



The South Carolina Department of Administration's
Division of State Human Resources'

WORKFORCE PLANNING TOOLKIT

UPDATED JULY 2016

INTRODUCTION

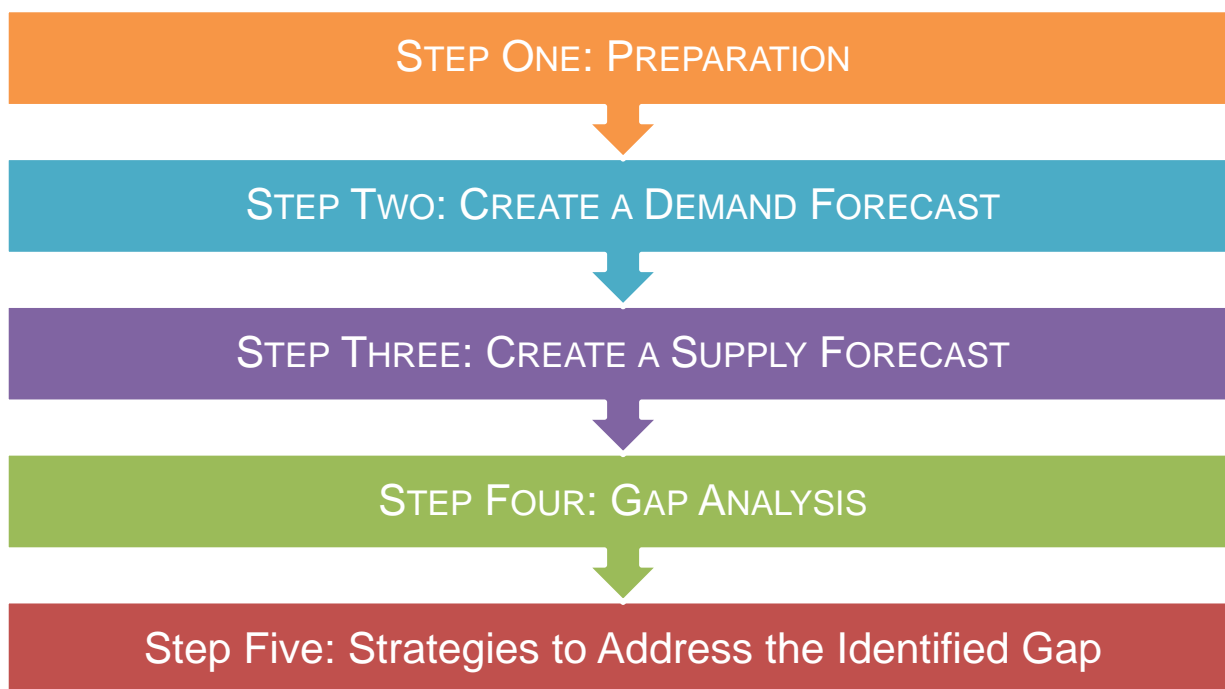
The South Carolina Department of Administration's (Admin) Division of State Human Resources (DSHR) designed this toolkit is designed to provide agencies guidance on the creation and implementation of workforce planning initiatives. This guide is not meant to be an exhaustive review of all aspects of workforce planning. Instead, it provides a framework that agencies can use and supplement with other resources. There are two appendices included with this document. The first describes methods for gathering data related to workforce planning. The second includes brief explanations of the workforce planning strategies provided in this toolkit.

In addition to this toolkit agencies are urged to review resources available through the State Library (<http://www.statelibrary.sc.gov>). The State Library provides access to various publications concerning workforce planning topics, many of which are available digitally.

WORKFORCE PLANNING OVERVIEW

Workforce planning is done to ensure that agencies have the right people, with the right skills, in the right place, at the right time. To do this agencies are encouraged to use a variety of data sources to determine their current and future workforce needs both now and in the future. This guide will provide examples of data useful for workforce planning and descriptions of various strategies agencies can use to bridge the gap between the talent they have and the talent they need or will need in the future.

Conceptually, workforce planning is a simple and straight-forward process that follows the following steps:



This toolkit explores each of the above steps and provides guidance on the tasks to be completed in each step.

STEP ONE: PREPARATION

The first step in the workforce planning process is to gather the relevant data needed to assess your current workforce and your needs in the future. The following are examples of the types of data needed:

- Current employee demographic data
- Budget forecasts
- Anticipated staffing changes, including turnover
- Planned agency reorganizations
- Anticipated legislative or regulatory changes
- Changes in agency services
- Anticipated changes to processes or procedures
- Technology changes
- Any other data which may impact staffing needs

It is important to consider changes that impact both the number of staff needed and the knowledge, skills, and abilities that will be required.

Employee demographic data can include:

- Gender
- Race
- Age
- Education
- Retirement eligibility
- Years of service
- Employee classification
- Employee pay Band
- Employee salary

By examining demographic data you can identify areas of risk within your agency. For example, positions in which incumbents are approaching retirement eligibility may need to be filled soon. In addition, demographic data combined with other workforce information may suggest areas of concern. For example, high turnover within six months of hire may indicate ineffective recruitment efforts while underrepresentation by a particular gender or race in a job classification may indicate that recruitment efforts need to be expanded to reach a broader applicant pool.

In determining future workforce needs of an agency, it is important to understand the agency's mission, vision and values and how these are translated into core service goals and program area goals. These goals will drive the number of staff needed as well as the knowledge, skills and abilities needed by staff.

