirements.
- What are the expectations of your community regarding the provision of services and facilities by your local government and its role in providing for the well-being and good governance of the community?
- What are the current priorities for your local government and why?
- How well do you think your local government is carrying out its roles and responsibilities?
- What challenges are there for your local government?
- What are the values of your local government and how would you describe the culture of your organisation?
- How would you describe the relationship between your local government and external stakeholders? What is the purpose of these relationships and how important are they for the work of your local government?
- Is your current workforce able to deal with current demands?

Knowledge and understanding of the external environment

- What is the employment market?
- Who is competing for your workforce?
- What external impacts are there on your local government? These could include policy and legislative change, local and regional development and changes in population demographics.
- How are they affecting your local government?
- Does your local government have the strategy and/or capability to address these?
- Do they have implications for your workforce?

TIP: Useful sources of demographic information include the Australian Bureau of Statistics, Regional Development Commissions and Regional Development Australia.

Organisation structure

- What does your organisation structure look like?

TIP: Include a diagram of the structure in your Workforce Plan at this point.

- Does the structure support efficient and effective outcomes?
- Is there a need to change the structure to better reflect work priorities and better utilise workforce knowledge, skills and expertise to meet the requirements of your Strategic Community Plan? What would the new structure look like?
- Is there a need to adjust management and work processes and systems for greater effectiveness and efficiency?

Current workforce

Does your local government have readily available information regarding your workforce?

Useful categories for data collection are outlined below.⁵

Job characteristics (skills and occupation)	Workforce size and location	Individual characteristics (demographics)
<ul style="list-style-type: none"> • Salary rates and on-costs • Hours of work • Overtime hours/flex hours • Hours worked by casual employees • Hours worked by contract employees • Leave liabilities • Awards/agreements • Employment mode (full-time/part-time) • Employment status (permanent, temporary, casual, contract) • Occupations • Qualifications • Skills/capabilities • Training • Job location 	<ul style="list-style-type: none"> • Number of employees – headcount and full-time equivalent • Number of short term staff (temporary/casual/contract, etc) • Staff location 	<ul style="list-style-type: none"> • Age profile • Gender profile • Other EEO factors profile • Length of service • Grades/classifications of employees • Recruitment and retention rates

Table 1. Data collection categories

Analysis of current workforce data

How can your local government use workforce data to identify issues and trends?

TIP: Useful analyses include:⁵

- Separation rates
- Mobility within the organisation
- Turnover rates
- Retention rates
- Vacancy patterns
- Retirement patterns
- Promotion patterns
- Workload patterns
- Leave patterns – sick leave, long service leave, family and parental leave
- Time taken to recruit
- Skills shortage and oversupply
- Achievement of EEO targets
- Wages and salary costs, turnover costs
- Exit interviews
- Employee perception survey
- Customer service surveys

Example of data analysis

The City of Wagga Wagga in its Workforce Plan 2012-2014 provides an example of a comprehensive analysis of workforce data. The analysis includes the following:

Internal workforce

- Permanent workforce employee distribution across the directorates of the organisation
- Full time and part time employees by gender
- Profile of part-time employment within the organisation by age and gender
- Permanent workforce distribution by age and gender
- Casual workforce distribution by gender and age
- Permanent workforce generation distribution (Generation Y, Generation X, Baby Boomers and Veterans)
- Casual workforce generation distribution (Generation Y, Generation X, Baby Boomers and Veterans)
- Maternity leave data over a two year period
- Breakdown of employee exits or separations by reasons during 2009
- Employee exit comparisons 2007, 2008, 2009
- Employee entry comparison 2007, 2008, 2009

External profile

- age
- population diversity
- unemployment data
- employment by occupation
- local government area workforce distribution by age
- local government area workforce generation distribution (demographic) by gender and age
- comparison of workforce generation distribution in area and the local government by age
- local government area work patterns (full-time and part-time)
- comparisons of female and male work patterns, in the area and in the local government
- population ageing data and possible future impacts on the local government

For a comprehensive example of workforce data analysis, see pages 6 to 20 of the City of Wagga Wagga's Workforce Plan available at www.wagga.nsw.gov.au

A note about the collection and collation of data

It is recognised that many local governments do not have readily available workforce data and that there will be some resourcing requirements as information will need to be collected and entered into a data collection system.

In country areas, several local governments could partner to share a resource person to undertake the task of data collection and input, and analysis.

Data already collected for Equal Employment Opportunity planning and reporting will be directly relevant.

DIVERSITY IN YOUR WORKFORCE

What does your workforce data tell you about the diversity of your workforce?

Do you have or have you considered:

- Aboriginal employment program and initiatives
- Development opportunities for staff who would like to progress their careers into senior offices positions
- The ageing of your workforce, maximising the opportunity to draw on the knowledge and skills of your older members of staff, providing re-training opportunities and including succession planning in your Workforce Plan
- Ways of encouraging young people to join and remain in your workforce
- The contribution which people from various cultural groups are able to make in your local government and in the provision of services and facilities for the local community.

STEP 1 Checklist

Analysing the Internal and External Environment and Workforce⁵

What does your current workforce look like?

-
- Is key demographic data available to develop a profile of the current workforce. Is workforce data collected on an ongoing basis?
-
- What patterns are evident from the workforce data and are they uniform across the local government?
-
- Is the current workforce profile used as a baseline against which future changes in the workforce can be analysed?
-
- How does your local government's workforce compare with that of other similar local governments? What causes these differences?
-
- Have key quantitative and qualitative indicators been developed? For example:
- Cost of recruitment (quantitative)
 - Retention of new recruits (quantitative)
 - New recruitment satisfaction (qualitative)
 - Reasons for leaving (qualitative)

External sources of workforce

-
- Is information available about relevant external sources of staff – whether experienced people are available, whether the local government can recruit competitively, whether temporary and contract workforce is available and at what cost?

