

CATHOLIC CHARITIES INDIANAPOLIS INC.  
AGENCY POLICIES AND PROCEDURES

Policy Name:	<b>Human Resources Planning</b>
Domain:	<b>Human Resources 2.1</b>
Effective Date:	<b>2001</b>
Dates of Revision:	<b>04/03; 04/09; 8/12; 11/15; 2/16; 5/19; 4/23</b>
References:	<b>Workforce Assessment Planning Touchpoint</b>

**POLICY:** Catholic Charities Indianapolis assesses the type and number of personnel needed to accomplish its mission, goals and objectives.

**PROCEDURES:**

CCI assesses its workforce as part of ongoing budget management and prepares for future needs by annually completing a *Workforce Assessment Planning touchpoint in ETO* that:

- a. Compares the composition of its current workforce, including number of employees, skills, and demographics, with projected workforce needs.
- b. Determines how to close gaps, when possible, through recruiting, training, or outsourcing
- c. Analyzes employment patterns and when the cultural characteristics of personnel do not generally reflect those of the service population, implements a plan that establishes goals for recruitment, employment, and promotion and includes timetables for correction.
- d. Is submitted by the Program Directors/Service Line Directors on or around the time of the annual budget.
- e. Is aggregated and reported as part of the annual PQI report.

  
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David J. Bethuram  
Executive Director

  
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Date

# Catholic Charities Indianapolis Workforce Assessment Planning Worksheet

## Instructions

This tip sheet provides guidance on conducting the workforce assessment touchpoint required for Human Resources Planning.

### Step 1: Analysis of Current Workforce

1. Develop skills inventory for each staff member (list all skills each employee has demonstrated, their education level, and performance review data)
  - a. Assess the number of employees in each position and the need for additional employees in each position;
  - b. Assess the turnover rate of employees in each position;
  - c. Assess the number of employees that have the required education and skills required for each position;
  - d. Assess the performance review results for each position.
2. Review current staff demographics to determine whether they reflect the service population and identify needed diversity objectives.
3. Review termination (voluntary and involuntary) data and reports -
  - a. Where did they go?
  - b. Why did they leave?
  - c. What was the impact on current employees about the departures?
4. Review recruitment data (What are the resources and activities used to recruit new staff?)

### Step 2: Evaluate the Needs for the Future

5. What positions will we need to fill in the coming year?

Program	# Current Unfilled Positions	# Anticipated New Positions	Total Projected Positions Needed
Total for All Departments			

6. What are the budgeting implications?
7. Are there enough supervisors/managers?
8. Can any jobs be consolidated? Cross training?
9. Any changes in technology that require specific skill set?

10. What processes can be done more efficiently and effectively?
11. What are the organization's diversity objectives?
12. What are the knowledge, skills and abilities needed to perform anticipated jobs?

**Step 3: Identify and Close Gaps (compare what you have and what you need)**

13. For each position, determine how to close gaps (through recruiting, training, promoting, or outsourcing)
14. Establish goals and timeframes for recruitment, employment, and promotion
15. Can we provide work opportunities that retain employees (enhanced benefits, career advancement, professional development opportunities)
16. Analyze needs rather than just filling positions in the same way
17. Research current labor market

Sample Workforce Assessment - [Program]				
Program Objectives /Needs	HR Considerations	Identify any gaps (Does the program have the staff resources it needs to achieve its goals?)	Are there any risks associated with not addressing the gap?	Proposed Solutions
<b>For example:</b> Special projects or goals for the coming year	Specialized skills needed or training for specific positions/ projects	Yes/No	How would this gap impact service delivery? Administrative functioning?	<ul style="list-style-type: none"> <li>▪ Recruit new staff</li> <li>▪ Restructure programs</li> <li>▪ Outsourcing</li> <li>▪ Collaboration with external providers</li> <li>▪ Staff training/ development</li> </ul>

Prepared by: \_\_\_\_\_ Date: \_\_\_\_\_