Review Your Workforce

Project Report

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Executive Summary

The Review Your Workforce Tool[1], was developed as a resource to allow organisations to assess the systems and processes being used in workforce planning and review and their development capability and capacity to use systems, processes and documentation for four domains of operations. The tool was developed in conjunction with Human Resource (HR) professionals and with input from the Workforce Coalition and industry representatives as part of the Workforce Coordination Project under the *Tasmanian Community Services Industry Plan 2021-31*.

The tool addressed four domains where systems, processes and documentation are needed for effectively managing workforce:

1. Strategic Planning

2. Operational Planning

3. Organisational Development

4. Employee Life Cycle

The Review Your Workforce | Is your workforce ready? website was created in June 2023 and the Tool uploaded for access by individuals with capacity for completing the questions, having analysed results provided with anonymity. Since the launch of the site in September 2023 it has been accessed by 795 new users with 1,800 views. Of these users, 28 were repeat users. There were 1,111 sessions across the domains.

The Tool is also available in hard copy allowing agencies to use different domains with different work teams or groups in their organisation. For example, the Board of an organisation could explore the Strategic domain to determine those aspects where they are performing well and where they may need to improve against their own expectations and industry benchmarks.

While the Tool provides opportunities for improvement at agency or organisational level, it also allows for the potential for collaboration within and across sectors to enhance sharing of domains where organisations were doing well and where improvements could be made and shared. Collaboration across sectors and/or places, allows organisations to collectively seek training and development delivery options for those involved in improving systems, processes and documentation relating to workforce.

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[1][1] Formerly the Workforce Planning and Development Capability and Capacity Review Tool

1. Background of the Project

The Review Your Workforce Tool was developed in response to a need, identified early in the Workforce Coordination Project, for a mechanism to improve strategic workforce decision-making and capacity to develop strong systems, processes and documentation to support workforce planning tools. The Tool was designed to support organisations assess possible improvements regarding effective processes and documentation for maintaining their workforce.

During the development of the Tool, significant input was sought from the Workforce Coalition Network Meetings in September 2022 and March 2023. The Tool was launched at the Coalition Network Meeting held in September 2023.

The Tool is can be completed online or using hard copy review questions. It is self-paced, provides anonimity and enables organisations to commence with the domain that best meets theirneeds.

Organisations are able to self assess their practices and documented systems against four key domains of workforce operations:

1. **Strategic Planning** – enables consideration of the workforce enviornment including legislative changes, regulatory standards of practice and compliance and how to set strategic direction for improvement of processes that will support the desired culture and documentation within an organisation.

2. **Operational Planning** – considers staffing needs, capabilities and skills, what roles are required within an organisation and who fills these roles. It also prompts the user to consider what is required in processes and documentation that will support the operational planning needed in the workforce to meet future demands.

3. **Organisational Development** – prompts consideration of organisational effectiveness and performance. It poses questions about change management processes, developing and documenting workforce culture, leadership and management capacity.

4. **Employee Lifecycle** – addresses recruitment, onboarding, employee performance and development, career planning, succession planning and departure. It prompts users to consider what strategies, processes and documentation they have in place across the employee lifecycle and to plan for future improvements.

2. Highlights and Innovations

The tool provides innovative approaches and resources for industy, including:

- Online and hard copy versions for use by individuals and organisational teams and groups.

- Reporting online gives the user the option to receive a report on their organisation's performance against benchmarks contained within the questionnaire which can be used to prioritise key areas where improvement could assist the organisation.

- Using both online and hardcopy versions is anonymous – any organisation using the Tool online cannot be identified and using the hard copy version internally provides for secure storage in the organisation's own records system.

- Ability to focus on a single domain of operation at a point in time ensuring that an organisation is not overwhelmed with the need to address all domains at once.

- Following completion of a domain questionnaire, and making any improvements, an organisation can complete the questionnaire again, noting the changes that have taken place *resulting in* a record of improvement.

