

Workforce Planning Questionnaire



1. Does our organization have a strategic plan or vision for the next five to ten years that outlines our direction and focus? Yes No

Next steps in achieving a strategic plan: _____

Responsibilities: _____

2. Will the workforce we have today be capable of meeting our strategic goals in the next five to ten years? Yes No

Skills needed will: Change Stay the same
Size of workforce will: Change Stay the same

Define specific capabilities that are not available today but will be needed in the future.

Define specific capabilities and jobs that are required today but will not be necessary in the future.



3. If new skills or an expanded workforce will be required in coming years, do we have a clear idea of where those workers will come from? Yes No

What steps will we need to take to locate and attract the workers we will require?

4. How many employees will be retiring in the coming five years? _____
How many employees will be retiring in the coming ten years? _____

Is there a plan in place to replace them? Yes No

5. Do we have a succession plan for all key employees/positions? Yes No

6. If key individuals left today, what challenges would we face in replacing them?

a) Level of difficulty anticipated in finding right mix of skills and experience _____

b) Estimated time involved in finding replacements _____

c) Estimated cost of finding replacements _____

d) Estimated time in training replacements _____



e) Estimated cost of training replacements _____

Steps we must take to begin/continue succession planning:

7. Do we have any retention strategies in place to keep experienced and valued workers? Yes No

○ What actions can be taken to keep our high quality, experienced workers for as long as possible?

8. What are the opportunities and barriers facing workers who may wish to stay after their official retirement:

Must they retire and be hired back? Yes No

Will their pension benefits be negatively affected? Yes No

Will they lose seniority or benefits? Yes No

What changes can we make to make it easier for workers to stay past 65?

Will those changes allow us to differentiate between employees we wish to retain and those we do not wish to retain? If not, are there actions we can take to allow differentiation?

9. Are there skills or jobs that will no longer be needed in the future? Yes No

Do we have a plan and cost assessment in place for making those changes? Yes No

○ What actions can we begin to take today to prepare those individuals or the company for the time when those skills are not needed?

10. What will be our greatest challenges in retaining and recruiting the workers we need?

11. Do we have an organizational culture that makes our company an employer of choice? Yes No

What changes can we make to strengthen our culture to make our company an employer of choice?

12. Are we ready to begin to build a plan to meet our future workforce needs? Yes No

If not, what information do we need, or what actions need to be taken to prepare ourselves.

13. What steps should we take to communicate our plans to key stakeholders – employees, unions, etc?

○ 14. What outside resources are available for assistance in workforce planning?