What will your workforce look like in the future?

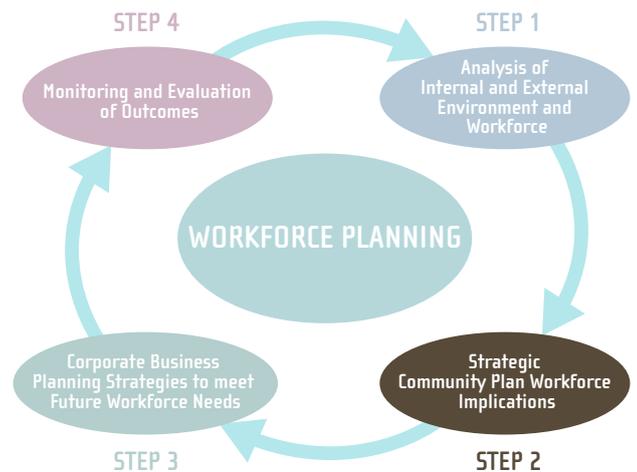
-
- What will the workforce profile be if no changes are made to current workforce practices?
-
- What trends or patterns are evident from the workforce data?
-
- Do workforce trends reflect the diversity and demographic features of your local and broader community?
-
- Have future community demographics been considered?
-
- What are the expectations of the different generations?
-
- Will changes in the industrial and other external environments affect the external workforce availability?

STEP 2: STRATEGIC COMMUNITY PLAN WORKFORCE IMPLICATIONS

What are the workforce implications of your Strategic Community Plan?

Looking at the following areas will assist your local government to assess the workforce required to deliver the Strategic Community Plan:

- Outcomes of community consultation and clarity of community expectations
- Strategic Community Plan vision, priorities and objectives
- Analysis of workforce gaps, issues, risks
- Current and future operating environment.



In this section you will gain an understanding of how to:

- Identify community expectations
- Identify implications and priorities of the Strategic Community Plan
- Identify gaps, risks and issues, and
- Identify the impacts of the current and future environments.

Key areas to consider and questions to ask

Strategic Community Plan Outcomes

- What are the outcomes of community consultation undertaken for the development and review of your Strategic Community Plan? Have you identified future priorities arising from this?
- Are these likely to involve skills gaps, shortages or oversupply in terms of your current workforce?
- Are there future demands arising in the external environment that your local government is already aware of and may impact on your future workforce?
- How is/will your local government address the workforce implications of these and others' demands which may emerge?
- Have you considered alternative action if your workforce is not available? Eg. Part time consultants
- Have you used your workforce profile information to enable you to develop plans to meet anticipated challenges and to minimise future costs?

Analysis of workforce gaps, issues and risks

Situation analysis⁵

A situation analysis is a series of questions that will stimulate thinking about potential workforce issues and point to strategies, for example:

- What skills are vital? What skills are no longer needed? What new skills are needed?
- What recruitment, training and retention strategies are under way? How are skills imbalances (due to attrition, retirement, etc.) over the next four years being addressed?

- Are people in the right place for the type and volume of work?
- Is there a proper balance of managerial, professional/technical and support staff in different groups?
- Will there be the right mix to ensure a diverse workforce to provide services to a diverse community?
- Is there excessive or very low turnover in any one group and what are the underlying reasons?
- Does your organisation have cost modelling processes in place?
- What business practices or processes need to be changed?
- How can structural, technological and processing improvements be used to address the skill requirements or to make your organisation more efficient?
- What barriers (statutory, administrative, physical or cultural) are there to creating the desired workforce profile?
- What other gaps or issues are there?
- What are our workforce management successes?

Demand / Supply analysis

The following demand/supply analysis diagram may be useful in bringing relevant information together:⁵

CURRENT POSITION	Current supply of staff and skills Adequacy of current supply sources	Demand for staff and skills based on current needs	Current shortfalls that have not been addressed can be included
FUTURE POSITION	Projections of staff numbers, capabilities and skills likely to be available if no additional action is taken	Future environment scan (scenario) Future demand for services and other organisational “drivers” Future demand for staff numbers, capabilities and skills Organisational capabilities	Difference between what will be demanded in the future and likely staff numbers, capabilities and skills What needs to be done to achieve desired capability?
COMPARISON	Compare supply with demand, now and in the future. Define gaps, issues and set priorities.		

Table 2. Demand/Supply Analysis

TIP: Another approach to gap and risk analysis is to ask the question:⁶

What gaps in knowledge and skills, positions and employees currently exist in the workforce that will need to be reduced or removed to achieve the future vision of your organisation?

Then:

- Identify and analyse the gaps (ie differences between supply and demand)
- Prioritise areas for action, based on the assessment of risk associated with each gap, and
- Identify potential directions for action.

Prioritising gaps

In prioritising gaps or considering areas where there are more employees than will be needed in the future, determine which are the most critical to your local government to support the delivery of Strategic Community Plan outcomes and Corporate Business Plan priorities. Also consider the reasons(s) for a gap(s).

Key questions for prioritising work include:

- Which are the most critical gaps for your organisation in terms of achievement of future requirements?
- Which gaps are related to operational short-term issues?
- Which gaps are related to strategic long-term issues?
- What are the risks associated with each gap?
- What would happen if the gaps are not addressed? How is it likely to happen?
- Which risks are acceptable to the organisation and which are unacceptable?