- Using a combination of written instructions and videos explaining how the tool works broadens the audience appeal of the Tool, as does having the videos available on YouTube. See below:


Example of video embedded in the Review Your Workforce webpage

Project Performance

3. Summary

The outcomes of this project include:

- As agencies and organisations shared information about the use of the *Tool*, they identified where they could possibly collaborate within and across sectors to maximise *the* use of resources to address improvements. Identifing areas for skills improvement means that information in the Training, Development and Career Pathways *R*eport and the Resource Library can be accessed to support organisations source training and development*opportunities*.

- By applying the Archetypes that are being developed as part of the Workforce Coordination Project Program of Research, organistions will be able to identify the implications of the systems and processes they develop on the types of people who are attracted to the indsutry, and then undertake workforce planning to build capacity and sustainability.

- Two Workforce Ready Team members provided a workshop on using the *Tool* at the Tasmanian Neighbourhood Houses conference on the West Coast in September 2023. Over 20 attendees including managers, *B*oard members and *P*roject *O*fficers commenced using the *Tool*. During the session the participants *provided feedback that* the human resources language *used in the Tool* was *un*familiar to them *and* could prevent them using the *Tool* with their staff and boards as well as being able to discuss their findings for planning purposes. Three managers offered to work with the project to *develop* a plain language version for smaller organisations. .

- Analytics from the Review Your Workforce Website to November 2024, shows 823 active users across 1,111 sessions with 1,800 page views since November 2023, providing evidence of significant uptake and use of the Tool across the industry.
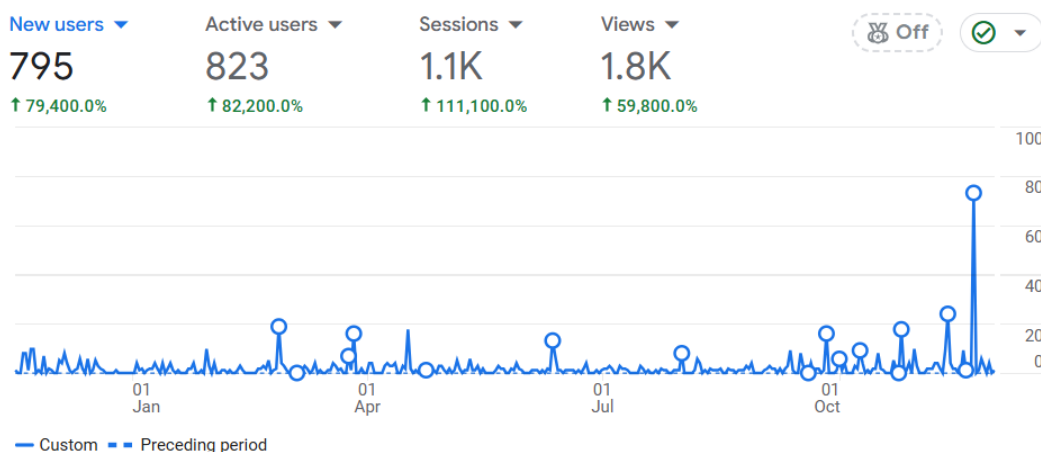
Further details of the overall performance of the website since inception to end of the project are available in *Appendix A*.

To provide a visual for the industry, at the final Coalition Network Meeting in September 2024 a footprint diagram was provided which has been updated with final project statistics. This is available in *Appendix B*.

Some points to note include the uptake of two specific planning domains:

- Operational Planning - 60 entries, and

- Strategic Planning - 56 entries.

These domains focus on staffing needs and their skills and capabilities as well as the legislative frameworks impacting sectors. The uptake of these domains reflects the impact the Workforce Coordination Project had on projects and initiatives addressing recruitment, training and development needs and understanding the frontline workforce. The strategic domain may have had this siginificant uptake due to the rollout of new standards and reporting requirements from the two Royal Commissions and the Commission of Inquiry in Tasmania.