STEP TWO: CREATE A DEMAND FORECAST

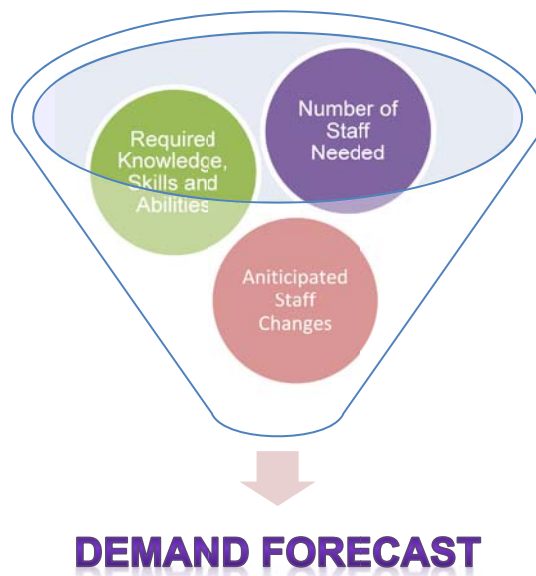
The next step is to create a demand forecast using the data gathered during the preparation phase. From this data the number of each position that will be needed to meet the goals of the agency can be determined. The following should be considered when making this decision:

- The number of employees needed.
- The knowledge, skills and abilities needed by staff.
- Key positions within the agency. (Key positions should be given special attention as they are vital to the operation of an agency.)

The impact of average, non-retirement, turnover as well as projected retirement should be considered. Agencies should pay particular attention to positions that are essential to meeting the agency's mission. Reviewing average turnover data and hiring requirements in recent years can help in determining the number of employees that will need to be hired in the future.

There are a variety of ways to determine the staffing levels required including time studies and historic staffing levels. It is important to take into account time employees will spend away from work (e.g. leave, training, administrative tasks) when determining the staff needed. Agencies should also consider the depth of availability for individual positions when determining staffing levels. For example, only one employee with a specialized skill may be needed to complete a required task but it may be a good idea to have additional staff with this skill to serve as a backup. This allows for a contingency plan should an employee leave the agency or otherwise be unable to work without notice.

It is nearly impossible to predict the staff needed with absolute accuracy given the number of variables that impact needed staffing levels. However, agencies should consider the available data and estimate the staff needed as accurately as possible to avoid being drastically over or understaffed.



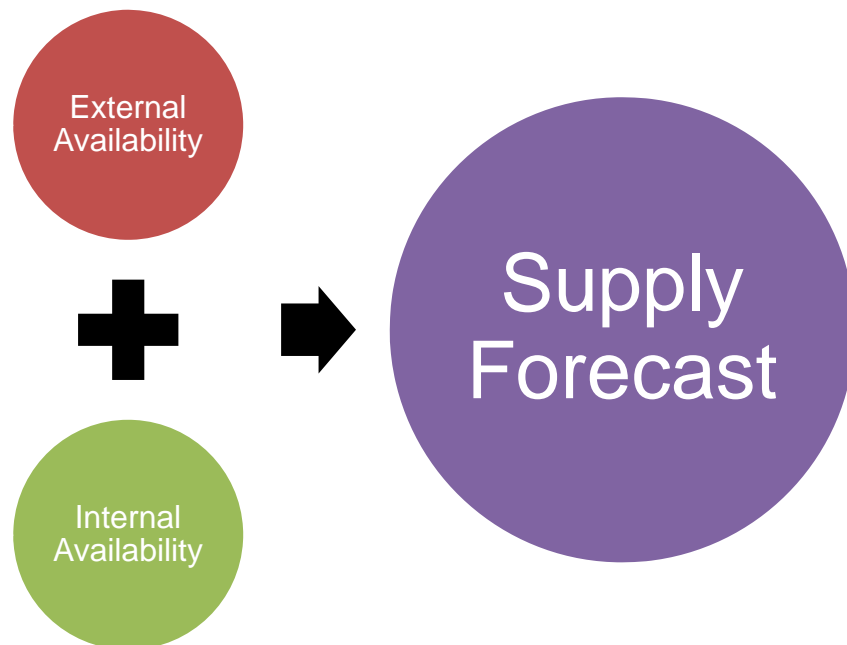
STEP THREE: CREATE A SUPPLY FORECAST

Following the completion of a demand forecast the next step is to determine the supply of available staff. In determining the available staff it is important to identify the number of staff or potential staff available with the needed knowledge, skill, and abilities.

There are two sources to consider.

