

Assessment



Recruitment and Workforce Planning

BSBHRM513 Manage workforce planning

BSBHRM506 Manage recruitment, selection and induction processes



Module overview

Module Title: Recruitment and Workforce Planning

Module Description:

Before you begin recruiting, you need to undertake workforce planning to determine the staffing needs of the organisation.

Workforce planning requires an understanding of the make-up of the current workforce, investigation into future needs and analysis of the type and size of workforce required to meet them. To be effective, workforce planning needs to be linked to an organisation's objectives.

Before commencing recruitment you need to review:

- The capabilities needed to deliver current and future priorities;
- The roles required to deliver on the business outcomes
- The options for re-assignment of employees with the required capabilities (or who would benefit from development in the role) from across the agency; and
- The internal and external market and likely application volumes.

Recruiting and interviewing staff is then undertaken according to the clearly defined policies and procedures of the organisation.

Module outcome:

This module will enable students to demystify what strategic workforce planning is and to understand and apply its key elements. It will provide students with a framework and methodology that can be adapted to suit the particular context of their organisation. Using an industry-based scenario, this module will enable students to build a solid foundation understanding of the workforce planning process and develop a strategic workforce plan for a contemporary business

By the end of this module you will have the skills and knowledge needed to manage the planning of the workforce and to manage the recruitment, selection and induction of staff.

Scenario

See lesson 2 and the Appendices for this module for a detailed scenario about JKL Industries.

Student activities

When	Lesson	Student activity	Outcome
Week 1	Understanding the basics Foundation knowledge and skills of workforce planning and recruitment selection and induction processes	Answer questions on workforce planning and recruitment Enterprise skills lesson 1&2	Completed written answers submitted in BLMS
Week 2	Determining workforce requirements Determining recruitment and selection processes	Understand the workforce plan Enterprise skills lesson 2& 3	Communication Plan Risk management Plan Written report Presentation. Completed written answers submitted in BLMS
Week 3	Supporting workforce planning objectives Review and analyse current workforce planning, recruitment, selection and Induction policies and procedures	Investigate initiatives for workforce planning objectives and methodologies Enterprise skills lesson 5 & 6	Action plan Report Completed written answers submitted in BLMS
Week 4	Review and analyse current workforce planning, recruitment, selection and Induction policies and procedures Revising recruitment and selection policies, procedures Inducting staff according to Government legislation and regulations	Develop the relevant policies and procedures to support the recruitment and selection of staff Enterprise skills lesson 7 & 8	Revised recruitment and selection policies Presentation Completed written answers submitted in BLMS
Week 5	Monitoring and evaluating workforce trends	Methodologies relating to induction and probation Enterprise skills lesson 9 & 10	Induction Policy written answers Completed written answers submitted in BLMS
Week 6	Review of Recruitment and Workforce planning module	Methodologies relating to workforce trends and management of selection, recruitment and induction	Online Quiz. Enterprise skills certificate of completion

Lesson 1: Understanding the basics

In today's talent-based economy, the workforce itself is arguably the most important tangible asset of many organisations. Boards, CEOs and HR Directors will frequently declare that workforce planning and data-driven decision-making is a top priority for their organisations. Despite this, the workforce is often not carefully planned, measured or optimised and many organisations are not sufficiently aware of the current or future workforce and business risks that will limit execution of business strategy. While it is difficult to understand this apparent gap between intent and execution, it is likely that the lack of consistent objectives regarding the outputs of workforce planning and a lack of consistent process by which organisations conduct workforce planning are primary contributors to the disparity.

The task of implementing workforce planning is often daunting because it can be so difficult to define. While workforce planning presents many challenges, it provides significant value to organisations that invest in it. To be truly effective, workforce planning needs to be recognised as a business-driven process, which is a fundamental component of organisational strategic planning.



Task 1

Instructions

Answer the following questions:

1. What do the **terms** 'workforce planning' and 'workforce supply' mean?
2. How do the following factors affect **workforce planning and workforce supply**? Please give a short explanation for each factor.
 - a. Changes in technology
 - b. Economic conditions
 - c. Market trends
 - d. Globalisation
3. In a few sentences, describe how **skills and labour shortages** affect workforce supply.
4. How can **unemployment rates** affect workforce supply?
5. Provide a brief description of what **recruitment** is.
6. Provide a brief description of what **selection** is.
7. **Provide 2 differences** between recruitment and selection:

Recruitment	Selection
1.	1.
2.	2.