Copies of the questionnaires for these domains are included in *Appendix C*.

See the table below for more information on the entries and views for each domain.

	Status	Title	ID	Entries	Views	Conversion
☐	● Active	The Operational Planning Domain Form.	2	60	389	15.4%
☐	● Active	The Strategic Planning Domain Form.	6	56	462	12.1%
☐	● Active	The Employee Life Cycle Domain Form.	8	8	337	2.4%
☐	● Active	The Organisational Development Domain Form.	7	7	354	2%
☐	● Active	Next Steps Operational Planning Domain Survey	5	4	291	1.4%
☐	● Active	The Strategic Domain	1	0	1	0%
☐	● Active	The Organisational Development Domain	3	0	0	0%

4. Benefits to the Community Services Industry

Taken in conjunction with the other two strategic priority areas of the *Community Services Industry Plan 2021 – 2031,* Local Solutions for Tasmanians and Leading for Impact, the Tool provides an evidence-based approach to considering benchmarking for building a sustainable approach to workforce systems, processes and documentation across the industry.

It provides means to increase capacity to develop locally-based management and governance skills that will support the workforce in the industry.

5. Recommendations

The Review Your Workforce Tool website has been fully operational since November 2023 and in that time has received over 1,800 page views, and had 795 active users. This provides for a forty-four (44%) conversion rate from viewing to actively using one or more of the domains of the Tool. In October and November 2024 there were 98 new users of the site indicating the Tool continues to attract interest and use from the industry.

The Review Your Workforce website will remain active until July 2025 with full online capability.

At the Coalition Network Meeting in September 2024 there was initial discussion that a tool such as this may support agencies to explore employer recognition, such as Employer of Choice. This could be an area of potential for industry to explore.

With the Workforce Coordination Project completed there may be opportunities to consider collaborative approaches to enhancing the Tool to address changes resulting from state and national reviews and inquiries, the feedback from the Neighbourhood Houses conference about appropriate language for small organisations, as well asidentifying new or refined questions to consider areas to support an increasingly multicultural and diverse industry workforce.

The footprint on the following page provides a summary of the outcomes from the work.
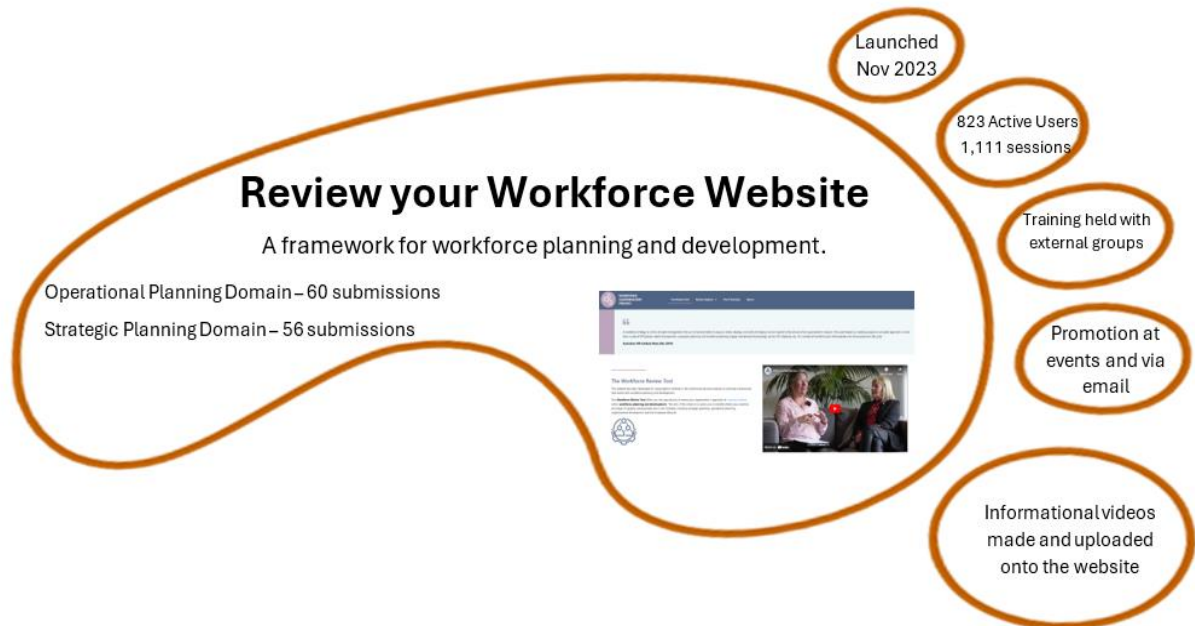
See following pages for appendices.

