**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:** Provide a clear process for regionwide evaluation and approval of new position proposals. New positions are defined as any position that is not on a current signed organization chart or which is on the organization chart but has not been filled/funded for two years or more. The Workforce Planning Board validates that proposed positions align with Agency and Regional priorities, can be sustainably funded, and have appropriate position description/grades. Additionally, the Board looks for optimization considerations such as contractors, partners, Enterprise and sharing.

**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).

**Phase 1: RLT Strategic Workforce Prioritization**

Step 1. RLT members meet once per year to discuss Regional workforce and the Region’s priorities for the upcoming year – establish ranking criteria.

Step 2: RLT members annually evaluate Region’s workforce and rank positions/need using established criteria in a web-based system.

Phase Milestone: Ranking of positions 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?

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)

Step 1 Milestone: Recommended slate delivered to DRF

Step 2. DRF Review

1. Approves Slate

Milestone: deliver to HR for processing

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

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

Appealer uses process, then DRF reviews.

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.

**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)