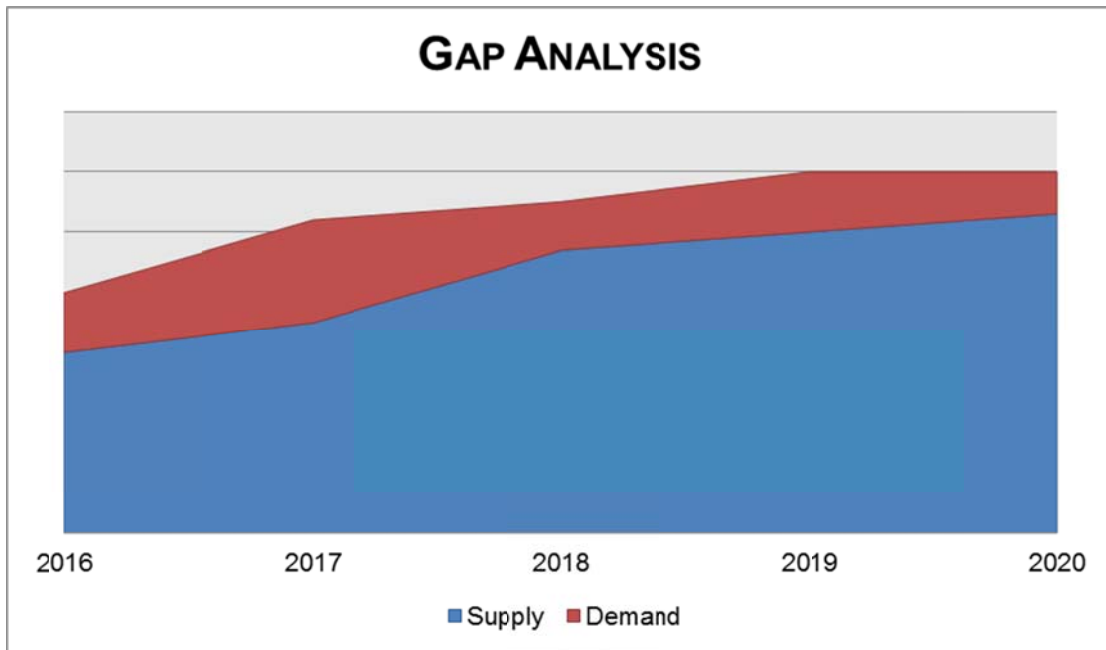
1. *Internal availability* includes current agency employees. It is important to know what knowledge, skills and abilities current agency employees possess in order to determine if they are viable candidates for positions other than the one they currently occupy. When evaluating the availability of internal staff be sure to consider areas of your agency that are particularly important and key positions within your agency.
2. *External availability* includes individuals not currently working for your agency. When determining external availability both the current labor pool and future labor supply should be evaluated. The United States Bureau of Labor Statistics can provide information concerning anticipated availability of individuals with the needed knowledge, skills and abilities. Publications and anecdotal data are also useful for determining the availability of external talent.

As is the case when creating a demand forecast, it is nearly impossible to predict the external availability of needed staff with absolute accuracy. Internal availability should be easier to gather accurately but may require extensive work to determine what knowledge, skills and abilities employees have beyond those being used in their current position. Agencies should, however, consider the data available and estimate the available staff as accurately as possible.



STEP FOUR: GAP ANALYSIS

Following completion of the Demand and Supply Forecasts the two are compared to determine where gaps exist between the staff that will be needed and the available staff. Workforce planning strategies are then used to close this gap. It may not be possible to completely close the gap. Therefore, agencies should determine not only what is needed to ideally meet the needs of the agency but also what is necessary to ensure the agency can meet the minimum requirements of its mission. Due to limited resources it may be necessary to focus on key positions or areas.



STEP FIVE: STRATEGIES TO ADDRESS THE IDENTIFIED GAP

Once the gap between the available supply and the anticipated demand has been identified, strategies can be implemented to shrink the gap. It is important to note that having the number of employees you need will not necessarily mean that staffing requirements have been met. It is necessary to ensure not only that the right number of employees is available, but also that these employees have the required knowledge, skills and abilities.

Workforce planning strategies fall into two basic categories, those that increase supply and those that decrease demand. Some strategies may impact both. Often organizations will implement a variety of strategies to address both the supply available and the demand for employees.

Below are lists of strategies which an agency may choose to implement grouped by the aspect of Human Resources impacted. Some strategies are listed under multiple headings. This indicates that the strategy is useful to address both areas. For example, employee incentives can assist with both *recruitment* and *retention* of employees.

I. Recruitment and Selection

- Compensation strategy development or changes
- Improved job advertisements
- Identification of new recruiting sources
- Interviewing skills training
- Job analysis to accurately identify needed knowledge, skills and abilities
- Job redesign
- Employee Incentives (flexible schedules, bonus opportunities, development opportunities, etc.)
- Classification changes
- Internships
- Employee referral program

II. Retention/Improve Morale

- Reward and Recognition programs
- Employee Incentives (flexible schedules, bonus opportunities, development opportunities, etc.)
- Increased training and development strategies
- Compensation strategy development or changes
- Effective orientation and onboarding processes
- Employee engagement surveys
- Cross training to allow employees to expand their skill set
- Funding employee certifications

III. Training and Development Strategies

- Succession planning
- Leadership development programs
- Job shadowing
- Cross training
- Individual development plans
- Mentoring programs
- Job rotation
- Formal training
- Allowing employees to work on special projects
- Formal education initiatives (i.e. tuition reimbursement)

IV. Knowledge Transfer

- Mentoring
- Knowledge directory
- Electronic bulletin boards
- Wikis/blogs
- Job aids
- Job rotation programs
- Communities of Practice/Interest

V. Position Classification Actions

- Job analysis to ensure positions are classified correctly
- Jobs should also be evaluated to determine if the position is necessary
- Determine if intermediate levels of leadership need to be created (example supervisor or team lead) to provide leadership training to high potential employees

VI. Organizational and Process Changes

- Technological interventions
- Process changes to increase efficiency resulting in reduced staffing needs
- Process changes which may impact skills needed
- Outsourcing options
- Reorganization
- Resource reallocation (example: transfer of staff to areas of need)

Additional Information regarding these strategies can be found in Appendix II.



OBSTACLES

When implementing workforce planning efforts a variety of obstacles may occur. Below is a list of common issues that may arise and suggestions on how to address each issue.