Appendices

Appendix A - Website Analytics for the Review Your Workforce website from inception to November 2024.

Review Your Workforce Tool Website Analytics - November 2024.

Users

Since the website launch on **17 November 2023**, the Review your Workforce website has had **795 Active Users** (Oct 665) generating **1.1k sessions** (Oct 928) with **1.8K page views** (Oct 1.5K).

Sessions - by Month
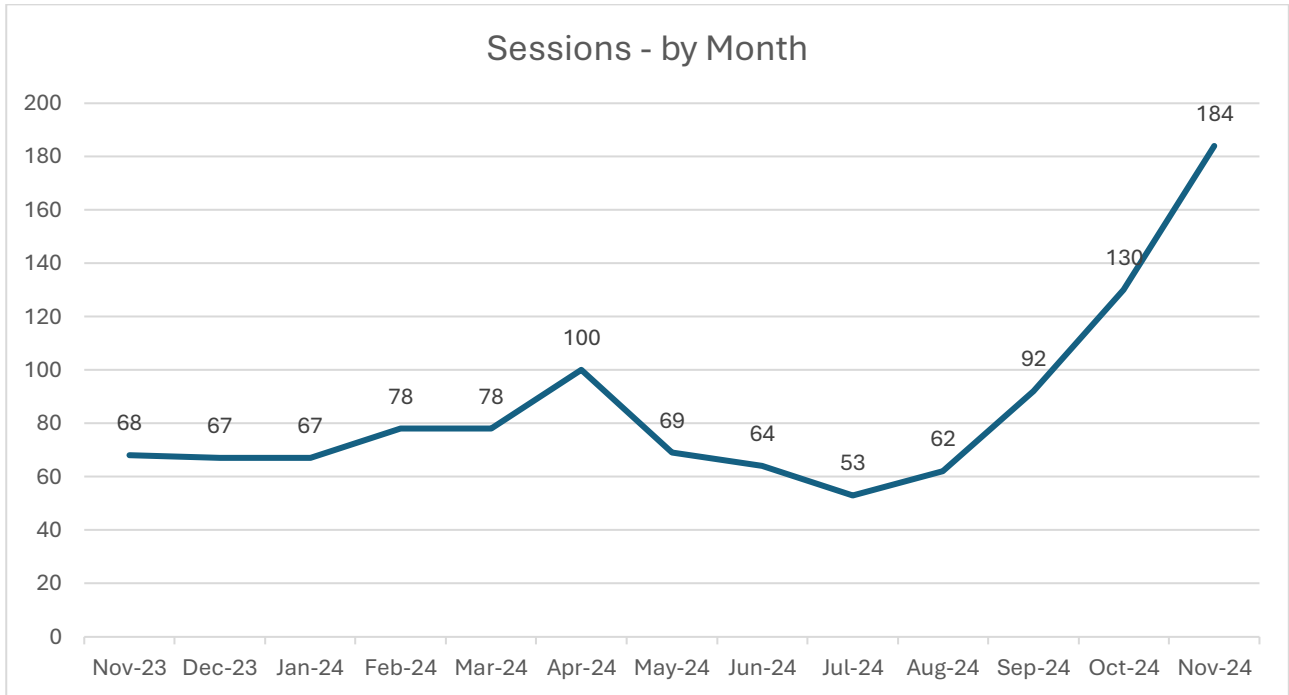
Top Page Views for November

