

Integrated Human Resources and Business Planning Checklist:

Five-step approach to determining and building for current and future needs

Determine your business goals

A solid understanding of organizational priorities and the business planning cycle is critical for effective alignment of human resources (HR) and business goals. As you begin your integrated HR and business planning, ask the following questions:

- ✓ What are the government's key priorities (e.g. Clerk's priorities, Speech from the Throne)?
- ✓ What are your organization's ongoing HR and business priorities?
- ✓ Have you reviewed the call letter on the Report on Plans and Priorities and the Departmental Performance Report?
- ✓ What emerging directions and changes will have an impact on HR issues?
- ✓ What legislative reforms relevant to your mandate need to be considered (e.g. HR modernization)?
- ✓ Have all necessary strategic partnerships been established to facilitate your integrated HR and business planning efforts (e.g. corporate or program sector)?
- ✓ Are you developing your plan in consideration of accountability requirements and HR supporting material (e.g. TBS Management Accountability Framework, People Component of the Management Accountability Framework, the Integrated HR and Business Planning Calendar)?

Scan the environment

Workforce Analysis

A key component of integrated planning is understanding your workforce and planning for projected shortages and surpluses in specific occupations and skills sets.

Has the following employment information been analyzed for various occupational categories or functional communities?

- ✓ Demographics and employment characteristics (e.g. employment equity (EE) designated groups, official languages (OL), age profile, average age of retirement, and years of service, employment type, leave usage, reasons for leaving, absenteeism, grievances, use of Employee Assistance Program)
- ✓ Skills/competencies (e.g. training/learning data, performance management data, language competencies)?
- ✓ Internal workforce trends (e.g. eligibility for retirement, vacancy rates, turnover rates, internal staff mobility such as deployments, promotions, secondments)

Examples of Considerations:

- ✓ Have you considered your contingent workforce in your workforce analysis (e.g. casuals, students)?
- ✓ Have you consulted documents such as audit reports, employee survey findings, HR annual reports (e.g. OL, EE, staffing), Departmental Performance Report, Report on Plans and Priorities, etc?
- ✓ Have you checked with functional community secretariats for information relevant to your department/agency?

Internal Scan

Identify factors internal to the organization that may affect HR capacity to meet organizational goals.

Have you considered...?

- ✓ Changes in legislation, policy platform, program delivery
- ✓ Labour management relations
- ✓ Changes to collective agreements
- ✓ Employee engagement
- ✓ HR Initiatives (e.g. EE)
- ✓ Anticipated changes to funding levels
- ✓ Changes in leadership & priorities
- ✓ Organizational re-structuring
- ✓ Corporate culture change
- ✓ Client satisfaction
- ✓ Capacity and quality of information systems
- ✓ Health and Safety

External Scan

Determine the most important environmental factors expected to affect workforce capacity, given known operational and HR priorities and emerging issues.

Have you considered...?

- ✓ Current workforce trends (e.g. retirement patterns, growing occupations)
- ✓ Demand and supply of employees in growing occupations
- ✓ Current and projected economic conditions
- ✓ Technological advancements which may make certain occupational positions obsolete or create new employment
- ✓ International policies that may affect your workforce capacity
- ✓ Immigration and/or regional migration patterns that may affect your workforce capacity
- ✓ Sources of recruitment
- ✓ Federal, provincial, regional realities

Conduct a gap analysis

Based on an analysis of the environmental scan and business goals, what are the organization's current and future HR needs?

Examples of Considerations:

- ✓ Based on projections, do you foresee a skills shortage in specific occupational groups?
- ✓ Will changes in program delivery require the acquisition of new skills?
- ✓ Do you have enough qualified middle managers to feed into the EX group?
- ✓ Have OL and EE obligations been met?
- ✓ Have you conducted a risk assessment on elements of the scan critical to your organization's success (i.e. probability of occurrence and their projected impact)?

Set HR priorities to help achieve business goals

Based on the organization's goals, environmental scan and gap analysis: 1) What are the major HR priorities; and 2) What strategies will achieve the desired outcomes? Work plans may include strategies on:

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| • Recruitment/Staffing | • Leadership Development | • Employee Engagement |
| • Retention | • Learning, Training and Development | • Reward and Recognition |
| • Mobility/Redeployment | • Performance Management | • Workplace Well-being |
| • EE | • Competency/Skills Development | • Workplace Accommodation |
| • OL | • Succession and Contingency Planning | • Labour Management Relations |
| • Classification/Organizational Design | • Corporate Knowledge Retention | • Values and Ethics |
| • Change Management | • Health and Safety | • Organizational Development |
| • Systems Capacity | • HR Planning | • Disability Management |

Examples of Considerations:

- ✓ Are the HR priorities and key planning issues included as part of the Report on Plans & Priorities?
- ✓ Are budgetary considerations factored into the work plan/strategy?
- ✓ Is it possible to leverage expertise through partnerships with other organizations (e.g. Federal Regional Councils, Functional Community Secretariats)?
- ✓ Are you incorporating the research from "promising practices" into your work plan/strategy?
- ✓ Are you taking advantage of your departmental/agency staffing program and tools?
- ✓ Is the work plan/strategy being cascaded to organizational units?
- ✓ Are strategies effective and efficient in achieving objectives?

Measure, monitor and report on progress

Measuring, monitoring and reporting HR performance outcomes is key to assessing progress in target areas, organizational learning and improvement and determining future priorities.

- ✓ Does the organization have clear and measurable HR-related goals?
- ✓ Are the HR performance measures aligned with indicators in the TBS Management Accountability Framework and the People Component of the Management Accountability Framework?
- ✓ Are systems in place to track performance indicators and analyze cost benefit?
- ✓ Do results from your performance indicators inform your priority setting for the next fiscal year?
- ✓ Does your Departmental Performance Report include a section on the degree of success of your integrated planning and management-related efforts?
- ✓ Have you analyzed data elements that are included under formal reporting requirements (e.g. EE, OL)?