Lack of Time

This is perhaps the most often cited reason agencies are unable to implement a workforce planning initiative. While it cannot be disputed that the time of agency employees is a precious and limited commodity, time spent in support of a workforce planning initiatives is important to the success of an agency. It is important that this message come from all levels of agency leadership so that workforce planning is made a priority.

There are ways to address the concern over a lack of time. For example, do not tackle everything at once. Focus your efforts on areas that are most at risk for inadequate or under-qualified staff. Also, look for ways to spread the work around. Involving more employees in the process will reduce the burden on any single employee and increase buy-in as the number of employees involved increases.

Lack of Resources

Lack of resources may mean lack of people to implement and take part in a workforce planning initiative or lack of physical resources (e.g. IT resources or funds for employee incentive programs). Lack of personnel really translates into lack of time and can be addressed using the techniques described above. Lack of physical resources may be a higher hurdle for agencies to overcome because this often involves costs to an agency and available funds are limited. An agency facing this situation should carefully consider if workforce planning is something it can afford to forgo. Consider the cost of overtime incurred due to inadequate staff or funding lost due to lack of skill among workers resulting in failure to meet service requirements. As with everything workforce planning will need to be prioritized among other requirements. It is important, however, to accurately consider the cost of failing to implement workforce planning efforts when determining how to prioritize these efforts.

Hoarding of Knowledge

This is perhaps the hardest obstacle to address. It may be necessary for employees to share knowledge gained through their experience as part of a workforce planning initiative. This is particularly true in knowledge management initiatives. Some employees are compelled to jealously protect the knowledge they hold because they believe it provides them some power or job protection. Unfortunately, this belief can easily be reinforced with careless management strategies and a lack of appreciation for the time employees spend sharing their knowledge with others. Depending on how entrenched this belief is for employees, agencies may have to address this as a broader cultural issue before moving forward.

As with any change in culture, communication is key. The importance of workforce planning and the motivation for implementing applicable initiatives must be clearly communicated to employees. Employees may initially be concerned that the implementation of this process is in preparation for a reduction in force or that they will otherwise be “forced out” of the organization. Therefore, it is important to stress all of the benefits of workforce planning, particularly those that benefit the employee. These include:

- Opportunities to improve processes.
- The chance to be rewarded for sharing knowledge.
- A chance to share their wisdom and leave a legacy.

Lack of Trust

Like knowledge hoarding, this particular obstacle may require that extensive cultural changes be undertaken. Employees have to feel confident that an agency is not taking steps just to make it easier to terminate the employee. Employees also have to feel comfortable sharing experiences (both good and bad) without being made to feel incompetent or threatened. Agencies should take steps to ensure that employees are aware of their impact on the agency's success as they participate in the workforce planning process.

Lack of Support for Workforce Planning Initiatives

Without the support of all levels within an organization, it is nearly impossible for any initiative to be successful. Often, lack of support comes from the things listed above: lack of trust, scarce resources, hoarding of knowledge, and mistrust. It's important to address each of these obstacles with agency leadership and gain full buy-in before rolling out a workforce planning initiative. The next section of this toolkit discusses the importance of gaining leadership buy-in and steps that can be taken to gain this support.

General Information

It is important to ensure all employees know that they are expected to participate in workforce planning initiatives as part of their normal job duties. As appropriate, employees should be evaluated on their effective participation in workforce planning initiatives as they are on all other job duties.



GAINING BUY-IN

For any initiative, including those related to workforce planning to be successful the support of stakeholders is vitally important. Stakeholders in workforce planning initiatives include:

- Agency leadership (director, deputy Director, etc.)
- Middle managers (those who manage portions of an agency through other managers or supervisors)
- First-line managers or supervisors
- Employees
- Customers

To gain the support of these stockholders it is important to demonstrate that workforce planning is necessary to:

- Ensure business continuity
- Predict talent needs and develop strategies to meet these needs
- Avoid wasting resources by hiring too many staff or staff with the wrong knowledge, skills and abilities.

It is also important to make stakeholders aware of the consequences of failing to take action. While each situation is different, below are some examples of possible consequences of failing to focus on workforce planning:

- Business Interruptions caused by shortage of employees or loss of knowledge.
- Increased overtime costs associated with reduced staff.
- Increased cost of turnover as overworked or undertrained employees leave.
- Legal risks associated with improperly performed functions resulting from decreased or unprepared staff.
- Negative publicity associated with service interruptions or failures.
- Loss of funding tied to performance measures.
- Increased cost associated with overstaffing because the number of employees needed is unknown.
- Loss of investment in training resulting from increased or unexpected turnover.
- Poor management resulting from a failure to identify and train future leadership.