The top pages for November are shown in the table below. Good average engagement time is shown for the Strategic Planning Domain in particular.
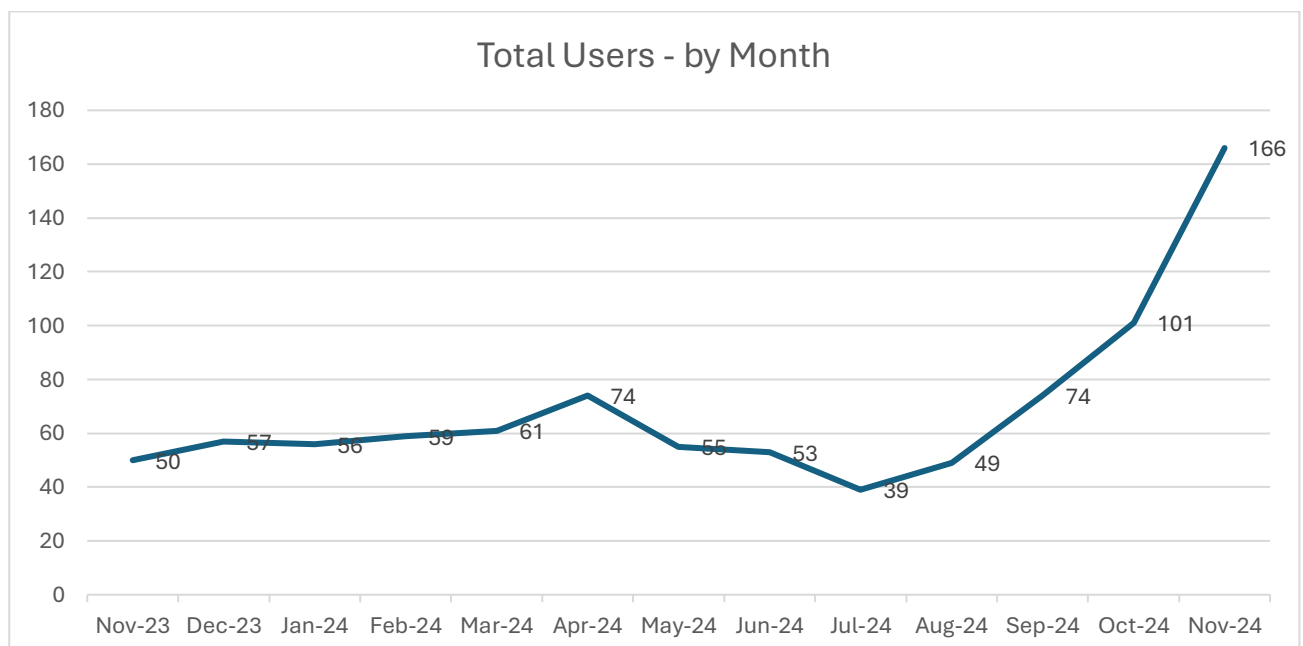
	Page title and screen name ▾	↓ Views	Active users	Views per active user	Average engagement time per active user
	Total	**276** 100% of total	**165** 100% of total	**1.67** Avg 0%	**24s** Avg 0%
1	Review Your Workforce | Is your workforce ready?	155	142	1.09	5s
2	The Strategic Planning Domain | Review Your Workforce	44	8	5.50	4m 49s
3	About | Review Your Workforce	30	13	2.31	16s
4	The 4 domains | Review Your Workforce	27	16	1.69	36s
5	The Organisational Development Domain | Review Your Workforce	7	5	1.40	10s
6	Privacy and disclaimer | Review Your Workforce	5	2	2.50	39s
7	The Employee Lifecycle Domain | Review Your Workforce	5	4	1.25	20s
8	The Operational Planning Domain | Review Your Workforce	2	1	2.00	41s
9	Next Steps Strategic Planning Domain | Review Your Workforce	1	1	1.00	5s

Where did users come from in November?