8. Please read through the 8 steps in the employee selection process carefully. Put them in correct order that selection takes place

1.	Preliminary/first Interview	The purpose of preliminary interviews is basically to eliminate unqualified applications based on information supplied in application forms.	
2.	Final Selection	After all the other steps the candidate is selected finally. Initially the candidate is appointed on probation basis on the acceptance of letter of appointment or contract. The candidate is provided with induction and training after this stage.	
3.	Employment Interview	The next step in selection is employment interview. Here interview is a formal and in-depth conversation between applicant's acceptability. It is considered to be an excellent selection device. Interviews can be One-to-One, Panel Interview, or Sequential Interviews. Besides there can be Structured and Unstructured interviews, Behavioural Interviews, Stress Interviews.	
4.	Selection Tests	Jobseekers that pass the preliminary interviews are called for tests. There are various types of tests conducted depending upon the jobs and the company. These tests can be Aptitude Tests, Personality Tests, and Ability Tests and are conducted to judge how well an individual can perform tasks related to the job. Besides this there are some other tests also like Interest Tests (activity preferences), Graphology Test (Handwriting), Medical Tests, Psychometric Tests etc.	
5.	Reference & Background Checks	Reference checks and background checks are conducted to verify the information provided by the candidates. Reference checks can be through formal letters, telephone conversations. However it is merely a formality and selections decisions are seldom affected by it.	
6.	Physical Examination	In some organisations, for certain jobs, after the selection decision is made the candidate is required to undergo a physical fitness test. A job offer is often contingent upon the candidate passing the physical examination.	
7.	Job Offer	The next step in selection process is job offer to those applicants who have crossed all the previous hurdles. It is made by way of letter of appointment.	
8.	Selection/ Decision	After all the other steps the candidate is selected finally. Initially the candidate is appointed on probation basis on the acceptance of letter of appointment or contract. The candidate is provided with induction and training after this stage.	

9. Assessment Centres can play an important role in recruiting staff. Refer to the following link:

https://www.hays.com.au/employer-services/HAYS_028824

In your own words, describe what an Assessment Centre is and when they might be used by an organisation.

10. What is psychometric testing? Describe how it is relevant for testing skills in recruitment programs.
11. Explain the concept of outsourcing?
12. What are the benefits of outsourcing recruitment?
13. What are some disadvantages of outsourcing recruitment?
14. Contracts and legislation:
- i. What is the purpose of employee contracts and how do they connect with Industrial Relations legislation?
 - ii. Outline the legislation, regulations, standards and codes of practice that may affect workforce planning, recruitment, selection and induction processes.
15. Describe why terms and conditions of employment are an important aspect of recruitment.
16. Can you list and briefly describe how an organisation could become:
- a. An inclusive workplace with a diverse workforce
 - b. An employer of choice
17. Organisational climate surveys may include: employee opinion surveys, employee satisfaction surveys and developing systems for checking how staff perceive the organisation and its functions.
- Why should a company conduct organisational surveys as mentioned above? How can you use the data gathered above for your workforce planning process?

18. Read 'Analysis of Trends in the Australian Labour Market' <https://www.employment.gov.au/annual-report-2016/analysis-trends-australian-labour-market> and in your own words summarise your findings.
19. List the external factors that may affect workforce supply.
20. How does this affect how you recruit and fill specific vacancies?
21. Identify five (5) reasons for developing and retaining a skilled workforce.
22. Why is it important for an organisation to develop a diverse workforce and to ensure cross-cultural management? List five (5) reasons.



Lesson 2: Determining workforce requirements

As JKL Industries HR consultant you will need to have a good understanding of the basic concepts in business planning, and staff recruitment, selection and induction.

Carefully read through the Appendices Recruitment and Workforce Planning to understand the **JKL Industries Case Study** and then answer the following questions.

Task 2

Scenario

JKL Industries is an Australian-owned company selling forklifts, small trucks and spare parts to industry, with a rental division leasing forklifts and small trucks.

The company's head office is in Sydney and they have branches in Brisbane, Melbourne, Perth, Adelaide and Canberra.

After 12 years in business focusing on forklifts and small trucks, JKL has been offered the sales rights to a range of competitively-priced high technology small, medium and large trucks from an innovative Chinese supplier. The market for electric, hybrid and autonomous vehicles is about to take off in Australia. This opportunity will provide JKL with an advantage in range over its competitors.



Sales results over the last five years have indicated strong growth in forklift and truck sales, which have averaged 10% per annum. The rental market has been in decline for the past three years due to the reduced cost of these vehicles and some taxation benefits for purchase of these vehicles.

