**Annexure 3 – Templates on Manpower Planning (HR 004A – HR 004J)**

**HR 004A – Divisional Objectives and Functions**

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| Division: | | Date: |
| Divisional Objective: |  | |
| Key Performance Areas: | Core functions | Support functions |
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**HR 004B – Present Staff Need and HR Demand**

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| Division: | | | | | Date: | | | |
| Designation/ Position: | Required Competencies | | Available  Competencies | | Utilized  Competencies | | Competency gap | |
| Technical | Non-Technical | Technical | Non-Technical | Technical | Non-Technical | Technical | Non-Technical |
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*Note: The required competencies shall indicate the position profiles. Technical competencies shall include the qualifications, experience and skills whilst Non-Technical shall include the required soft skills and behaviours for the relevant position.*

**HR 004C – Standardization of Divisional HR Demand - Quantitative Approach (Trend Analysis)**

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| --- | --- | --- | --- | --- | --- |
| Division: | | | | | |
| Position | Year (last 5 years) | Number of Employees | Annual Work Program Budget | Earned Income Ratio | Personal Cost Ratio |
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***Note:*** *The number of employees for the target year is calculated through considering earned income ratio, personal cost ratio and the forecasted work program budget figure.*

**HR 004D – Standardization of Divisional HR Demand:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Division: | | Date: | | |
| Position: | Present No of Staff | Required No of Staff | Deviations | Qualitative and quantitative factors (reasons) |
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**HR 004E** – **Manpower Requisition Form (MRF)**

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| --- | --- |
| **Requestor Name** | **Division** |
| **Designation** | **Date** |

|  |  |
| --- | --- |
| **Areas to be Considered** |  |
| Are the division goals in line with those of the organization? *Yes/ No - Comments* |  |
| Are there any divisional expansion or retrenchment plans? *Yes/ No - Comments* |  |
| Position/s to be filled and the number |  |
| Date required |  |
| Is recruitment the most appropriate solution | Additional position /New position Replacement /Existing |
| Replacement is due to (Pl tick) | Resignation Termination  Promotion Transfer |
| Vacancy to be filled from (Pl tick) | Within Outside |
| Type of employment (Pl tick) | Fulltime/ Part time Temporary  Contract Any other |
| If **an existing position** becomes vacant the following need to be considered:     * Is the position needed in its current form? * The effect of non-replacement on service delivery * Possibility of work reallocation amongst existing staff members or elimination * Possibility of improving the position * Possibility of the position to be sustained by the current budget |  |
| When a **new position** is proposed the following need to be considered;   * + Purpose of the new position   + Congruence with the strategic direction   + Net annual HR cost of profile to the bank |  |
| **Qualifications Required** |  |
| Academic qualification |  |
| Professional qualifications |  |
| Experience |  |
| Skills and behaviours |  |
| Roles and Responsibilities |  |
| Reporting line |  |
| **Other Information**  Salary range |  |
| Work location |  |
| Age range and gender |  |
| **Authorization** |  |
| HR division evaluation comments: |  |
| Date of submission to the Committee by HR: |  |
| Committee approval –  comments (approved / not approved)  Signature of committee member: |  |
| Date | |

**HR 004F** – **Promotion Case Analysis** **Form**

|  |  |
| --- | --- |
| **Divisional Information** |  |
| Division |  |
| Proposed Job Title/s |  |
| Proposed job code and grade |  |
| Number of candidates considered for the promotion |  |
| Number of candidate/s to be promoted |  |
| Is there a system that enables all employees to learn about promotion opportunities on an equal basis |  |
| **Candidate information** |  |
| Academic and professional qualifications  Please annex a copy of the CV of the candidate being proposed for promotion |  |
| Years of relevant experience |  |
| Key strengths of the candidateand what is expected of her/him to achieve in the new position. |  |
| Description of his/her experience and achievements in the present position in the past 2 years |  |
| New/ additional responsibilities in the new position |  |
| Expected performance achievement in the new position |  |
| Necessity of any training |  |
| Describe the candidate’s relationship with peers, superiors and subordinates. |  |
| Leadership skills |  |
| Performance evaluation rating for the past year and actions that merit consideration in assessing this promotion; e.g. Involvement in any business development / other related initiatives/technical initiatives and contribution towards maintaining quality of work in the last 12 months. |  |
| Specific reasons for proposing the promotion for this candidate |  |
| Competencies that differentiates the candidate as having potential to add value at the next level rather than being in the present position |  |
| Cross functional ability |  |
| The net increase in the income to the division as a result of the promotion |  |
| The net increase in the cost to the division as a result of the promotion |  |
| Salaries for similar roles in the competitive firms. |  |