Once again, in November, the majority of users (133) came from Direct channels - directly typing the website URL into a browser or clicking on a bookmark.

Followed by:

- Organic Search (29) - visitors that find and visit your site via the unpaid listings on search engine results pages

- Referral (12) - via non-ad links from other websites or apps (eg Work with Purpose website).

- Email (5)

- Organic Social (3)

	Session primary...channel group) ▾ ➕	↓ Sessions	Engaged sessions	Engagement rate	Average engagement time per session
	Total	184 100% of total	43 100% of total	23.37% Avg 0%	22s Avg 0%
1	Direct	133	16	12.03%	7s
2	Organic Search	29	17	58.62%	39s
3	Referral	12	6	50%	2m 19s
4	Email	5	2	40%	1m 10s
5	Organic Social	3	2	66.67%	2s
6	Unassigned	2	0	0%	7s

Referral sources.

The graph below shows where the main referrals to the site came from for the month of November.
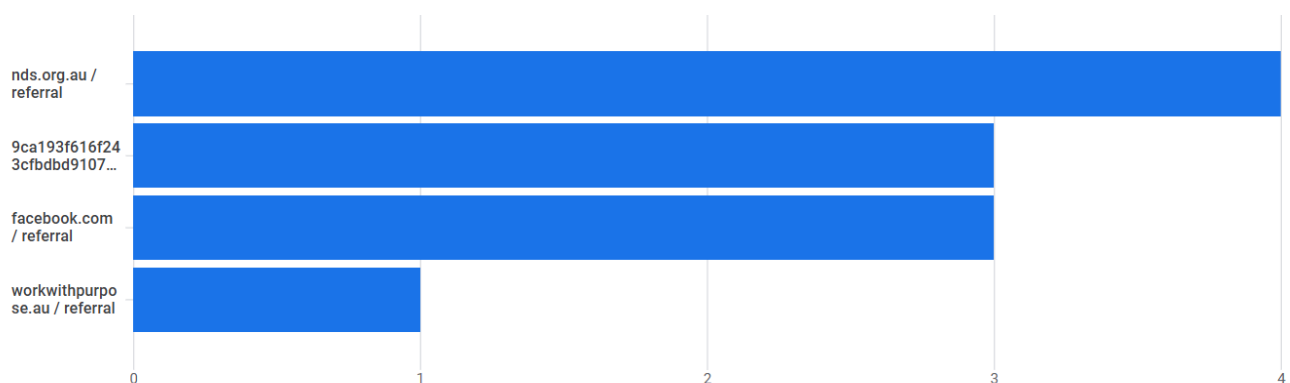
Total Website Submissions

The timing of this report means it is not possible to distinguish between October and November views, hence the views below are the same as October. However, we can identify that there was a domain completed in November.

- Operational Planning (60 entries) – 389 Views (Sep – 343)

- Strategic Planning (56 Entries) – 462 Views (Sep – 403)

- Employee Life Cycle (8 entries) – 337 Views (Sep – 291)

- Organisational Development (7 Entries) – 354 Views (Sep 307)

- Next Steps Operational Planning Domain Survey (4 Entries) – 291 Views (Sep – 268)

	Status	Title	ID	Entries	Views	Conversion
☐	● Active	The Operational Planning Domain Form.	2	60	389	15.4%
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November activity

There was one 1 completion done in November; it was in the Strategic domain.

<u>Appendix B</u> - Workshops provided to Neighbourhood Houses Conference September 2023

NHT Conference September 23 – Workforce Development Proposal

1. Wednesday 20 September: 2.00-3.30pm

Peer support session for project officers. One hour session.

