**Governing entity:** Workforce Planning Board (see Charter)

**Who will use SOP:** Members of the RLT

**Timeframe for use:** (see phases: some annual, some monthly)

**Need:** Current process is confusing; desire for increased efficiency; new technology is available; more people are involved than before.

**Purpose:** Give the Region a strategic, corporate workforce optimization, which includes annual assessment of workforce needs, review of new positions, and a comprehensive and integrated approach to the Region’s workforce capacity (HR, G&A, Contracting, Partnerships, and volunteers).

**The annual cycle of the workflow involves four phases:**   
Phase 1: Annual Strategic Workforce Prioritization (RLT)

Phase 2: Position Input (Forests and Directors)

Phase 3: Assessment of Regional Workforce Optimization (Board)

Phase 4: Data Collection for Annual Review/Planning (Board).

NOTE: Where does the Board develop the integrated workforce capacity process as called for in the Strategic Plan?

**Phase 1: RLT Strategic Workforce Prioritization**

Step 1. RLT members meet once per year to review the Agency’s emphasis areas in the context of the Region’s Strategic Plan, and identify Regional workforce needs and the skill gaps for the upcoming year – establish ranking criteria.

Step 2: RLT members annually establish priority positions/skills to fill, using established criteria in a web-based system.

Phase Milestone: Rating of positions/skills based on Regional criteria.

**Phase 2: Position Input**  
Position proposed entered into database by Forest Supervisors/Administrative Officers and Directors/Deputies. Web-based platform will ask prompting questions that include position description and location, in addition to criteria for consideration, such as:

* Reason for addition: new initiative, skill gap, realignment, etc.
* What is the gap between current organization and needed skills to accomplish work?
* Additional salary and expense costs to add this position?
* Anticipated need/cost for next 5 years?
* What is the unit’s ratio of fixed costs vs. discretionary?
* Unit’s attrition rate?
* Is this position unusual for like organizations?
* What existing workforce strategies did you consider to alternatively leverage and address the skill/capacity gap? (partner, shared or zoned position, contract, etc.) Why were these options not utilized?
* [Add in wording from “new position” in Charter.]

Step 1. Units input request (position information, ranking, justification/narrative) utilizing automated format for consistency and efficiency. Input will be automated and unified with current HR automated position request process

Step 2. Data is augmented by Budget/HR (again using automated tool)

Step 3. Data validation of the month’s position inputs (TBD by whom)

Phase Milestone: The month’s proposed slate to Workforce Planning Board

**Phase 3: Assessment of Regional Workforce Optimization**

Step 1. Workforce Planning Board Assessment

Reviews for the following:

a) Does it support/align WO and Regional Strategic Plan priorities?

b) Does it optimize the Region’s workforce?

b) Is there a funding source?

c) Other specific criteria for year (e.g.: FTE risks)

d) Add: address backlog in the system (2+ yr positions)

Note: when the Board considers positions for a unit or directorate that is represented by a board member, that member will recuse him/herself.

Step 1 Milestone: Recommended slate delivered to the appropriate DRF

Step 2. DRF Review

1. Approves Slate specific to their portfolio

Milestone: deliver to HR for processing

1. Does not approve slate (specific position(s)) and returns to board with written comments to guide the Board’s re-review

Step 3. Appeal Process (as part of the automated system with option to provide rationale for appeal)

Appealer uses process, then the appropriate DRF reviews for merit.

Milestone: if merited, DRF returns position to Workforce Planning Board for re-consideration.

If not merited as determined by DRF, appeal is denied. Only one appeal per position decision.

Note: results of the Board’s proceedings will be incorporated into the RLT’s quarterly meetings as appropriate.

**Phase 4: Data Collection for Annual RLT Review/Planning**

Step 1. Collate monthly data for annual report – basis for RLT review (statistics on what was approved/denied during previous year)

Step Milestone: Annual Position Report

Step 2: Review current year WO and Regional priorities

Step Milestone: Priorities Summary (for presentation to RLT at annual Workforce Planning session)