**Human Resources Planning Worksheet**

Using this document, we’ll prepare a Human Resources Plan Outline. As we move through the process of budgeting and strategic planning, we may need to update our plan. But this will give us the perfect start! (If you are the sole staff person, this document can also be used as your “Dashboard”, to help keep you on track!

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**Step 1:** Write down your complete mission statement.

[Insert Your Mission Statement]

Example:

Our mission is to end and prevent and homelessness for individuals and families in Bluegrass by providing housing services, coordinating income programs, providing mental health care, and advocating for systemic change

**Step 2:** Create a shorthand for your program areas identified in the mission statement. Our example has four (4) program areas. 3-5 is standard.

[Insert Your Program Areas]

Example:

Our mission is to end and prevent and homelessness for individuals and families in Bluegrass by providing housing services, coordinating income programs, providing mental health care, and advocating for systemic change.

Program Areas: Housing Services, Income Services, Mental Health, Advocacy

**Step 3:** Write down your complete list of Programs, Products and Services. You may have as few as one or quite a few depending on the size and scope of your business or organization.

[Insert Your Program Areas]

Example:

* Coalitions
* Community Education Campaign
* Platform Advocacy
* Emergency Shelter
* Employment Connection
* Mental Health Counseling
* Housing Stability Vouchers
* Social Security Connection
* Addiction Counseling & Services
* Long Term Permanent Housing
* Candidate Forums

**Step 4:** Categorize your programs by program area.  
(Note: Sometimes it might seem like a program, product or service can fit into more than one program area – especially events. Just pick the one that seems *most* appropriate for now.)

[Insert Your Program Areas]

Example:

* Housing Services
  + Emergency Shelter
  + Housing Stability Vouchers
  + Long-Term/Permanent Housing
* Income Services
  + Employment Connection
  + Social Security Connection
* Mental Health
  + Mental Health Counseling
  + Addiction Services
* Advocacy
  + Coalitions
  + Community Education Campaign
  + Platform Advocacy
  + Candidate Forums

**Step 5**: Build a planning grid so you can see your whole organization at once (TIP: You can copy and paste this grid in a new document titled [Name of Your Organization] Human Resources Planning Grid or expand the one below.)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Governance | Operations & Administration | Programs, Products & Services | | | |
| Program Area 1 | Program Area 2 | Program Area 3 | Program Area 4 |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
| Human Resources | | | | | |
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**Step 6:** Place your main programmatic items in the grid. Be sure to include Governance and Operations & Administration. You’ll want to make sure you have a sense of your fundraising, marketing, and general administrative needs during this process as well. If you’re a single person staff, you can stop here when complete. This can be used as your Dashboard which can be a helpful tool in staying organized and on track!

Example:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Governance | Operations & Administration | Programs, Products & Services | | | |
| Housing Services | Income Services | Mental Health | Advocacy |
| Board Meetings | General Administration | Emergency Shelter | Employment Connection | Mental Health Counseling | Platform Advocacy |
| Officer Elections | Human Resources | Housing Stability Vouchers | Social Security Connection | Addictions Counseling | Coalitions |
|  | Finance, Budget & Accounting | Long Term Permanent Housing |  |  | Candidate Forums |
|  | Fundraising, Revenue & Development |  |  |  | Community Education Campaign |
|  | Marketing & Outreach |  |  |  |  |
|  | Media & Press |  |  |  |  |
| Human Resources | | | | | |
|  |  |  |  |  |  |

**Step 7**: Now that you can see all of the programmatic features of your organization, it’s time to think about what roles and skills are needed in the broadest sense. Consider what tasks can be completed by a single person, and combine the roles when it makes sense. For nonprofits, remember to use Committees and volunteer positions where appropriate. Once complete, you’ll have your basic Human Resource Plan Outline. This can be used to develop your budget, as well as many other tools. (We’ve reduced the fonts in this example to place it all on one page.)

Example:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Governance | Operations & Administration | Programs & Services | | | |
| Housing Services | Income Services | Mental Health | Advocacy |
| Board Meetings  Officer Elections | General Administration  Human Resources  Finance, Budget & Accounting  Fundraising, Revenue & Development  Marketing & Outreach  Media & Press | Emergency Shelter  Housing Stability Vouchers  Long Term Permanent Housing | Employment Connection  Social Security Connection | Mental Health Counseling  Addictions Counseling | Platform Advocacy  Coalitions  Candidate Forums  Community Education Campaign |
| Human Resources | | | | | |
| Board Members  Board Officers | CEO/Executive Director  Office Manager (FT)  Office Management Volunteers  Fundraising Manager (FT) | Housing Services Manager  Shelter Manager  Shelter Volunteers  Shelter Intake  Specialist  Landlord Coordinator  Voucher Intake and Payment Specialist  Long Term Housing Manager  Leasing Agent  Maintenance Team x 3 | Income Services Manager  Employer Coordinator  Employee Services Provider  Social Security Advisor | Mental Health Services Manager  Intake Coordinator  Counselors x 3 | Advocacy Director (FT)  Platform Committee (Volunteers) |

**Step 8:** Create a role flow chart. A flow chart allows readers to easily visualize your organization’s team, as well as decision-making processes from a broad level. (Note: The traditional “hierarchy flow chart” tends to be “top down”. We prefer a side-by-side role-based representation to institutionalize recognition of people having equal standing in the organization, regardless of position.) You can use the one below to make your own (just delete and add where needed) or start from scratch.

**Step 9:** Develop a short summary of your human resources plan.

[Insert Here]

Example:

The organization is governed by a Board of Directors and led by a full time Executive Director. Each program area is a led by a Manager or Director, who provides support to the direct services team.

**Step 10:** Complete and save! This document can be now used for Human Resources Planning for your organization for a long time. It will also be used to complete your Operations Manual.