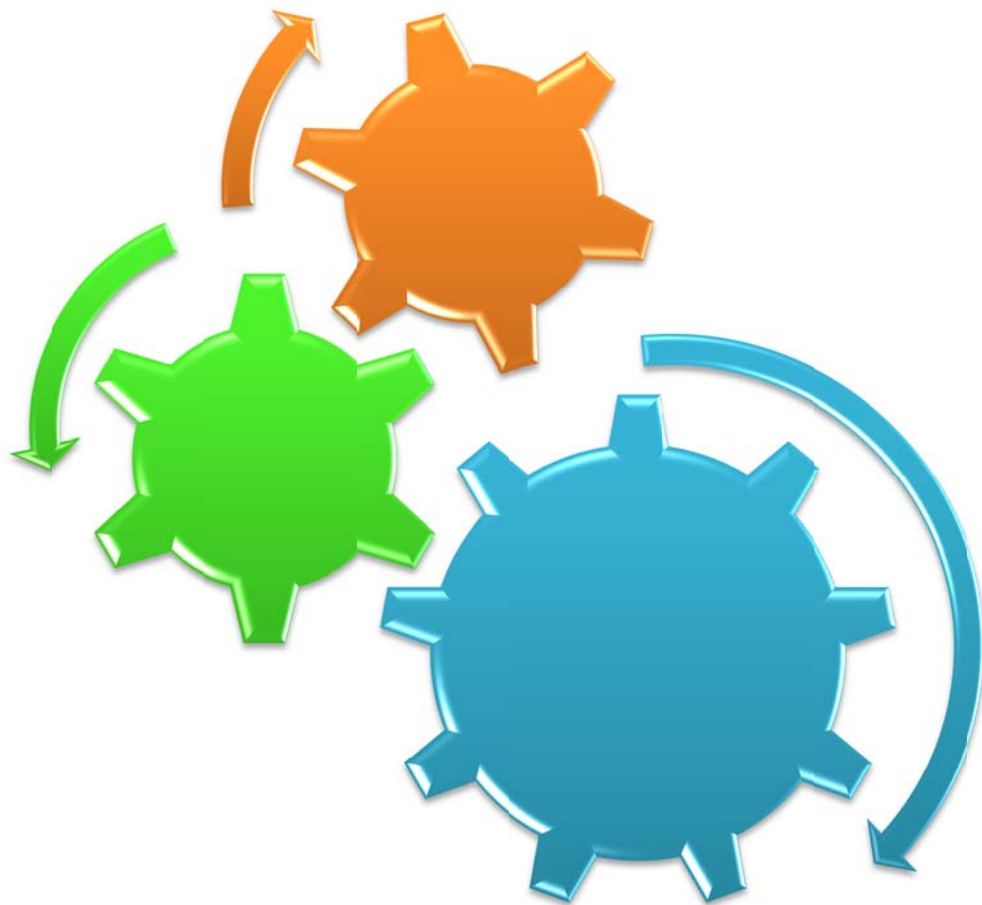
Gaining stakeholder support will help when addressing obstacles that may arise as part of the workforce planning process. It is important to discuss possible obstacles with leadership and develop a plan to address these obstacles before workforce planning efforts begin.

CONCLUSION

Workforce planning is not a task that you complete. It is an ongoing process. As changes occur, workforce needs will shift and change. Agencies that are not nimble enough to respond to these changes risk failing to meet the requirements their missions. A comprehensive and ongoing workforce planning process will help agencies more quickly and more effectively manage in an ever-changing world.

As stated previously this toolkit is designed to provide general guidance on workforce planning and various workforce planning initiatives. You are urged to review other available resources as you move forward in your efforts. In addition, Admin's DSHR is available to assist you.

If you any questions about the content of this toolkit please contact the Department of Administration's Division of State Human Resources by calling 803-896-5300 or visiting our website at admin.sc.gov/humanresources.



APPENDIX I – DATA RESOURCES

I. DATA NEEDED DURING PREPARATION

SCEIS Reports

Agencies that use the SCEIS system have access to several reporting sources that can be used to gather data related to workforce planning.

Business Objects and BEx Queries can be used to gather a variety of useful data, including but not limited to:

- FTE Totals by Funding Sources
- FTE Totals by Classified/Unclassified
- Vacancies
- Employee Demographics and Position Information
- Employees with Selected Years State Service
- Employees in Trial or Probationary Status
- TERI and Retiree Employee Listing
- Class and Comp Report - Statewide Positions and Funds
- Average Salary and Service Details

The Reporting Section of the SCEIS website provides additional information about available reports and instructions on how to use BEx and Business Objects.

In addition to BEx and Business Objects agencies have access to a Human Resources Dashboard which provides a snapshot of the employee population of that agency. The link to the HR Dashboard can be found on the SCEIS website. To view the statewide HR Dashboard please visit admin.sc.gov/humanresources.

HRIS Reports

Agencies that use the HRIS system can access a variety of reports, including but not limited to:

- Positions by Agency, Classification and Slot
- Source of Funds
- Vacancy Report
- TERI Employee Listing
- Demographic Data by Classification and by Pay Band

Additional reports may be available by request.

Budget Forecasts

Agencies should consider both changes to funding received from state and federal sources as well as any performance driven revenue earned by the agency. For example, revenue earned through fees or penalties paid by the public, payments received based on contracts with other entities, and sale of any property that might generate revenue. It is equally important to consider all costs the agency can expect to incur, particularly new costs. This might include the cost of infrastructure updates, repairs, etc.

Anticipated Staffing Changes, Including Turnover

While it is impossible to predict every staffing change that will occur, there are steps agencies can take to predict likely turnover. Historical turnover is a good predictor of future turnover. However, it is important to evaluate how turnover might be impacted by changes from year to year. Turnover can be calculated using the following equation:

$$\text{Number of employees separated} \div \text{average number of employees}$$

Supervisors should be encouraged to speak to employees who are approaching retirement eligibility, or those who are already retirement eligible, about their future plans. It should be clear, however, that the agency is not trying to encourage the employee to retire. Ideally, every employee regardless of retirement eligibility should be asked about his or her future career plans so that supervisors and managers can assist in their development or plan for their departure.

