**School Workforce Plan Template**

This sample template provides Victorian schools with a tool to gather workforce planning information. It provides a suggested format for collecting and structuring a workforce plan and highlights the types of information schools could collect to inform workforce decision making. In many cases it suggests sources of information and/or provides prompting questions and suggestions of information to include. You may choose to use the table format provided in the template or use the headings in a report format.

The template is based on the Workforce Planning Guide (see [Workforce Planning for Schools: Policy and Guidelines)](https://www2.education.vic.gov.au/pal/workforce-planning-schools/policy-and-guidelines) to support Principals in shaping a school’s workforce profile and structure to achieve its strategic goals and priorities. Workforce planning may look different at each school depending on the unique context and operating environment.

Each step is indicated in the template by its colour in the framework diagram. It may not be necessary to identify these steps in your final workforce plan; however, they are provided in the template to guide you through the framework.

Some schools will feel comfortable undertaking workforce planning by themselves, and other schools will collaborate with ‘like’ schools or schools in their network or region to assist each other to develop their workforce plan. Others will involve their regional office. The approach is up to the school and Principal.

**School Workforce Plan Sample Template with tips for completion**

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| **Example of headings** | ***Suggested information to include for each heading*** |
| **Executive Summary** | *If required* |
| **Workforce Planning Framework Stage 1 - Analysing workforce needs** |
| 1. **Introduction:**
 | Why are you are embarking on the development of a workforce plan now? |
| 1. **Strategic background and school context.**
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| **School Profile** | Background about your school such as age, size, history, location, any characteristics of your students, staff or curriculum; what are you known for and/or what are you planning. Other things may include your infrastructure (i.e. new buildings, portables, etc.) that are important characteristics of your school.***Information source: School Strategic plan*** |
| **School Purpose** | ***Information source: School Strategic plan*** |
| **School Values** | ***Information source: School Strategic plan*** |
| 1. **Environmental context**
 | ***Key Information source: School Strategic plan*** The environmental scan aims to describe your current situational context, drivers of any change, and emerging conditions that may impact on your school in the next 3 – 5 years.**Describe your community profile**, its key features and any changes that may impact on what services you need to provide. This could include, for example, a rise in people migrating to your community from interstate or overseas; increase or decrease in birth rates; new housing estates/ growth area, stable or in decline; changes in the main industries that your community are involved with; etc. There is a list of possible sources of data about your local community at the end of this template. These provide quick access to a range of community profiles which you can use straight away for your workforce plan.In some cases, the population profile and projections data have been based on a previous ABS Census of Population and Housing and may be out-dated, so it is important to supplement the official data with other sources to capture more recent local population trends, particularly in areas of strong growth or decline. Information from crèches, kindergartens and real estate agents may point to recent changes in your local population.Describe the following and any key factors that might influence them:**School enrolments:** You may consider including not only enrolment numbers but any other features of your student cohorts for example refugees, socioeconomic status (SES), changes in enrolments in any particular year levels, locations the students are coming from/distance travelled, any enrolment trends over time. Are your enrolments growing, declining or stable? Has this changed in the last 3 – 5 years? **Demand for different types of staff** This could include any anticipated change in curriculum delivery, special programs, facilities, school policies that are planned in your school’s strategic plan that will potentially impact on the types of staff and number you may need, including your leadership profile.**Demand for specific specialist skills** This could include IT to support a new laptop program, literacy and numeracy support, language specialists, special education, etc. It could include education support staff.**Availability/supply of different types of staff** Do you anticipate upcoming retirements, downsizing, increase in family leave; increase in need to supervise student teachers or other things that will impact on how much work your staff can do?*Suggested data sources: the school strategic plan, reports from school reviews, enrolment trend data, local government community profile and projections, ABS population projections, the Department’s Teacher demand and supply report; school and Department’s policies; any workforce and service delivery data available from the Department’s regional office.**Note: Care should be taken to discuss the staffing issues your school faces frankly and respectfully. Names of staff members should not be included; however, it will be necessary to refer to job roles or titles in the document.* |
| **Workforce Planning Framework Stage 2 - Gather Data** |
| 1. **Workforce profile:**