Taking the sales rights opportunity will, however, entail some significant changes, including important changes to company structure and operations. The company will strategically reposition itself to **focus solely on retail sales and service** and exit the rentals market, in which forces such as competition and consumer choice reduce potential profitability.

The changes will impact workforce planning considerably. The company will need to ensure it has the right people with the right skills – particularly sales and technology skills - to achieve organisational objectives. JKL will need to closely monitor staff turnover and recruitment and implement strategies to retain skilled people and ensure critical roles are filled. In accordance with the organisation's values, JKL intends (where possible) to recruit from within the company and to upskill or reskill existing rental employees who wish to remain with the company.

You are an HR consultant and you have been contracted by JKL to review workforce requirements and develop workforce objectives and strategies. To complete this task, you will need to assess factors that may affect workforce supply, such as internal labour resources and the external labour market.

As the JKL Industries HR Consultant you will need to have a good understanding of the basic concepts of business planning and staff recruitment, selection and induction.

Instructions

Read the 'Case Study and Appendices Recruitment and Workforce Planning' in the Additional Resources folder and then answer the following questions:

1. What are the reasons for senior managers leaving JKL Industries?
2. What are the reasons for salesforce and customer service representatives leaving JKL Industries?
3. What are the reasons for line managers leaving JKL Industries?
4. What are the reasons for mechanics leaving JKL Industries?
5. How many Aboriginal or Torres Strait Islanders were employed by JKL Industries in 2017-2018?
6. How many women were employed by JKL Industries in senior manager or branch manager roles in 2017-2018?
7. How many women were employed by JKL Industries in salesforce and customer service roles in 2017-2018?
8. List the six (6) internal factors that affect JKL Industries' workforce supply.
9. List some external factors that may affect workforce supply.
10. Identify one issue and one opportunity that JKL Industries currently faces.

11. The table below identifies the industrial relations legislation that may be relevant to JKL Industries and the recruitment, selection and induction of staff. Using the name of the legislation in the middle column, and following JKL policies and procedures, explain how JKL Industries might comply with the requirements in the right hand column of the table.

Note: The first one has been completed for you as a guide.

Legislative Requirements	Name of Legislation	How might JKL comply?
<p><i>Equal employment opportunity EEO</i></p>	<p><i>Human Rights and Equal Opportunity Commission Act 1986</i></p> <p>https://www.humanrights.gov.au/employers/good-practice-good-business-factsheets/ten-steps-you-can-take-create-fair-and-productive</p> <p><i>Refer to article above on how to create a fair and productive workplace</i></p>	<ul style="list-style-type: none"> • <i>JKL must ensure commitment to the fair treatment of all personnel and customers.</i> • <i>Access and equity so that all staff are judged fairly.</i> • <i>JKL need to create a fair and productive workplace.</i> • <i>A welcoming, supportive environment will be provided leading to positive learning and employment, and individuals having the opportunity to reach their optimum potential. (See JKL policies and procedures in the appendix)</i>
<p><i>Anti-Discrimination</i></p>	<p>Racial Discrimination Act 1975</p> <p>Sex Discrimination Act 1975</p> <p>Disability Discrimination Act 1992</p> <p>Workplace Gender Equality Act 2012 (Cwth)</p> <p>https://www.humanrights.gov.au/employers/good-practice-good-business-factsheets/workplace-discrimination-and-harassment-policy</p> <p><i>Refer to above article on how to address workplace discrimination and harassment</i></p>	

Industrial relations	Workplace Relations Act 1996	
Workplace relations regulations	Fair Work Australia legislation 2009	
Insurances	Insurance Act 1973 (Cth).	
Taxation	Australian Taxation Office	.
WHS	Work Health and Safety Act 2011	
Privacy & confidentiality	Privacy Act 1988 and Freedom of Information Act 1982	

12. Identify three (3) strategies that could be used to source JKL Industries skilled labour requirements.

13. As the external HR consultant you have been asked by management and stakeholders to review the changes at JKL Industries and write a report about how the changes will impact workforce planning and staff recruitment. You will present this report to management.

The report needs to include all of the information listed below (a – o).

- a. A brief description of the organisation.
- b. Describe the products and services that JKL has provided in the past.
- c. Mission statement.