Anticipated Legislative or Regulatory Changes

Legislative and regulatory changes often impact the services an agency provides and may result in staffing changes. Staffing changes can include the number of employees needed or changes in the skills needed by employees.

Technology Changes

Technology changes can impact staffing in two primary ways. First, the number of staff may change following the implementation of new technology. For example, automation often results in a reduction in staff needed. Technology may also change the skills needed by staff. This may require additional training for current staff or hiring new staff with the needed skills.

II. DATA TO SUPPORT RETENTION EFFORTS

Exit interviews

When performed correctly, exit interviews can provide information about why an employee decides to leave an agency. Generally exit interviews are only conducted for voluntary resignations and do not include involuntary terminations. Below is example of an exit interview questionnaire:

Sample I

Using the following scale please respond to the statements below:

Strongly Agree • Agree • Disagree • Strongly Disagree

My Supervisor

1. My supervisor recognized contributions that I made to the organization.

2. My supervisor set an example for others to follow.
3. My supervisor treated me with dignity and respect.
4. My supervisor gave me useful feedback on my performance.
5. My supervisor gave me timely feedback on my performance.

Leadership

6. The leadership of this organization cares about people.
7. The leadership of this organization sets a high standard of performance.
8. The leadership of this organization has created an effective organizational structure.
9. I felt that my work efforts contributed to the mission and goals of the agency.

Organizational Commitment

10. I value the relationships that I have developed with others in the organization.
11. Being in this organization was like being part of a family.
12. People in this organization look out for one another.

Compensation/Benefits

13. The compensation I received was commensurate with my level of education and experience.
14. My pay was in line with the current market rates for people with my skills and experience.
15. The benefits I received were an incentive to remain employed by state government.
16. I compared the value of the state's benefits plan with that of my new employer before making the decision to leave. (Yes or No)

Advancement/Growth

17. My job provided me with an opportunity to learn and grow professionally.
18. This organization provided opportunities for promotion and/or advancement.
19. I was given adequate training to do my job.

Challenging Work

20. My job provided me with challenging work to do.
21. I enjoyed the type of work that I did here.

22. My workload here was (check one):

- Too much for one person
- Occasionally heavy, but about right on most days
- Just right-not over or under worked
- Not enough-did not fully use my time

Support

23. The equipment that I had to work with allowed me to perform at a high level.

24. The organization saw to it that I had the resources I need to do my job.

Overall Satisfaction

25. What was your overall level of satisfaction with your job? Please explain.

26. My main reason(s) for leaving is/are:

- Higher pay
- Better benefits
- Better chance for advancement
- My relationship with my supervisor
- The agency work environment
- The lack of resources to adequately do my job
- Other, please elaborate

27. What, if anything, could the organization have done that would have made it more likely for you to stay?

28. Are you going to a new job in:

- Another state agency, but in a similar kind of work
- Another state agency, but in a different kind of work
- Private sector, but similar kind of work
- Private sector, different kind of work
- Other, please elaborate

Demographic Information (Please complete the following questions about you to assist us with compiling statistical data related to retention):

1. Date of birth:
2. My race is (check one):
 - White
 - Black/African American
 - Hispanic/Latino
 - Asian
 - American Indian/Alaskan Native
 - Native Hawaiian/Other Pacific Islander
 - Two or More Races
3. My gender is:
 - Male
 - Female
4. How many years of state service I have:
 - 1-5
 - 6-10
 - 11-20
 - more than 20
5. My current job classification is:

Thank you for your assistance.

Stay Interviews

A stay interview is a structured discussion between an employee and their supervisor to identify what action can be taken to increase retention. Stay interviews have several advantages over exit interviews:

- You can target employees you want to stay with your organization (top performers).
- You may receive more honest feedback since current employees are more invested in seeing the organization improve.

Stay Interviews should:

- Include questions designed to elicit honest feedback about why an employee stays, what the supervisor can do differently, and what would tempt an employee to leave.
- Be separate from performance.

- Be conducted at early intervals after an employee joins an organization and periodically thereafter.
- Allow an organization to focus effort on top performers by determining what is important to them.
- Put managers in the position to manage the retention issues of their employees.
- Be conducted by supervisors or managers (not Human Resources).

Adapted from "Stay Interviews + Onboarding: Involving Managers to Reduce Early Turnover," presented by Dick Finnegan for the Society for Human Resources Management, April 19, 2012.

Prior to implementing stay interviews it is important to gain commitment from leadership to take action based on the feedback received from the interviews. If the interviews are conducted, but no action is taken based on employee feedback, employee morale will likely be negatively impacted.

III. OTHER DATA SOURCES

- Market Salary data can be used when designing compensation plans and evaluating salary level information.
- Employee engagement surveys can provide information regarding the culture or the workplace. Prior to implementing employee engagement surveys it is important to gain commitment from leadership to take action based on the feedback received from the surveys. If the surveys are conducted, but no action is taken based on employee feedback, employee morale will likely be negatively impacted.

APPENDIX II – STRATEGIES

The areas of workforce planning to focus on are selected based on the gap analysis. The information below is provided to assist in the selection of the appropriate strategy.