Key questions for identifying the reason for the gap include:

- Does your local government's workforce currently have the anticipated future knowledge and skills?
- Is the number of employees with the critical knowledge and skills adequate?
- Are critical knowledge and skills available in other positions within the organisation?
- Are there "feeder" positions for this critical knowledge and skills?
- What job functions or knowledge and skills will no longer be required?

Current and future external operating environment

Areas to consider here include:

- Labour markets/skills shortages
- Alternative labour markets eg overseas recruitment, through immigration
- Political, economic, social, technological, environmental, legal requirements / implications
- Competitors for workforce
- Demographic profile of your operating environment.

TIP: The Department of Education, Employment and Workforce Relations provides a range of labour market information through the Labour Market Information Portal (LMIP). It includes information by State and by region.

The information can be found at <http://www.deewr.gov.au/LMIP/>

Risk

Based on your findings to these and other questions and information, gaps or negative findings that represent a potential risk to the organisation can then be highlighted and response strategies explored. Completing a risk assessment of the gaps enables your local government to identify strategic high risk areas. All significant risk factors that could prevent the successful achievement of your organisation's objectives and performance measures can then be understood and managed.

The risk management standard currently in place is AS/NZS/ISO 31000: 2009 (Australia / New Zealand Standard / International Organization for Standardization 31000: 2009).

The below is extracted from the risk management standard:

Risk Management Principles and Guidelines (Page 1, Section 1)

2.1 Terms and definitions

Risk: Effect of uncertainty on objectives

Note 1: Effect is a deviation from the expected – positive or negative

Principles (Page 7, Section 3)

(b) Risk management is an integral part of all organisational processes.

Risk management is not a stand-alone activity that is separate from the main activities and processes of the organisation.

Risk management is part of the responsibilities of an organisation and an integral part of all organisational processes, including strategic planning and all project and change management processes.

Example identification of risk

The City of Wagga Wagga undertook a comprehensive identification of risks facing its organisation in its Workforce Plan 2010-2014. Local governments may find this example useful in undertaking their own risk identification process.

See pages 36 to 39 of the City of Wagga Wagga's Workforce Plan 2010-2014, available at **www.wagga.nsw.gov.au** or via the Department of Local Government's Integrated Planning and Reporting Website at **<http://integratedplanning.dlg.wa.gov.au>**

Potential sources of risk

Local governments should consider the following areas that may present a risk to the organisation:⁸

- Insufficient workforce data limiting the ability to plan fully and effectively
- Workforce not reflecting sufficient diversity
- Reputation risk associated with the quality and quantity of staff
- Inability to achieve strategic goals
- Inability to achieve operational goals
- Inefficient, ineffective management of human resources
- A workforce that is inflexible and does not have the necessary capabilities to deliver future services necessary for the organisation to achieve its goals
- An inability to attract and retain high quality staff
- Learning and development resources being allocated to activities which do not support the strategic goals of the organisation
- Under-utilisation of staff
- Increased staffing costs
- Loss of corporate knowledge as a result of key staff departures
- Increased reliance on a contingent work force
- Uncompetitive remuneration structures
- Inability to meet community and/or government expectations regarding provision of services
- Lack of preparedness for operating contingencies
- Inability to plan (adequately) for associated capital and operational expenditure
- Inability to adapt to new or changing conditions
- Inability to match staff with changing work requirements
- Lack of induction for new staff, resulting in lack of understanding of the local government environment.

Workforce Planning is a key
component of Integrated Planning

STEP 2 Checklist

Assessing the workforce implications of the Strategic Community Plan

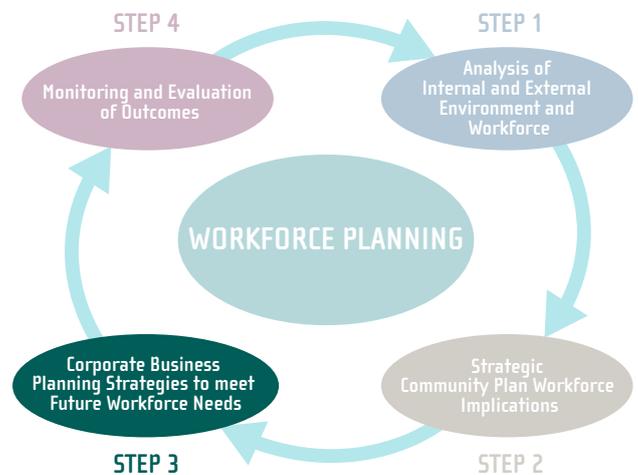
-
- What are the current gaps between workforce supply and demand and what is the nature of the gaps?
-
- Does the workforce profile vary across the organisation and between definable employee groups? Are these differences acceptable? Do they suggest that there are potential problems in particular work areas?
-
- Does any particular work area have excessive or too little turnover? Are there sufficient replacement staff numbers to cover separation and growth?
-
- Is there a proper balance of managerial, professional/technical and supporting staff in each work area?
-
- Are age patterns unbalanced in any work area or employee group, which might suggest high future attrition? Are there any skill shortages?
-
- Does your local government have the right numbers of people at the right level for the type and volume of work? Are there any skill shortages?
-
- Are there significant performance problems in any area?
-
- What are the likely future gaps between the availability of staff and future requirements?
-
- Have workforce issues that may affect the delivery of Strategic Community Plan and Corporate Business Plan outputs and outcomes been addressed?
-
- Does your local government need to alter its workforce practices to meet future operational and other requirements?
-
- What skills will your local government need in the future that it doesn't already have? What skills does your organisation have now that will not be needed in the future?
-
- How will your local government address the future skill imbalances due to attrition, including retirement, over the next five years?
-
- Will your local government have the right employment mix? What might impede your local government's ability to recruit and retain a high-quality, diverse workforce?
-
- Has your local government identified, prioritised and determined how risks associated with your workforce, current and into the future, will be managed?
-
- What aspects of the external environment are impacting on your operations, in what way and how can you address these?

