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

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

|  |  |
| --- | --- |
| Division:  | Date:  |
| Divisional Objective: |  |
| Key Performance Areas: | Core functions | Support functions |
|  |  |  |
|  |  |
|  |  |
|  |  |  |
|  |  |
|  |  |

**HR 004B – Present Staff Need and HR Demand**

|  |  |
| --- | --- |
| Division: | Date: |
| Designation/ Position: | Required Competencies | AvailableCompetencies | UtilizedCompetencies | Competency gap |
| Technical | Non-Technical | Technical | Non-Technical | Technical | Non-Technical | Technical | Non-Technical |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

*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)**

|  |
| --- |
| Division:  |
| Position | Year (last 5 years) | Number of Employees  | Annual Work Program Budget | Earned Income Ratio  | Personal Cost Ratio  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***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) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**HR 004E** – **Manpower Requisition Form (MRF)**

|  |  |
| --- | --- |
| **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 TerminationPromotion Transfer |
| Vacancy to be filled from (Pl tick)  | Within Outside |
| Type of employment (Pl tick) | Fulltime/ Part time TemporaryContract 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 qualificationsPlease 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  |
|  |  |  |  |  |
|  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |

\* 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) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

*\* 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** |  |