

Annual Human Resources Checklist & Planning Tool

Purpose:

- This simple tool helps you assess and plan for your human resource needs for the coming year. It allows you identify gaps and key areas of focus to improve your overall people performance.
- Understanding your current position allows you to think more clearly and realistically about what you need and want to accomplish this year. It gives you a big picture overview and supports your business plan which provides the structure, direction and clarity to your day-to-day operations.

***For each key area, rate your organization on a scale of 1 to 5 (1 = strongly disagree, 5 = strongly agree).**

Key Areas

Rating

1. Management:

Our overall management ability and effectiveness	1	2	3	4	5
We have an achievable organizational chart and detailed position descriptions for every position	1	2	3	4	5
We have systems and strategies in place for producing predictable results and fostering innovation	1	2	3	4	5
We have clearly stated goals and established benchmarks for success	1	2	3	4	5
Our managers are effective at mentoring employees and developing productive working relationships	1	2	3	4	5

Total score out of possible 25: _____

2. Workplace Engagement:

Our management culture encourages employees to be fully engaged and highly self-motivated	1	2	3	4	5
Employees are committed to the organization and its mission	1	2	3	4	5
Employees feel trusted and valued	1	2	3	4	5
Employees feel their input and feedback is encouraged and acted upon	1	2	3	4	5
Employees feel their efforts and accomplishments are recognized	1	2	3	4	5

Total score out of possible 25: _____

3. Employee Performance & Development:

Employees have the necessary skills to do their jobs	1	2	3	4	5
Employees have sufficient resources to do their jobs	1	2	3	4	5
We have a current plan to address employee professional development needs	1	2	3	4	5
We focus on continuous improvement in performance, practices and policies	1	2	3	4	5
Employees receive regular feedback on their performance	1	2	3	4	5

Total score out of possible 25: _____

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4. Strategic Workforce & Succession Planning:

We have recruiting and hiring processes in place that ensure we have the right people in the right roles across the organization at any given time **1 2 3 4 5**

We have a clear picture of current and future staffing needs and a plan to fill key roles (recruitment, development) **1 2 3 4 5**

Total score out of possible 10: _____

Total assessment score out of possible 85: _____

Gap areas requiring further assessment and focus:

_____	_____
_____	_____
_____	_____

Planning:

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