STEP 3: STRATEGIES TO MEET FUTURE WORKFORCE NEEDS

What strategies can we put in place to meet future requirements?

Looking at the following areas will assist your local government to determine the strategies needed to meet future requirements:

- Does your local government have policies and processes which support integration of workforce considerations across the organisation?
- How do you deliver services and facilities, and structure your workforce?
- Corporate Business Plan and Workforce Planning actions
- Performance measure indicator information
- Organisational and workforce development, cost modelling and workforce supply
- Developing workforce resources.



In this section you will gain an understanding of how to:

- Put in place policies and processes to support future workforce requirements
- Review the organisation structure for service delivery and determine changes to meet future requirements
- Determine organisational and workforce strategies for each area of the organisation and determine risk mitigation actions
- Determine cost modelling and workforce costing, and budget for each area of the organisation
- Determine outcome/ performance outcomes
- Develop a business case, and
- Incorporate Workforce Planning and resourcing into your Corporate Business Plan.

Flexible work solutions expand your workforce and give your local government a competitive edge

*The following Executive Summary from the Richmond Valley Council Workforce Management Strategy 2011-2015 illustrates a clear statement of policy and the importance of the workforce.
View a full copy of the plan at: www.richmondvalley.nsw.gov.au*

Extract from the Richmond Valley Council Workforce Management Strategy 2011- 2015

EXECUTIVE SUMMARY

A strong, diverse, committed and motivated workforce is at the core of any successful business. Getting the right people into the right jobs is paramount and requires a commitment to attract, develop, retain and recognise talented and motivated employees who are aligned with our Vision and Values.

We are a multi-faceted organisation, with a significant number of functions and operations.

Accordingly, we require a diverse workforce that is capable of delivering positive outcomes for the organisation and to help us grow the local government area.

We are however faced with many challenges; these include potential skills shortages in specific occupations, a large proportion of our existing workforce nearing retirement and recruiting the next generation of skilled specialist staff.

Council is taking a proactive approach in this regard through the use of traineeships and support for professional development in a range of specialist areas.

Through our Workforce Strategic Plan, we're focused on attracting and retaining quality people, including trainees, and in investing in developing our leaders and recognising and rewarding our high performers.

We need to take our people with us to create the 'fit for the future' that we need to deliver our communities' priorities. We need to involve our staff and support them in learning new ways of working.

This Workforce Management Strategy aims to support Richmond Valley Council in achieving the skilled, motivated, flexible and diverse workforce it needs to deliver value for money services that make a difference to our local community.

Brian Wilkinson
General Manager

Col Sullivan
Mayor

Workforce policy and processes

Does your local government have an overview of Workforce Planning or a workforce policy, endorsed and actively supported by council?

Are workforce considerations included in all Strategic Community Planning, Corporate Business Planning, reports and proposals to council, and in the monitoring and reporting of outcomes?

TIP: Have you considered:

- **Developing an overview of Workforce Planning / a workforce policy for your local government?**
- **Putting in place procedures, proformas for reports and project proposals and other processes to support the inclusion of workforce considerations at the operational and strategic level across all areas of your local government?**

Strategy development

Developing strategies involves the planning and design of specific programs and projects that will enable the organisation to develop and maintain a workforce capable of delivering upon the organisation's objectives.

Specific activities undertaken in strategy development include:⁶

Strategy formulation

Establishing the case for change, and

Establishing success criteria.

Strategy development involves:

Identifying the most critical gaps and strategies for addressing first

A combination of short term and longer term strategies to address gaps between the current workforce and future workforce requirements, and

Strategies and action plans which specify what is going to be done and when.

Strategies to address workforce planning issues can include:

Improving attraction and retention strategies

Improving workforce availability

Increasing investment in development

Improving employment flexibility

Improving workforce governance and capability

Improving participation, retention and organisation culture.

(Source: State Services Authority Victoria, Workforce Planning Toolkit, 2006 pages 5, 26)

Example strategies to meet future workforce requirements

STRATEGY	ACTIVITIES
1. Improving attraction and recruitment strategies	<ul style="list-style-type: none"> • Employment branding initiatives • Better understanding of the Employer of Choice approach • Improving recruitment and selection methods
2. Improving labour supply	<ul style="list-style-type: none"> • Increasing the attractiveness of study for selected courses • Skilled migration • Increasing community involvement in the provision of services • Developing partnerships with other local governments / organisations to access a different workforce pool
3. Increasing investment in development	<ul style="list-style-type: none"> • Understanding the return on investment of learning and development interventions • Developing an understanding of skills critical to achieving Strategic Community Plan objectives • Improving succession management capability • Developing a knowledge management approach • Creating room for learning
4. Promoting agility in staffing	<ul style="list-style-type: none"> • Better management and use of the contracting workforce • Redesigning of roles to increase supply from alternative sources • Introduction of flexible work options
5. Improving participation, retention and culture	<ul style="list-style-type: none"> • Removing barriers and disincentives to increased participation • Promoting work-life balance and flexible work practices • Promoting better health outcomes to ensure maximum participation in the workforce
6. Improving workforce planning governance and capability	<ul style="list-style-type: none"> • Improving the connection between strategic and policy direction and workforce planning considerations • Improving workforce planning projection and external scanning capability • Identifying and promulgating best practice workforce planning

Table 3. Strategies to meet future workforce requirements

Benefits of a culturally diverse workplace

A culturally diverse workplace promotes equity, enhances staff skills and contributes to successful outcomes.