- d. Vision statement.
- e. JKL Industries company values.
- f. JKL Industries risk management strategies and guiding principles.
- g. Goals and objectives.
- h. Future strategic goals.
- i. Future operational plans and goals.
- j. Organisational structure at JKL. (Refer to theJKL Organisational Chart).
- k. The number of personnel, branches and interstate offices that JKL Industries has.
- l. Jobs that will be affected by the change and how will they be affected.
- m. A summary of the workforce data and an explanation as to why staff are leaving the company. (Use the workforce data used earlier in Appendix 1).
- n. List the jobs that are most critical to JKL.
- o. Include three (3) strategies that JKL Industries could use to address the unacceptable staff turnover.

14. Review the JKL Industries 'Case Study Strategic Plan' to identify the goals that directly involve the company's workforce. For each goal, complete the table below by identifying the strategic and operational objectives of the company.

Strategic Objectives	Operational Objectives

15. Future workforce planning objectives, targets and results.

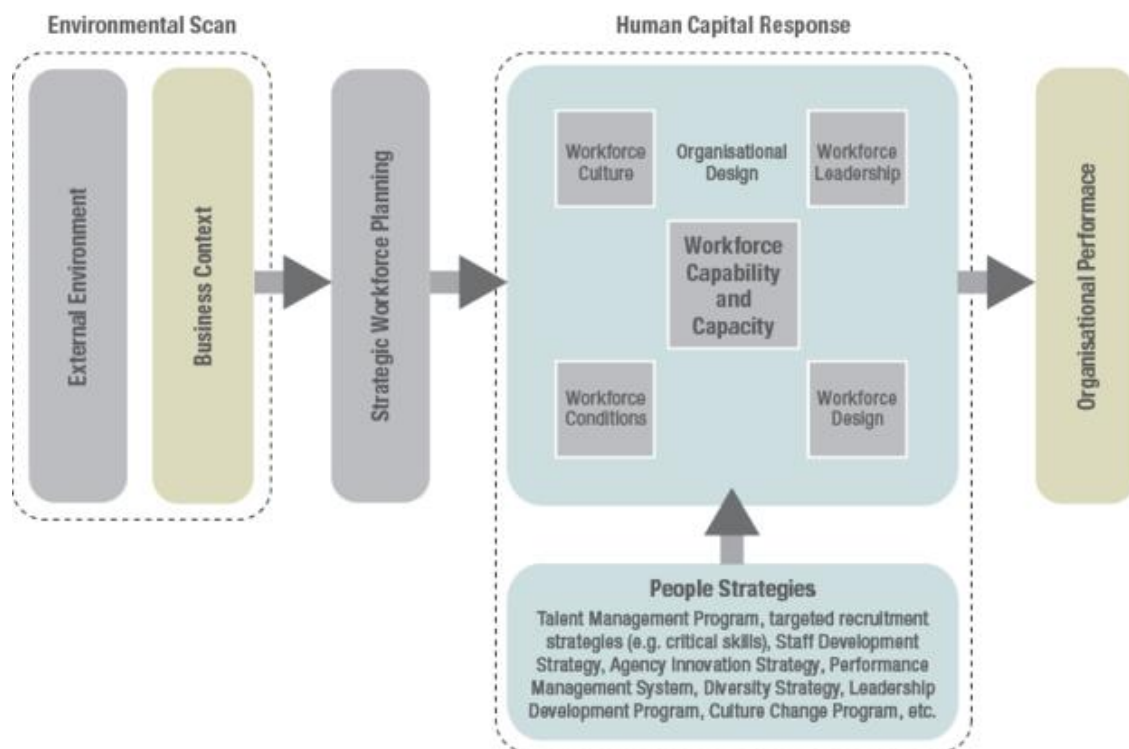
Objective	Target	Result

16. As the external HR Consultant, management has asked you to present to them a progress report and your findings so far. Create a PowerPoint presentation to communicate your research and findings. Include all your research from the above in a brief summary which will accompany your report.



Lesson 3: Supporting workforce planning objectives

Workforce planning is a continual process used to align the needs and priorities of the organization with those of its **workforce** to ensure it can meet its legislative, regulatory, service and production requirements and organizational objectives.



Task 3

Instructions

- As the external HR consultant, you have met with management and partners of JKL Industries. They have instructed you to **continue with your research** and address the best methods and practices for JKL’s workforce planning and recruitment strategies to help achieve future goals and objectives.
- **Continue developing your formal report** from your research in the previous task to present to the management team along with your recommendations.