Recruitment and Selection Strategies

If you determine that available staff (or potential staff) will not be sufficient to meet the needs of the agency, either in number or in required skill, it may be appropriate to implement changes to improve the recruitment and the selection of candidates. These changes may include:

- Compensation strategy development or changes
 - If low compensation has made it difficult to recruit employees it may be necessary to increase base pay or implement pay-for-performance initiatives to compete with the market for in-demand applicants.
- Improved job advertisements
 - Job advertisements can be used to describe the positive aspects of working for an agency as well as the career opportunities available within the agency. Agencies may also choose to emphasize the public service aspect of working within the public sector.
- Identification of new recruiting sources
 - In order to expand the available applicant pool, agencies may choose to target previously untapped sources for candidates. For example, an agency may choose to target applicants exiting the military or may develop partnerships with the South Carolina Department of Employment and Workforce, the South Carolina Department of Vocational Rehabilitation or the South Carolina Commission for the Blind to reach candidates which may be missed by traditional recruitment efforts. Recruitment efforts can be expanded to increase the total number of applicants as well as increase the number of applicants from an underrepresented group.
- Interviewing skills training
 - Additional training may be necessary to help those who conduct interviews to select successful candidates.
- Job analysis to accurately identify needed knowledge, skills and abilities
 - By ensuring recruitment is targeted towards individuals with the appropriate knowledge, skills and abilities the process will be more efficient. In addition, by ensuring that the job requirements are only as stringent as necessary candidates will not be unnecessarily excluded.
- Job redesign
 - If there are not sufficient applicants to fill required positions it may be necessary to redesign the job to make it more attractive to candidates or to change the skills needed to perform the job.

- Employee Incentives (flexible schedules, bonus opportunities, development opportunities, etc.)
 - Implementing employee incentives may make it easier to recruit employees. It may be helpful to list these incentives in job postings to entice applicants.
- Classification changes
 - Classifying jobs correctly ensures the correct salary range is applicable and that the correct minimum requirements are used.
- Internships
 - Internships provide the opportunity for employees to work with an agency temporarily. Employees with a positive internship experience are more likely to consider employment in a Full Time Equivalent (FTE) position.
- Employee Referral Program
 - Current employees are familiar with an agency's culture and are able to identify candidates who would be successful within that environment. Current employees also have an interest in having successful candidates join an organization. Agencies may choose to offer a financial incentive to encourage employee referrals. Information to assist in the establishment of an employee referral policy can be found at admin.sc.gov/humanresources.

Retention Strategies/Improving Morale

Agencies may decide to target efforts toward increasing employee retention (lowering turnover) which often includes efforts to improve morale. These efforts are designed to retain employees so the required staffing level can be maintained.

- Reward and Recognition programs
 - Appropriately designed reward and recognition programs can increase employee satisfaction which may increase employee retention. These programs may include recognition from peers or leadership for good performance. This recognition may or may not include some tangible reward like a certificate, plaque, small monetary award, etc. There are restrictions on the amount used for these awards. For additional information please refer to the Division of State Human Resources section of Admin's website.
- Employee Incentives
 - Employee incentives include things like flexible schedules, bonus opportunities, developmental opportunities and career growth plans. It is important when implementing incentive programs to first determine what incentives are valuable to the employees of the agency.

- Increased training and development strategies
 - Employees provided training and development opportunities may be more likely to remain with an agency because these opportunities help expand their skills and provide experience they may be able to use in the future as new opportunities become available. Training and development includes things like formal training programs, such as the Certified Public Manager Program, opportunities to work on special projects within the agency, mentorship programs and job shadowing.
- Compensation strategy development or changes
 - If you find through exit interviews or market studies that employees are leaving for better pay it may be necessary to reevaluate the agency compensation strategy to be more competitive.
- Effective orientation and onboarding processes
 - High turnover early in employees' tenure may indicate that your orientation and onboarding processes need to be revamped.
- Employee engagement surveys
 - Employee engagement surveys can help you identify what concerns or issues exist in your agency that might cause people to leave. Employee engagement surveys can be conducted in-house but organizations may also choose to hire someone to conduct the surveys to preserve anonymity and encourage more honest feedback. Before implementing employee engagement surveys it is important to gain commitment from leadership to take action based on the feedback received from the surveys. If the surveys are conducted, but no action is taken based on employee feedback, employee morale will likely be negatively impacted.
- Cross training to allow employees to expand their skill set
 - Employees who have the opportunity to expand their skills and take on new tasks may be more willing to stay with an organization.
- Funding employee certifications
 - Employees may decide to remain with an organization if they are provided the opportunity to gain employee-related certifications at no cost. In addition to retaining employees, the agency benefits from having a workforce with applicable certifications.

Training and Development strategies

Investment in the training and development of employees may positively impact employee retention while also improving employee skills. This will improve both the size and quality of the internal talent pool.

- Succession planning
 - Succession planning is designed to provide a path for employees to move into leadership or other key positions. Employees receive appropriate training and development opportunities to prepare them for applicable positions. The agency benefits because the supply of staff is increased. It is important to remember that the purpose of succession planning is not to pre-select a single candidate for a role but rather to create a pool of qualified applicants from which to hire from when a position becomes available.
- Leadership development programs
 - Leadership development programs provide employees with the opportunity to gain leadership skills to prepare them for leadership roles. Agencies benefit by increasing the number of employees prepared to move into leadership positions as these positions become available.
- Job shadowing
 - Job shadowing provides employees with brief exposure to other positions within the agency. As part of the job shadowing process employees are provided with guidance on the requirements of the position and given general information regarding the duties of a particular position. This expands and enhances an employee's view of the agency as a whole and may provide a path for career growth enticing the employee to stay.
- Cross training
 - Cross training allows employees the opportunity to learn how to perform a job other than their primary job function. Agencies may also periodically have the employee perform this "other" job. If the employee values the opportunity to expand his or her skills and the ability to occasionally do different work, this may increase the likelihood the employee will stay with an agency. Agencies benefit because there are multiple people who can perform the function allowing for coverage in the event an employee leaves.
- Individual development plans
 - Individual development plans provide employees with a pathway for training and development. Employees may be encouraged to stay with an organization because they see the agency is willing to invest in their development and they have a structured path to enhance their knowledge, skills and abilities. The agency will benefit from an enhanced pool of internal candidates.