One of the major benefits of a culturally diverse workplace is improved customer service. Customer service improves when staff understand and can communicate skilfully with customers from a range of backgrounds. The community is also more likely to identify with and relate to organisations that reflect its level of diversity.



Overseas trained staff can increase the pool of talent and experience in the organisation and help to reduce skill shortages at specific times and provide skills not locally available.

A culturally competent workplace brings many benefits. The State Government has produced *Diverse WA*, a free, user friendly and interactive training package which is available to all local governments.

By having a diverse workforce and using the free online training local governments can send a consistent message to the community that they are competent in engaging and communicating with people from diverse backgrounds, and can deliver services that are culturally appropriate.

Local government staff can access this free online training at diversewa.omi.wa.gov.au

Approaches to strategy formulation

The following approaches to strategy formulation may also be helpful:

Scenario planning

- What possible scenarios are there for the future?
- What assumptions underpin these?
- What are potentially possible or probable?
- What workforce do we need to achieve relevant objectives?

Cost modelling

- Determine costs in each scenario and funding source.
- Determine the short and long term financial impact.
- Establish the return on investment relative to key organisational drivers, community priorities, community service, legislative compliance, profit/not for profit, social capital.
- Undertake a Cost Benefit analysis, including the opportunity cost of not proceeding with a strategy or initiative.

Analysis of current workforce profile

Analysis of the current workforce profile, capacity and capability against identified future workforce requirements may show:

- a future shortage of required employees with particular knowledge and skills
- more employees than needed in some areas, and/or
- occupations or employee knowledge and skills which will not be needed in the future or to the same extent.

Effective strategies to consider could include:

- recruitment
- redeployment
- training and succession planning
- retraining
- transfer, or
- separation incentives.

Specific areas for consideration

- The need to match recruitment and retention strategies to the aspirations of different generations
- Need for staff with knowledge of commerce/industry/other sectors
- Need for specialised skills and experience in a tight labour market
- Need to increase the qualifications of staff
- Managing different generations, including an older workforce
- Importance of retaining corporate knowledge
- Need for a more diversified workforce
- Need for planned skills and knowledge development in constrained areas for existing or potential employees, who may be drawn from the local community or employment sector, through, for example, traineeships or bonded training.
- Need for sensitive management and confidentiality in establishing future work goals and plans with staff.

Employing a person involves more than paying their wages, they will also need space, tools and resources.

Recruiting Aboriginal people

Have you considered how your organisation can attract and retain Aboriginal staff and what benefits they can bring to your organisation?

The Aboriginal community is often a relatively untapped pool of local talent for employers in Western Australia. Workforce diversity helps you to better reflect your client or customer base, address skills shortages and develop local and regional workforces that can help meet your current and future workforce requirements.

Aboriginal people can also bring a range of skills and experience to the workplace to support your community engagement. Improved cultural understanding, knowledge of local history and community networks can support the work of your organisation in the workplace and the community.

Strategies to consider include cadetships, traineeships and mentoring programs to support Aboriginal staff.

Where to go for ideas, strategies and support

Organisation	What they can provide	Where to find out more
Department of Training and Workforce Development – Aboriginal Workforce Development Centre	Useful fact sheets, tools and resources to assist your organisation to plan and develop strategies for Aboriginal recruitment including how to attract and retain Aboriginal staff. When your organisation is ready they can help connect you with job seekers.	Perth Office Freecall: 1800 441 043 Tel: 08 9224 6535 / 08 9224 6587 Email: awdc@dtwd.wa.gov.au Web: http://www.trainingwa.wa.gov.au/awdc/detcms/portal/ Visit the website for details of regional office locations
Department of Education Employment and Workplace Relations – Indigenous Employment Program	The objective of the program is to increase Indigenous Australians employment outcomes and participation in economic activities, contributing to the Government’s commitment to halving the gap between Indigenous and non-Indigenous employment outcomes within a decade. The IEP supports a broad range of activities that are responsive to the needs of employers, Indigenous Australians and their communities. Support is available for activities that help to achieve the objective of the IEP.	General enquiries phone: 1300 363 079 Web: http://www.deewr.gov.au/Indigenous/Employment/Programs/IEP/Pages/default.aspx

** Aboriginal refers to both Aboriginal and Torres Strait Islander peoples

Summary of key areas and strategies to meet future workforce requirements

Recruitment	Retraining	Resource Sharing / Outsourcing
<ul style="list-style-type: none"> Expand the knowledge and skills pool Seek high quality staff Create partnerships Create alternative employment models Improve efficiency of orientation for early productivity gains 	<ul style="list-style-type: none"> Internal career development with formal training Skills and knowledge upgrade Multiskilling Mentoring and coaching Succession planning 	<ul style="list-style-type: none"> Consider sharing or outsourcing a complete or partial service Short term project/ long term program
Separation	Retention	Promotion/Development
<ul style="list-style-type: none"> Restructuring Voluntary redundancy programs Performance management processes <p>* All to be considered in line with IR practice and procedural fairness</p>	<ul style="list-style-type: none"> Bond / incentive strategy for career development Transition to retirement Flexible work practices 	<ul style="list-style-type: none"> Boost career advancement for high performers Offer new jobs with formalised mentoring and support for mutual benefit