Communicate the following in your report:

1. What does the company do well at present?
2. What weaknesses need to be addressed?
3. What is the current organisational climate at JKL?
4. How should JKL manage the change process?
5. How should we fill the current vacant positions? (e.g. from internal or external candidates, recruitment agencies etc.)
6. How can JKL Industries ensure they become an employer of choice? Identify three (3) methods.
7. What is the current JKL Industries recruitment and selection policy?

The following questions can be answered using the table below:

8. Who are JKL Industries’ stakeholders?
9. How are the stakeholders involved in the workforce planning and recruitment activity?
10. Look at JKL Industries risk management framework? What are the risks of **not** engaging each stakeholder?
11. What level of engagement is appropriate? (e.g. awareness, involvement, approval, commitment)

Stakeholders	
Who are JKL’s potential stakeholders?	

<p>Involvement</p> <p>How are they involved or interested in workforce planning activity?</p>	
<p>Risk</p> <p>What are the risks of not engaging each stakeholder?</p>	
<p>Engagement/Approach</p> <p>What level of engagement (e.g. awareness, involvement, approval, commitment) is appropriate for each stakeholder?</p> <p>(For example - senior management will need to be involved, commit to the change process and give approval)</p>	
<p>Responsibility</p> <p>Who is responsible for engaging them?</p>	
<p>Timing</p> <p>How often should you engage them?</p>	(Be specific as this will help develop a process)

12. How can JKL Industries ensure that desirable workers are developed and retained?
Complete the table below by identifying three (3) methods that could be utilised in succession planning.

Note: An example has been completed for you.

Strategy	To whom will it apply?
<i>JKL Industries will create a grading system that allows staff to move upwards whilst remaining in the role. Higher grades will be eligible for a higher salary/longer annual leave.</i>	<p><i>Mechanics:</i></p> <ul style="list-style-type: none"> • <i>Create grade levels- according to skills and knowledge acquired</i> • <i>Create responsibilities according to grade and pay level</i> • <i>Working conditions according to grades</i>

13. Plan and evaluate the future staffing requirements based on workforce data provided in Appendix 1.

Role	Sydney	Melbourne	Brisbane	Perth	Adelaide	Canberra
Senior Manager	Current: 4 Required: 4 Exiting: 1	-	-	-	-	-
Branch Manager	Current: 1 Required: 1 Exiting: 0	Current: 1 Required: 1 Exiting: 0	Current: 1 Required: 1 Exiting: 1	Current: 1 Required: 1 Exiting: 0	Current: 1 Required: 1 Exiting: 0	Current: 1 Required: 1 Exiting: 1
Line Manager (service,sales)	Current: 2 Required: 2 Exiting: 1	Current: 2 Required: 2 Exiting: 0	Current: 2 Required: 2 Exiting: 1	Current: 2 Required: 2 Exiting: 1	Current: 2 Required: 2 Exiting: 0	Current: 2 Required: 2 Exiting: 0

Role	Sydney	Melbourne	Brisbane	Perth	Adelaide	Canberra
Salesforce	Current: 10 Required: 15 Exiting: 3	Current: 9 Required: 15 Exiting: 3	Current: 9 Required: 15 Exiting: 2	Current: 9 Required: 13 Exiting: 3	Current: 9 Required: 13 Exiting: 3	Current: 9 Required: 13 Exiting: 3
Rental Customer Service (redundant)	Current: 5 Required: 0 Exiting: 1	Current: 4 Required: 0 Exiting: 1	Current: 4 Required: 0 Exiting: 1	Current: 4 Required: 0 Exiting: 2	Current: 4 Required: 0 Exiting: 1	Current: 4 Required: 0 Exiting: 2
Mechanic	Current: 7 Required: 8 Exiting: 2	Current: 5 Required: 6 Exiting: 2	Current: 5 Required: 6 Exiting: 1	Current: 5 Required: 6 Exiting: 2	Current: 5 Required: 6 Exiting: 1	Current: 5 Required: 6 Exiting: 2
Mechanic's apprentice	0	1	1	1	0	0

14. Develop a risk management and contingency plan -look at the current JKL Risk Management Action Plan – use Appendix 3.

15. Come up with a staffing action plan- use Appendix 4.

16. Present your comprehensive written report to management and stakeholders (your trainer) to gain approval for your workforce planning and strategies for recruitment.

Lesson 4: Review and analyse current workforce planning, recruitment, selection and Induction policies and procedures

A well-prepared and comprehensive induction program helps staff quickly understand the responsibilities of their new role and your expectations of them.

It's important to communicate staffing changes, such as a new staff member starting or an existing one changing roles, to other staff members. Existing staff can support a new staff member throughout the induction process (e.g. by explaining key duties and helping set up their workspace).