- Mentoring programs
 - Mentoring programs allow for the transfer of knowledge gained through experience which is not easily captured through traditional process documentation. Employees who participate in a well-designed mentoring program are often more engaged.
- Job rotation
 - Like cross training, job rotations provide employees with the chance to learn a variety of job functions. This expands the employee's knowledge of the agency. Employees who complete a job rotation program gain valuable skills that may make them better candidates for leadership positions.
- Formal training
 - Formal training expands the knowledge and skills of employees related to specific topics. Formal training can include soft skills such as communication, leadership and problem-solving as well as job-specific skills. Formal training increases the skill of an agency's internal talent pool and may also serve to increase employee retention if the employee sees value for themselves in the training.
- Allowing employees to work on special projects
 - Providing employees with the opportunity to work on, or lead, special projects expands their knowledge and can give the employee leadership experience. This is particularly true if the project crosses functional areas. Employee retention may also be positively impacted if employees value this type of opportunity.
- Formal education initiatives (i.e. tuition reimbursement)
 - Tuition reimbursement assists employees in obtaining additional work related education by reimbursing them for eligible educational cost. The benefits to this mirror other training and development initiatives in that it gives employees the opportunity to increase their skills while also improving the agency's internal talent pool. If the reimbursement is tied to length of service, or if the employee is required to work for some period after reimbursement is received, this may also help with retention.

Knowledge transfer strategies

All knowledge transfer strategies are designed to capture and retain knowledge of current employees and make that knowledge available to others in an organization now and in the future. Below are some examples of knowledge transfer initiatives with a brief explanation of each.

- Mentoring
 - Mentoring happens when an experienced employee (mentor) provides guidance to a newer employee (mentee). This guidance is usually not directly job related. Rather, the mentor provides information related to an organization's culture and general career growth assistance. The mentor is usually not the mentee's supervisor.
- Knowledge directory
 - A knowledge directory captures the knowledge, skills and abilities of current employees. This directory includes skills being used in each employee's current position as well as other skills which may be useful in different positions. Using these directories agencies can more accurately determine what skills their employees have and what skills they need to hire for.
- Electronic bulletin boards
 - Electronic bulletin boards allow employees to post questions which can be accessed and answered by other employees.
- Wikis/blogs
 - Wikis/blogs allow employees to document information that is then made available to others in an organization.
- Job aids
 - Job aids include things like flowcharts, procedure manuals, checklists, etc.
- Job rotation programs
 - In job rotation programs, employees work in a variety of positions, generally across functional areas.
- Communities of Practice/Interest
 - A group of individuals sharing a common working practice (for example – finance) who meet over a period of time, though not part of a formally constituted work team. Generally, groups are created across organizational boundaries and enable individuals to acquire new knowledge faster.

Position classification actions

Position classification actions can be used to ensure recruitment is targeted to the skillset needed and that appropriate salary thresholds apply.

- Job analysis to ensure each position is classified correctly.
 - Job analysis involves a review and documentation of the required tasks of a job. It is important to remember that the job, not the incumbent employee, is being reviewed. This may involve observing an employee working during the day and interviewing the employee and their supervisor.

- Jobs should also be evaluated to determine if the position is necessary.
 - In determining staffing levels organizations often assume that the positions that exist will need to remain, and in the present form. This may or may not be true. It is a good practice to periodically review if a position is necessary and whether the position needs to be changed. This is particularly important when a position is vacated and before recruitment for a replacement begins. It is important to ensure that if changes are made to the functions performed as part of a job, then the job should be reviewed to confirm the classification is correct.
- Determine if intermediate levels of leadership need to be created (for example supervisor or team lead) to provide leadership training to high potential employees.
 - Use of positions like “team lead” give employees the opportunity to gain valuable on-the-job leadership experience while also learning from the agency’s current leaders. This provides a pipeline of potential leaders within the agency and allows for knowledge transfer from seasoned employees in leadership to others.

Organizational and Process changes

Organizational and process changes may impact both the staff needed (demand) and the available candidates (supply). Below are examples of organizational and process changes that may impact staff supply or demand.

- Technological Interventions
 - Changes to technology may reduce the number of staff needed through increased efficiencies or may change the skill set needed by employees. Depending on the skill set change this may increase or decrease the available qualified applicants.
- Process changes
 - Efficiency can be gained by reducing repetition, eliminating unneeded steps, etc. This could result in a reduced number of needed staff.
 - Process changes which may impact skills needed.
- Outsourcing options
 - Using outsourcing providers generally reduces the number of employees needed.
- Reorganization
 - Like changes to technology, reorganization may reduce the number of staff needed through increased efficiencies or may change the skill set needed by employees. Depending on the skill set change, the available qualified applicants may increase or decrease.

- Resource reallocation (for example – transfer of staff to areas of need)
 - By ensuring that all parts of the agency are staffed appropriately agencies can avoid the cost of being overstaffed in one area and the business interruptions caused by being understaffed in another.