 **Overview** | Provide a snapshot of the school’s workforce using quantitative and qualitative data. Remember to describe your total workforce, including non-teaching staff and volunteers. Some suggestions for what to include in your workforce profile data include: Quantitative sources* Current workforce (numbers FTE and headcount) by role/subject areas, classification levels and employment mode.
* Number of funded positions (you might breakdown by classification).
* Number of funded vacancies (you might breakdown by classification).
* Workforce characteristics (gender, age, length of time in school and in education sector, classification levels; proportion of workforce in beginning, mid and established career stages; breakdown by staff type e.g. Teaching, specialist support, allied health, other non-teaching, volunteers).
* Workforce employment arrangements (full time, part time, job sharing, phased retirements).
* Mobility trends (number of staff exits in last 12 months and reasons for the exits e.g. promotion, resignation, parental absence; numbers of new entries, including return from parental absence, leave without pay and new staff); previous years trends if available.
* turnover (breakdown by all staff, mission critical and hard to fill job groups)
* Projected long term leave – more than 28 days (long service, parental absence, personal leave, and leave without pay).
* Personal leave, work cover and attrition rates and patterns.
* Numbers of pre-service teachers and other students undertaking training or work-placements in your school.

Qualitative * Level of staff interest in promotions and upgrading skills (from interviews, conversations).
* Professional development needs analysis, including professional development undertaken by staff in recent years as an indicator of new capability.
* Staff working life intentions (e.g. via a survey).

You may also consider examining the number of staff who have been involved in recruitment and retention initiatives such as scholarship programs, and/or have received retention bonuses to determine if these strategies have been successful for your school.***Data Sources: Student Resource Package Staff Budget Planning tool, Payroll report, Staff Opinion survey, a working life intentions survey (if you conduct one).***Once you have gathered the relevant data and examined it, describe what you have found in your workforce plan and use the data to illustrate your findings. Ensure you discuss roles rather than individual people.*For example: Upon examination of our workforce profile, we found that 30% of our maths faculty were over 55 years old. This led us to believe that the school may have a workforce issue with maths in the coming 5 years. However, when asked about their retirement intentions, only one quarter of this group indicated they would retire in the next 5 years. The remainder varied in their planned retirement, however half indicated that they hoped to continue working for 10 years. The final quarter indicated that they would be hoping to consider a phasing into retirement by reducing their time fraction over an extended period (Insert table with age profile by faculty area to illustrate your points).* |
| **Workforce Planning Framework Stage 3 – Analyse Supply Gaps** |
| **Workforce profile:****Mission critical roles** | **Projected Demand and Supply****This section is designed to assist you to articulate which roles you consider are critical to your school meeting its objectives.**Definitions:**Mission Critical Job Group**: If you cannot retain or attract employees for these job groups you are at risk of not being able to meet your regulatory or legislative requirements or deliver the service/s you have planned to deliver.**Hard to fill**: There are enough people with the skills and qualifications to do this work but for a variety of reasons they are choosing not to work in this job group.It is suggested that for each hard to fill role you describe the job role required, how this links to your strategic objectives, and the size of the problem and when the problem will occur. You might also like to examine the unexpected resignations in these job roles in recent times to understand more about what might be likely to occur in your school in the future.Add as many job roles as necessary for your circumstances. |
| Role: | *For example: Classroom teacher year 8 – 10 Italian* |
| Link to Strategic Intent and target: | Refer to your strategic plan – In this section it is suggested that you explain why these are mission critical roles or workforce segments in relation to the school’s strategy and targets. |
|  |  | 2024 | 2025 | 2026  | 2027 | 2028 |
| *For example: Year 8-10 LOTE teacher (Italian)* | Projected demand *(how many of this job group will you need each year? This is your ‘best guess’ and should be revised as circumstances change)* |  |  |  |  |  |
|  | Projected supply (*for example how many have you got now? how many do you think you will be able to attract? are any likely to leave you over the time period?)* |  |  |  |  |  |
|  | Projected supply gap *(difference between demand and supply)* |  |  |  |  |  |
| Comments: *provide some summary of your analysis and conclusions drawn from the data you have examined.* |
| Role: | Repeat for other critical job roles that you have identified. |
| Link to Strategic Intent and target: | Refer to strategic plan – In this section it is suggested that you explain why these are mission critical roles or workforce segments in relation to the schools strategy and targets. |
|  |  | 2024 | 2025 | 2026  | 2027 | 2028 |
| *For example: Senior Maths teachers* | Projected demand |  |  |  |  |  |
|  | Projected supply |  |  |  |  |  |
|  | Projected supply gap |  |  |  |  |  |
| Comments: *provide some summary of your analysis and conclusions drawn from the data you have examined.* |
| **Workforce Planning Framework Stage 4 – Identify workforce strategies** |
| 1. **Workforce and Development Strategies.**