Table 4. Key areas and strategies

Useful documents to help with strategy formulation

City of Wagga Wagga: Attraction and Retention Initiatives table page 27 and Risk Analysis and table including proposed action and budget over the next four years and links to the strategic plan, pages 36 – 39.
View at www.wagga.nsw.gov.au

Richmond Valley Council: Workforce Plan for a smaller local government, use of workforce data tables.
View at www.richmondvalley.nsw.gov.au

Swan Hill Rural City Council Workforce Plan: Strategies which focus on leadership and training opportunities, succession and retirement planning, support for new recruits and their families to ensure that they settle into both their roles with Council and the community overall, openness to accessing employment pools and development of an understanding of generational differences among their staff body.
View at www.swanhill.vic.gov.au

Waverley Council: use of Five Focus Areas, program of business reviews and improvements, also links to Business Plan in Comprehensive Service Profile and Required Workforce Changes, pages 33 - 59.
View at www.waverley.nsw.gov.au

Victoria State Services Authority: Best practice approach with three levels of performance indicators.
View at www.ssa.vic.gov.au

Develop a business case for workforce change

How to establish a business case⁶

A business case can be developed to support the implementation of your proposed strategies and the incorporation of these in your Corporate Business Plan.

The business case could cover the following:

- The priorities and gaps which have been identified
- The proposed strategies and the rationale for them
- Risks to your local government if action is not taken
- An outline of the proposed strategies
- The options or scenarios considered and the reasons for the choice of the proposed options
- The relationship of the proposed strategies to other policies, programs and processes across the organisation
- The benefits of the proposed strategies
- A cost benefit analysis of the associated costs and resource implications, including workforce
- An implementation plan and timeframes, including projects, structures and timelines, change management and communication plans, and performance measures.

For the strategies to be implemented successfully, it is important that all stakeholders have had involvement in the development of the workforce strategies, understand the reasons for them and have commitment to their implementation.

STEP 3 Checklist

Strategies to meet future workforce requirements

Questions to ask in the development of strategies include:⁶

-
- What are the priorities identified in your Strategic Community Plan?

 - Have you reviewed your current Corporate Business Plan and identified critical gaps to be addressed first?

 - Are all managers, staff and elected members participating in the process and contributing to discussion and strategy development?

 - Which structural and operational areas of your organisation are involved?

 - Do the priorities you have identified involve continuing with current projects, programs and activities or are new projects and programs needed?

 - Are decisions required involving changes to some current operations, and how and by whom will these decisions be made?

 - What are the risks and how will you prioritise these?

 - What are the costs? Will some costs outweigh benefits or are some costs essential to ensure that the required workforce is available, risks are minimised and there are overall benefits gained from the investment?

 - What are the budget implications?

 - Would changes to the organisational structure of your local government improve your ability to meet priorities?

 - Would changes to organisational processes, systems and/or technology be advantageous and how could these be achieved?

 - Are there individual and organisation workforce development programs to be put in place, what are they and how will this be done?

 - Will the values and culture of your local government support change and improved outcomes for the organisation?

 - What outcomes are you wanting to achieve and how will you measure your success?

STEP 4: MONITORING AND EVALUATION

How do we know when we have achieved the objectives of the Strategic Community Plan?

Asking the following questions will help a local government to measure if the objectives of the Strategic Community Plan have been achieved:

- Have you delivered Strategic Community Plan and workforce planning outcomes including agreed community expectations?
- Have you achieved / made progress towards planned outcomes for the workforce and organisation?
- What progress have you made against performance measurement indicators?
- Has there been a reduction against risk indicators in relation to workforce?



In this section you will gain an understanding of how to:

- Review outcomes against Strategic Community Plan and Workforce Planning outcomes
- Progress workforce and organisation performance indicators, and
- Reduce risk indicators.

“Successful workforce planning is an active, ongoing and dynamic process that must be monitored and adjusted. Strategies and action plans need to be continually monitored to account for any internal or external developments that occur. This will position the organisation to be ready to address and make essential changes when the environment demands change.”

[State Services Authority Victoria, 2006, p.36]

Monitoring and evaluation and the integrated planning process

The new requirements for Integrated Planning by local governments recognise the importance and value of planning and regular review. Local governments are to review their Strategic Community Plan at least once every four years and the Corporate Business Plan for their district each year.

With workforce planning an integral component of the Corporate Business Plan, this monitoring and review process involves the following questions:

- Have we delivered Strategic Community Plan and Workforce Planning outcomes? Have we delivered what the community expected?
- Have we achieved / made progress towards planned outcomes for the workforce and organisation?
- What progress have we made against performance measurement indicators?
- Has there been a reduction against risk indicators in relation to workforce?

The monitoring and review process enables your local government to assess what is working and what is not, make adjustments to plans and strategies and address in a timely way new workforce and organisational issues which might have arisen.

Re-visit the workforce targets, changes and other desired outcomes which you have identified as part of your local government's strategic community planning and corporate business planning processes and use these as the basis for monitoring and evaluating progress.

Information you might consider could include:

- Key data such as workforce profile variables and capabilities
- Corporate Business Plan targets, outcomes and performance indicators
- Planned actions and strategies and progress with the implementation of these
- Individual staff objectives and proposed outcomes
- Proposed system and organisational changes and progress with these
- Monitoring of actual costs and benefits against business plan estimates, and
- Qualitative information and performance indicators in such areas as organisational culture, values, communication and change and staff views regarding these.

Other information for the purpose of monitoring and evaluation could be obtained through:⁶

- Management meetings
- Employee and customer surveys
- Focus groups
- Analysis of work force data
- Reviews of progress reports
- Reviews of lessons learnt
- Organisation performance assessments
- Specific management reporting/ measurement systems.