Sharing support with people in similar roles is a way to increase learning and development through warm discussion of ideas for best practice and by building connections with others. Peer support improves wellbeing and helps consolidate decision making processes – especially around thorny issues. It can also show how much you already know!

As a lead into exploring the Introduction to the Review Tool session, Workforce Coordination Project Senior Officers, Sue Howard, and Dr Lauren McGrow will present a peer-based support session for NHT project workers. The following will be addressed.

- What is peer support?

- What are the potentials and pitfalls of a supportive network?

- Ground rules for supporting peers.

- What can it look like?

- Giving it a go.

This session will draw on the voices of project workers to open a space for peer support using an interactive framework for mutuality. Whether you've been a project worker for 10+ years or started yesterday, peer support offers a way for leaders to reduce feelings of isolation, increase a sense of accomplishment and wellbeing and access collective wisdom to address complex issues. This in turn can contribute to workplace wellbeing, on the job learning, and staff retention.

2. Thursday 21 September: 2.05-2.35pm.

Workforce Development Review Tool introduction and discussion.

This workshop will present a short introduction to an online review tool developed for the purpose of workforce planning and design within community services, Tasmania. The tool provides an approach to capacity building that supports leadership to reflect on, and rate their workforce performance, in each of the following domains:

- Strategic domain

- Operational planning domain,

- Organisational development domain and,

- The employee lifecycle domain.

Workforce planning and development reaches across a range of interlinked People and Culture (HR) processes and includes several steps related to each domain. By choosing one or two areas to focus on, houses can develop achievable strategies to address any workforce gaps and align current and future workforce needs with the realities of the Tasmanian situation. Asking questions like the following can assist leaders to finetune their workforce planning and design processes in a highly competitive environment.

- Which domain do you think will make the biggest difference and should become a priority?

- What would be a realistic goal for the next 12 months?

Explore the Review Your Workforce Tool here.

Workforce Planning and Development Capability and Capacity Review Tool

1	In the strategic planning domain	Practice (P)				Document-ation/ Systems (DS)				N A
1.1	We define our organisation's strategic direction* *Organisational strategies are determined by:* · *External political, economic, social, and technological changes.* · *Organisational objectives and direction in the context of the vision, mission, and values.* · *Service user expectations.* · *Financial factors such as funding models, growth, and income projection.* · *Operational imperatives, e.g., what are the projected demands around (geographical) service delivery requirements and policy?*	1	2	3	4	1	2	3	4	
1.2	We define our organisation's desired culture** *** The key to a successful organisation is to have a culture based on a strongly held and widely shared set of beliefs (values and principles) supported by strategy, structures, and behaviours.*	1	2	3	4	1	2	3	4	
1.3	We gather the following strategic workforce information									
A	We gather relevant workforce profile data, e.g., numbers, service areas, location, diversity, impending retirements.	1	2	3	4	1	2	3	4	
B	We keep abreast of workforce related policy and legislative changes, e.g., Awards, Fair Work decisions.	1	2	3	4	1	2	3	4	
C	We understand what matters to the current workforce to stay engaged, e.g., undertake employee surveys, have one on one conversations.	1	2	3	4	1	2	3	4	
D	We understand what mattered to the leaving workforce, e.g., conduct exit interviews.	1	2	3	4	1	2	3	4	
E	We gather information on target future workforce (demographic/generations) to be attracted, e.g., generic research on generational trends and expectations.	1	2	3	4	1	2	3	4	
F	We understand what matters to clients/service users regarding the workforce, e.g., undertake client and family surveys, one on one conversations.	1	2	3	4	1	2	3	4	
G	We understand the culture overall***, and/or in specific department/programs, e.g., employee and client surveys conducted. *** The key question is: Are the collective norms that have formed (behaviours and practices) aligned with how we would like it to be within the organisation?*	1	2	3	4	1	2	3	4	