*In this section lay out what strategies you would like to use to tackle the workforce issues you have identified previously in the plan, and who will be the target of your strategies. Only use the sections that are appropriate to you.*  |
| **Area** | **Workforce Strategy***(What will you do, how will you do it and how much is it likely to cost? Which of your school’s strategic goals does this workforce strategy support? Consider what will happen if you don’t have a workforce strategy for this identified issue).* | **Target***(i.e. who, how many, for which job role, and when will you do it)* |
| Attraction | * *For example - Set up a local shared CRT database/network with other schools in my area to attract quality CRT’s available with the skills our school needs, especially for XYZ subject areas, year levels or other need.*
* *Dealing with unexpected resignations in key areas.*
 | *For example: Establish a working group. Employ additional business management resources (0.1) per week to establish database. Managed by Assistant Principal X.* |
| Recruitment and selection | * *For example - Target teachers participating in return-to-teaching programs.*
* *For example – Recruitment of more experienced teachers to work with our mostly graduate/beginning teacher workforce profile is needed. Recruitment of these teachers will include their ability to work well or adapt to working in open learning spaces and with the emerging technology. Our specific recruitment and selection strategies will include XXXX.*
 | *For example: new entry staff.**For example: How many staff will you be looking for with these skills?* |
| Retention | * *For example - Explore developing a shared mentoring program for graduates between local primary schools in area.*
* *For example - Explore level of interest in changed working arrangements e.g. full to part time.*
 | *Transition to retirement workers and/or workers with carer responsibilities.* |
| Job design/re-design | * *For example - Explore alternative options for delivering the language program by using local community members who are native speakers to support classroom language teachers. Undertake research to determine how other schools have approached this, and then plan an approach with the language faculty, with implementation timeline.*
* *For example – Increase the understanding of education support staff about how their role supports teaching and learning across the school through the provision of professional development sessions, development of detailed role descriptions and reference to policies. PD sessions will be attended by all ES Staff over a 6 month period*.
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| Development | * *For example - Explore developing a local staffing cooperation model to share staff resources and costs across schools (i.e. temporary transfer, split time fractions across schools).*
 | *Experienced teachers.* |
| Planned attrition(retirements, exits) | * *For example – Investigate options and implement a whole school approach to phased retirements. This may include reductions in time fractions and use of experienced teachers as mentors.*
 | *Ageing workforce- initially targeting those subject areas that are expected to face the most attrition in the next two years.* |
| **Workforce Planning Framework Stage 5 – Monitor and evaluate** |
| 1. **Reporting, Monitoring and Review of workforce plan**
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|  | * What are your plans to disseminate the information in your workforce plan across your school, your school community, the school consultative committee and broader (i.e. within your school network and region)?
* How will you use the workforce plan to monitor your workforce strategies to see if they are working? What reporting mechanisms will you use/establish?
* How and when will the workforce plan be reviewed (for example in conjunction with the development of a new strategic plan? With the development of the school’s annual implementation plan)?
* How will improvements in workforce planning processes come about?
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Finalising your workforce plan will include decisions about whether you can afford your planned workforce strategies, and when the best time is to begin implementing them. You can use the SRP Planner tool to examine different workforce scenarios to determine their affordability.