Questions to ask could include the following:⁶

- Did your workforce projects achieve their objectives?
- Reflect on learning that has occurred. What worked well? What could be improved?
- Were there any unexpected outcomes?
- Were the actions and strategies completed and do they fulfil the goals?
- Did the action plan accomplish what your local government needed?
- If not, have your local government's strategies on which the plan was based changed? Are other factors preventing attainment of goals?
- Have the conditions changed so that the strategies and actions need to be modified?
- Did your local government meet its objectives?
- Are your local government's workforce planning assumptions still valid?
- Do the workforce gaps still exist?
- Are the knowledge and skills of employees being developed quickly enough to become effective?
- Is there an imbalance between work that needs to be done, workforce and knowledge and skills?
- Do new recruits have the needed knowledge, skills and level of expertise?
- Has the cost to recruit been reduced / increased? Why? With what outcomes?
- Has overall organisation performance increased?
- Does your local government have adequate staffing levels?

Risk indicators

Early in your workforce planning, you will have identified risk factors and measures for these.

Review these, assess the outcomes and make adjustments as necessary.

What does better practice look like?

Reviewing organisation direction and external environment	
<i>Better practice guideline</i>	<i>What it looks like</i>
Workforce Planning is integrated into organisational processes	<ul style="list-style-type: none"> • Workforce Planning is a core step in your local government's business planning cycle and processes, and is revisited each time the business plans are reviewed • Workforce Planning outcomes are linked to the overall corporate objectives • Workforce Planning is a high priority in your organisation • Accountability for Workforce Planning outcomes and processes is clearly articulated and understood within the organisation
Senior management reinforces the importance of strategic Workforce Planning	<ul style="list-style-type: none"> • The senior management of your local government is actively involved in all stages of the Workforce Plan from the development through to the implementation and evaluation • Senior managers or working groups oversee the implementation of Workforce Planning initiatives within the organisation • Senior managers receive regular reports on workforce issues and track Workforce Planning initiatives against targets and indicators • Senior and line managers are clear on their responsibilities and accountabilities for Workforce Planning and the link to business planning
The objectives and actions of the Workforce Plan are widely communicated and understood.	<ul style="list-style-type: none"> • A communication plan has been developed and implemented to inform all stakeholders of the Workforce Plan (its aims, initiatives and timeframes) and how it will impact on the workforce • All employees within the organisation understand the overall Workforce Planning goals

Table 5. Reviewing organisation direction and external environment.

[Adapted from State Services Authority Victoria, 2006, p11]

Performance measurement

The workforce performance measures associated with the Integrated Planning and Reporting Framework are also a key baseline against which to measure your progress. Use these to guide your work in this area.

The Workforce Planning measures to use in 2011/12 and 2012/13 are the same as those for 2010/11. They are set out in the Department of Local Government Integrated Planning and Reporting Advisory Standard document at Section 1.5.

Local governments should familiarise themselves with the Advisory Standard which is available on the Department of Local Government's Integrated Planning and Reporting website at <http://integratedplanning.dlg.wa.gov.au> or by contacting the Department on (08) 6552 1500.

Benchmarking

Benchmarking is another approach which can be used for monitoring and evaluation. Your local government may already be using benchmarking to assess and evaluate your local government's performance in some areas or across the organisation.

Benchmarking is a formal and structured process of searching for those practices which lead to excellent performance: the observation and exchange of information about them, their adaptation to meet the needs of your own organisation and the implementation of amended practice.⁸

If your local government undertakes regular monitoring of progress, the review and evaluation of your strategic community plan and corporate business plan is likely to be much more effective and productive, with better outcomes. It may take time for some of your workforce strategies and actions to bring about the desired changes. Regular monitoring and review enables you to check progress periodically and make any changes which may be required.

STEP 4 Checklist

Monitoring and Evaluation

- Does your local government need to establish or upgrade information systems to provide the data and trend information you need?

- Do you have tools and processes to enable you to monitor and report on the implementation of workforce planning initiatives?

- How will progress against timelines and milestones be evaluated? How will your local government periodically evaluate whether the desired outcomes from workforce planning have been achieved?

- Have there been internal or external changes such that you need to revisit strategies and actions in your workforce plan?

- Is workforce planning recognised as an integral part of your strategic community planning and corporate business planning? Are there tools, processes and resources in place to support this and the ongoing updating and amending of workforce strategies and actions?

WORKFORCE PLANNING ACTIONS ACHIEVED

A Summary Checklist

STEP 1: ANALYSIS OF INTERNAL AND EXTERNAL ENVIRONMENT AND WORKFORCE

- Environmental analyses undertaken
- Organisation structure chart prepared
- Workforce data collected and collated / profile developed
- Gaps identified
- Risk areas identified
- Financial analysis undertaken

STEP 2: STRATEGIC COMMUNITY PLAN WORKFORCE IMPLICATIONS

- Community expectations identified
- Strategic Community Plan vision, priorities and objectives identified
- Gaps, issues and risks identified
- Impacts of current and future environment identified

STEP 3: STRATEGIES TO MEET FUTURE WORKFORCE NEEDS

- Supporting policies and processes are in place
- Organisation structure for service delivery reviewed, changes to meet future requirements determined
- Organisational and workforce development strategies for each area of the organisation determined
- Risks and actions to mitigate these determined
- Cost modelling / workforce costing and budget allocation determined for each area of the organisation
- Outcome / performance measures determined
- Business case developed and endorsed
- Corporate Business Plan incorporates workforce planning and resourcing

STEP 4: MONITORING AND EVALUATION OF OUTCOMES

- Outcomes are reviewed against Strategic Community Plan and workforce planning outcomes, including agreed community expectations
- Progress has been made in relation to workforce and organisation performance indicators
- There has been a reduction against risk indicators

Appendix 1

National Local Government Minimum Data Set for Workforce Planning

The Commonwealth and the States/Territories are working towards achieving an agreed local government minimum data set for Workforce Planning. A copy of a draft data set is included below.

