

### Overview

This unit is about taking a lead in identifying the workforce requirements of your organisation and how these will be satisfied. It involves considering the strategic objectives and plans of the organisation to decide whether the workforce should be expanded, maintained or contracted.

It also involves considering whether there is an appropriate mix of people to achieve the organisation's objectives, and whether any problems with this can be sorted out by recruiting staff, moving staff to other positions or making staff redundant.

'Workforce' covers any person who works for the organisation. Colleagues do not have to be directly employed as there is a wide range of contractual arrangements which could be used to provide the people the organisation needs, and part of the planning process is to decide how this is managed.

For the purposes of this unit, an 'organisation' can mean a self-contained entity such as a private sector company, a charity or a local authority, or a significant operating unit, with a relative degree of autonomy, within a larger organisation.

The unit is recommended for senior managers.

This unit is closely linked to units:

B3 Develop a strategic business plan for your organisation

B4 Put the strategic business plan into action

D3 Recruit, select and keep colleagues

in the overall suite of National Occupational Standards for Management and Leadership.

If your organisation is a small firm, you should look at unit *J1 Review your staffing*, which has been developed by the Small Firms Enterprise and Development Initiative (SFEDI) specifically for small firms and which maybe more suitable to your needs. You can obtain information on the unit from SFEDI on tel. 0114 241 2155 or at the SFEDI website ([www.sfedi.co.uk](http://www.sfedi.co.uk)).

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### Performance criteria

- You must be able to:*
- P1 evaluate the organisation's strategic objectives and associated plans to obtain information needed for workforce planning purposes and identify any key issues for further consideration
  - P2 identify the type of skills, knowledge, understanding and experience required to undertake current and planned organisational activities
  - P3 review capacity and capability of the current workforce to meet identified skills, knowledge, understanding and experience requirements
  - P4 seek and make use of specialist expertise to assist in workforce planning activities, as necessary
  - P5 specify workforce requirements that are capable of achieving the organisation's objectives
  - P6 make sure that the organisation has a diverse workforce which provides a suitable mix of people to achieve its objectives
  - P7 make sure the cultural needs and requirements of your workforce are considered to maximise efficiency for the organisation
  - P8 develop plans that meet the organisation's long, medium, and short-term requirements, making best use of people from inside and from outside the organisation
  - P9 ensure a mix of full-time, part-time, temporary and contractual workers appropriate to the needs of the organisation
  - P10 make sure that resources needed to recruit, keep and redeploy people are available
  - P11 make sure that plans incorporate contingency arrangements to deal with unforeseen circumstances and maintain business continuity
  - P12 communicate workforce plans to relevant people for information

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### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 what an effective workforce plan should cover
- K2 the information required to undertake workforce planning
- K3 sources of specialist expertise in relation to workforce planning and how to make use of them
- K4 legislation and requirements relating to employment, workers' welfare and rights, equality and health and safety
- K5 how to take account of equality, diversity and inclusion issues in workforce planning
- K6 strategies and/or services which need to be in place for when people leave, including redundancy counselling
- K7 the importance of putting contingency arrangements in place and how to do so effectively
- K8 how a multicultural and international workforce can benefit the organisation
- K9 the different ways in which workforce requirements can be met, their advantages and disadvantages, costs and benefits

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K10 types of employment agreements typically used within the industry/sector
- K11 patterns for employing, recruiting, and keeping people in the industry/sector
- K12 trends and developments in the sector which are relevant to workforce planning
- K13 legislation, regulations and codes of practice that apply in the industry/sector
- K14 working culture and practices of the industry/sector

*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K15 the organisation's vision, strategic objectives and associated plans, structure, values and culture
- K16 employment agreements with people working in and for the organisation
- K17 the capacity and capability of the current workforce
- K18 the diversity of the organisation's workforce
- K19 factors affecting workforce planning in the organisation
- K20 local employment market conditions
- K21 employment policies and practices within the organisation – including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions

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### Additional Information

#### Behaviours

1. You recognise the opportunities presented by the diversity of people.
2. You are vigilant for potential risks.
3. You identify systemic issues and trends and recognise their effect on current and future work.
4. You anticipate likely future scenarios based on realistic analysis of trends and developments.
5. You take decisions in uncertain situations or based on incomplete information when necessary.
6. You take and implement difficult and/or unpopular decisions, if necessary.
7. You work towards a clearly defined vision of the future.
8. You use communication styles that are appropriate to different people and situations.

#### Skills

Listed below are the main generic 'skills' that need to be applied in planning the workforce. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

Analysing  
Balancing competing needs and interests  
Communicating  
Contingency-planning  
Decision-making  
Evaluating  
Information management  
Monitoring  
Planning  
Prioritising  
Thinking creatively  
Thinking strategically

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<b>Developed by</b>	CFA Business Skills @ Work
<b>Version number</b>	1
<b>Date approved</b>	March 2009
<b>Indicative review date</b>	March 2011
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	Management Standards Centre
<b>Original URN</b>	D4
<b>Relevant occupations</b>	Business, Administration and Law; Managers and Senior Officials; Operations Manager; Arts, Media and Publishing; Librarians and Related Professionals; Crafts, creative arts and design; Quality and Customer Care Managers; Artistic and Literary Occupations; Customer Service Occupations;
<b>Suite</b>	Management and Leadership National Occupational Standards 2008; Cultural and Heritage Venue Management; Animal Technology;
<b>Key words</b>	management, leadership, communicating, planning, evaluating, prioritising, monitoring, analysing, decision-making; venue;