**HR 004G – HRIS Guidelines**

|  |  |
| --- | --- |
| **Information** | **Comments** |
| **Personal data**  **-** Age  - Qualifications  - Overall experience  - Special skills  - Training record |  |
| **Position data**  - Current job  - Work history in the organization |  |
| **Financial data**  - Current pay  - Composition of pay  - Incremental scale  - Pension rights |  |
| **Head count analysis by**   * Age * Gender * Area of travel (home address) * Service in the organization * Skills * Grades * Division. |  |

**HR 004H – General Guidelines**

**HR 004H (I) -Check list Forecasting the Demand:**

|  |  |  |
| --- | --- | --- |
| **Areas to be considered** | **Yes/ No** | **Comments** |
| **Organizational decisions** |  |  |
| - Company’s future plans |  |  |
| - Estimated company’s business activity |  |  |
| - Divisional expansion plans |  |  |
| **External environmental challenges**  The state of economy, political, legal, social technological changes and market forces and trends. |  |  |
| **Work force factors**  Retirements, terminations, resignations, deaths, wastages (employee turnover, absenteeism and sickness), demographics etc. |  |  |

**HR 004H (II) - Checklist for Forecasting the Supply of Labour:**

|  |  |  |
| --- | --- | --- |
| **Internal** | **Yes/ No** | **Comments** |
| Manpower inventories |  |  |
| Turnover Analysis- % of employees who remain in job from one year to the next 5 years |  |  |
| Replacement chart |  |  |
| Succession planning |  |  |
| **External** |  |  |
| * Demographic changes * Education of workforce * Labor mobility * Government policies * Unemployment |  |  |

**HR 004H (III) - Bridging the Gap**

|  |  |  |
| --- | --- | --- |
| **Areas to be considered** | **Yes/ No** | **Comments** |
| Recruitment |  |  |
| Alternative to recruitment   * Reorganizing the work distribution, cross functional work, multitasking. * Training & Development initiatives * Increasing the existing employee’s responsibilities * Redesigning or automating job tasks * Employ contract staff |  |  |
| Redundancy |  |  |
| Succession planning |  |  |
| Productivity plan |  |  |
| Redeployment plan |  |  |

**HR 004J -The HR Cost Analysis**

**MP 004J (I) - The Divisional or Program Staff Categories, Numbers and Monthly Basic Salary Rates**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Division | Designation | Number | Basic Salary Cost | \* Total salary cost |
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\* Note: Total salary cost is calculated through Basic Salary cost + Cost of Other fringe benefits as per HR 004J (II)

**HR 004J (II) - Monthly Cost Incurred per each Category of Staff in Terms of Benefits**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Job Designation | Total Divisional or Program Benefits Cost | | | | |
| Program Incentives/ Medical Benefits | Transport Allowance/  Vehicle Allowance/ Fuel Cost | Any Other Allowances | Statutory Contributions (EPF/ ETF) | Total |
| Division/ Program | | | | | |
| Designations |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Total Divisional Benefit Cost | | | | |  |

**HR 004J (III) – Overall Breakdown of the Monthly Total Remuneration and the Variable Cost for Divisions**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Division | Total Basic Salary cost (Rs) | Total Benefits Cost (Rs) | \* Variable Costs (Rs) | Total HR Costs per Division/ Program (Rs) |
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*\* Note: Variable Costs calculations are to be made through HR 004J (IV) format*

**HR 004J (IV) – Analysis of Monthly Variable Costs**

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Number | Accounts Folio No. | Expense Type | Amount (Rs) |
|  |  | **Office Expenses** |  |
|  |  | Office space – rent |  |
|  |  | Electricity |  |
|  |  | Office Stationery |  |
|  |  | Telephone |  |
|  |  | Water |  |
|  |  | **Total per annum** |  |
|  |  | Total per month |  |
|  |  | No. of Staff |  |
|  |  | **Monthly cost per staff member** |  |