Inductions will vary depending on whether the staff member is new or they are an existing staff member switching roles or returning from a long absence.

Task 4

Instructions

You have gained approval from management and stakeholders for future staffing requirements. They would now like you to train the internal HR team as JKL Industries is keen to commence the recruitment drive.

Management has asked you to review and analyse current workforce planning, recruitment, selection and induction policies and procedures for JKL Industries and then create a framework of what needs to be included in revised recruitment, selection and induction policies and procedures.

Complete the following tasks:

1. **Locate the recruitment, selection and induction policy and procedures for the organisation** (attach a copy of the JKL Recruitment, Selection and Induction Policy as Appendix 1 to your report to JKL Management and stakeholders). Some crucial documents to consider are vacant position analysis, position descriptions, advertisements and promotion, shortlisting, interview preparation, interviewing applicants, reference checks, job offer and feedback to unsuccessful applicants.
2. **Update and make changes to the policies if necessary.**

3. **Create version control** for the documents to ensure that employees use the most recent version of the document.
4. **Create either a checklist or workflow diagram** with step-by-step instructions (a procedure) that the JKL recruitment team can follow once you have completed your role as the HR consultant.
 - a. Identify what information (e.g. policy and procedure documents, advertisements, position descriptions, requests to fill a job etc.) are needed.
 - b. What resources do you require to manage the change (personal, financial, technology, re-tooling, space, budget, HRIS, Intranet, document storage system etc.)
 - c. Identify opportunities to utilise specialists (e.g. recruitment agencies, remuneration specialists, vocational psychologists, staff who can run security checks etc.)
 - d. Review and advise on the job advertising approval process.
 - e. Ensure position descriptions and person specifications are used by managers in the recruitment process
 - f. Ensure position descriptions and person specifications are used by managers in selection process, including methods to select and advise job applicants accordingly.
 - g. Ensure position descriptions and person specifications are used by managers in an induction process including guidelines for probationary period.
 - h. Ensure that the selection, recruitment and induction processes comply with relevant legislation and JKL Industries requirements.
 - i. Present your updated selection, recruitment and induction policies and procedures, checklists and workflow diagrams to JKL management and stakeholders to ensure that induction processes are followed across the organisation.

Lesson 5: Monitoring and evaluating workforce trends

Planning for a stable workforce is an ongoing process. As the organisation changes and evolves and government policy also may change, the workforce will need to adapt. Organisations need to constantly monitor their workforce to ensure it continues to meet their needs.

Task 5

Instructions

The management and stakeholders have trialled and implemented your recommendations. It has been 6 months since and they have asked you to gain feedback to measure the success of the program.

You have collected data received from the results of the worker satisfaction survey:

RESULTS FROM ORGANISATIONAL WORKER SATISFACTION SURVEY

Successes:

- 80% employees and 90% managers are satisfied with workforce development and personal career prospects within JKL.
- 80% of employees are less likely than previously to exit; 20% of employees who had previously intended to quit are currently reconsidering.
- 95% of employees feel that they can progress within their roles or that options are available to them to advance.

Potential problems:

- 80% employees are unaware of privacy, discrimination policy and organisational goals with respect to diversity.
- 50% of employees feel the process of advancement; training policies are unclear or under-promoted.
- 50% of mechanics feel they are underpaid with respect to the labour market or not consistently with the award.
- 40% of sales people feel compensation arrangements, rewards and recognition programs are inadequate to keep them at JKL in the long term.

Prepare a short report with your review recommendations which should address the following:

1. Present the survey results to management and address the successes and areas to be addressed
 - a. Successes
 - b. Potential problems
 - c. Prioritise what needs to be addressed immediately
2. Advise Management any changes that they need to address to the workforce plan against patterns in exiting employee and workforce changes to JKL Industries
3. Suggest some ways JKL Industries could monitor labour supply trends for areas of over or under supply and demand in the external environment?
4. Suggest some successful methods that the new In-house HR team could use to survey organisational climate to gauge worker satisfaction on a regular basis.
5. How often should JKL Industries evaluate effectiveness of change processes against agreed objectives and who should be responsible? (be specific in time frames and responsibilities)

Lesson 6: Review and feedback

Task 6

Complete the online quiz in the BLMS

Log on to the Bridge Business College BLMS using any compatible device and complete the online quiz.

Instructions

1. There are 16 multiple choice questions.
2. The BLMS will automatically mark your responses.
3. You need a score of 50% to pass.