1. Council name and state/territory
2. Total number of elected representatives (councillors, mayor/president) by gender and age
3. Gender of current Mayor/President and whether the position is popularly elected
4. Total council workforce by age and gender
5. Total council workforce by educational attainment and gender
6. Total council workforce by hours worked by gender
7. Number of staff in target groups by hours worked and gender
8. Total council workforce by management responsibility by council section by gender
9. Total council workforce by occupation by council section by gender by age (age is optional)
10. Total council workforce in training programs by occupation by age by gender
11. Number of new staff hired in the previous 12 months by gender and occupation
12. Number of staff separations in the previous 12 months by gender and occupation
13. Current vacancies
14. Total annual council payroll
15. Total annual council expenditure on all forms of training
16. Workforce /EEO/training plans
17. Identified positions

For more information please visit the Department's Integrated Planning and Reporting website at <http://integratedplanning.dlg.wa.gov.au>

REFERENCES

The References listed below include examples of local government workforce plans as well as guides from public sector agencies and other sources and illustrate workforce planning at different levels of detail and complexity. More information and case studies are also available on the Department of Local Government's Integrated Planning and Reporting website at <http://integratedplanning.dlg.wa.gov.au>

Local Government Workforce Plans

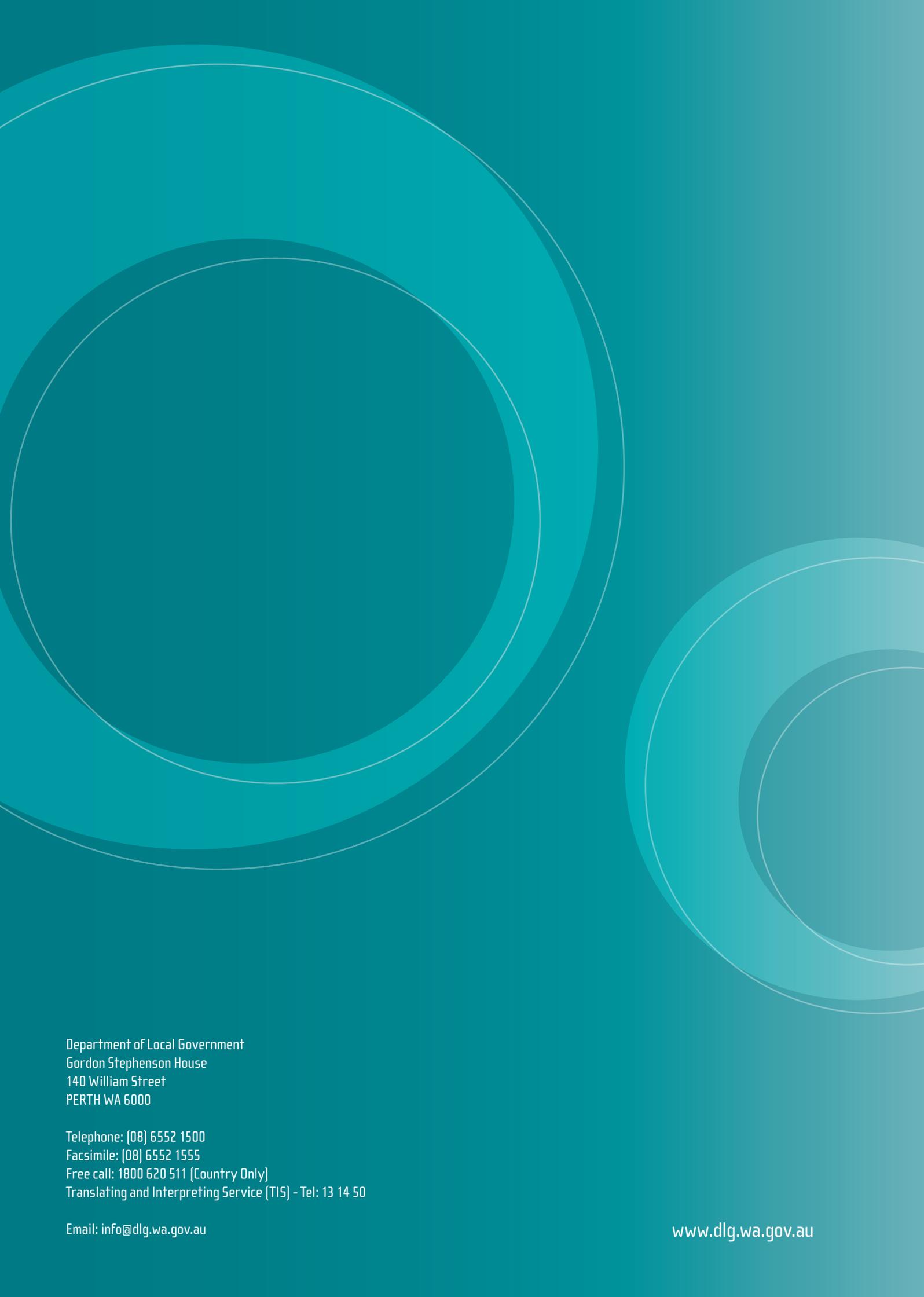
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Workforce Planning Guides

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