			1	2	3	4	1	2	3	4	
H	We have a picture of the leadership capacity and capability to engage with people and achieve organisational results, e.g., collated data from one-on-one conversations, employee surveys, performance reviews, KPI's achieved.		1	2	3	4	1	2	3	4	
I	We seek to understand the effectiveness of our organisational structures and designs that may enable or prevent people from achieving organisational results, e.g., collated data from individual conversations, reviews, and surveys.		1	2	3	4	1	2	3	4	
J	We research best practice principles in relation to recruitment, retention, and developing the workforce, e.g., current HR advice and innovations.		1	2	3	4	1	2	3	4	
1.4	**Volunteers**										
A	We consider our volunteer workforce across all elements of the strategic planning domain.		1	2	3	4	1	2	3	4	
1.5	**We align workforce strategies with organisational strategies**										
A	We consider workforce data/information and strategies when formulating our organisations strategic direction.		1	2	3	4	1	2	3	4	
B	We ensure strategic directions informs all aspects of workforce planning and development.		1	2	3	4	1	2	3	4	
1.6	**We monitor and evaluate our efforts**										
A	We regularly evaluate and adjust our strategic planning processes.		1	2	3	4	1	2	3	4	

Before finishing the review of this domain please answer the following three capacity questions		Not at all	To some extent	To a great	Very much so	Priority moving
1	We have clarity about who is responsible and accountable for each element of the **strategic planning** domain.					
2	We allocate sufficient resources to **strategic planning** processes.					
3	We have collaborations in place that assist us to achieve our objectives e.g.: · Leverage information and resources that have been made available by other organisations. · Partner with other organisations to address workforce issues. · Collaborate with sector partners to address and develop workforce strategies.					

2	In the operational planning domain	Practice (P)				Document-ation/ Systems (DS)				NA
2.1	**We identify the following workforce needs in the context of strategic organisational analysis and decisions**									
A	We identify critical roles for achieving set objectives which includes identifying and facilitating solutions.	1	2	3	4	1	2	3	4	
B	We identify staffing numbers to meet current and future service demands, which includes identifying and facilitating solutions.	1	2	3	4	1	2	3	4	
C	We identify specific geographical workforce demands and gaps, which includes identifying and facilitating solutions.	1	2	3	4	1	2	3	4	
D	We identify and work with capability standards for all job levels of the organisation e.g., capability frameworks, performance indicators, success measures.	1	2	3	4	1	2	3	4	
E	We understand and have strategies in place to keep abreast of relevant compliance and legislative requirements, e.g., mandatory training, procedures.	1	2	3	4	1	2	3	4	
F	We oversee and facilitate workforce movements e.g., commencements, finishing dates, change of roles, change of status, backfilling positions.	1	2	3	4	1	2	3	4	
G	We identify diversity and inclusion needs, which includes identifying and implementing strategies for achieving desired objectives.	1	2	3	4	1	2	3	4	
H	We identify skills gaps within the current workforce and across all services, which includes facilitating solutions for closing those gaps.	1	2	3	4	1	2	3	4	
I	We identify and map future workforce needs in line with organisational needs, which includes identifying and implementing strategies for achieving desired objectives.	1	2	3	4	1	2	3	4	
2.2	**Volunteers**									
A	We consider our volunteer workforce across all elements of the operational planning domain.	1	2	3	4	1	2	3	4	
2.3	**We monitor and evaluate our efforts**									
A	We regularly review, evaluate, and adjust our operational workforce planning processes.	1	2	3	4	1	2	3	4	

Before finishing the review of this domain please answer the following three capacity questions		Not at all	To some extent	To a great extent	Very much so	Priority moving forward
1	We have clarity about who is responsible and accountable for each element of the **operational planning** domain.					
2	We allocate sufficient resources to **operational planning** processes.					
3	We have collaborations in place that assist us to achieve our objectives e.g.: · Leverage information and resources that have been made available by other organisations. · Partner with other organisations to address workforce issues. · Collaborate with sector partners to address and develop workforce strategies.					