

Aligning Needs: Staffing Effort Analysis Tool

What is the purpose of this tool?

For managers to plan for the day-to-day and special project staffing needs of the organization, they must estimate the staffing needed to support anticipated activities. This tool will assist a manager to identify staffing needs by outlining required roles, responsibilities, and activities. This tool is designed to document staffing needs and inform cost estimates.

How does the tool work?

Using the roles and responsibilities found in existing job descriptions, the manager enters the roles, responsibilities, and activities needed to conduct the day-to-day operations of the organization, including special projects, data analysis, and reporting under each category. For each activity, the user identifies current staffing (i.e., who is responsible), gaps (i.e., what is needed), and anticipated human resource (existing staff, volunteer or hire) to conduct the activities.

What is included in each tab?

The Staffing Effort Analysis Tool has three tabs: Instructions, Staffing Effort Worksheet Sample, and Staffing Effort

- 1) The Instructions tab provides guidance on how to utilize the the organization Staffing Effort Analysis Tool.
- 2) The Staffing Effort Worksheet Sample tab shows an example of a Staffing Effort Worksheet to be used as a
- 3) The Staffing Effort Worksheet tab is blank for community use.

How do I use these tabs?

The Instructions Tab

Read through all the instructions and explanations before attempting to complete the Staffing Effort Worksheet tab.

The Staffing Effort Worksheet Sample Tab

Review the Staffing Effort Worksheet Sample tab to understand the potential ways to answer the questions posed in

The Staffing Effort Worksheet Tab

- > Step 1. Roles & Responsibilities: If needed, expand roles and responsibilities with additional requirements or responsibility.
- > Step 3. Gap: Potential Solution: Identify, if a role or responsibility is not covered by an existing staff resource, a potential staff person or volunteer, or new position.
- > Step 4. Estimated Workload: Identify the percentage of time of a full time staff person that would likely be required to complete the role or responsibility. To fully understand the staff capacity needed, determine percentages based on actual effort needed to complete the role/responsibility. (100% is full-time, 50% is half-time,
- > Step 5. Existing Staff: For each role or responsibility, indicate if the staff resource will be from inside the
- > Step 6. Volunteer or Hire: For each role or responsibility, indicate if the staff resource will need to be filled by an outside volunteer or to be hired (if there is a budget). (mark with X)

What do I do with this information?

Developing a Budget

- > Once the estimated staffing level of effort is calculated, this data, in combination with estimated salary rate or volunteer stipend information, can be entered into a budget planning document.

identified as "Gaps."

Staffing needs for which I cannot identify a potential resource?

- > Share this information! Present stakeholders with information on planned activities that will require the support or growth of the organization, including potential budget gaps. Your organization's stakeholders may be able to provide volunteer assistance and/or financial support to fill those gaps.

*Adapted from the "Homeless Management Information Systems Budgeting and Staffing Toolkit", March 2011 by Office of Community Planning and Development, US DHUD

Staffing Effort Worksheet

Roles and Responsibilities	Existing: Who Does It?	Gap: Potential Solution	Estimated Workload (%)	Existing Staff	Volunteer	Hire
Leadership/Management						
Provides leadership and guidance for day-to-day operations	Director			X		
Conducts planning, budgeting activities		Director	20%	X		
Develops and maintains policy and procedures	Director			X		
Hiring, supervising, evaluating, rewarding and disciplining, terminating staff	Director			X		
Provides ongoing outreach to the community	Director			X		
Project Coordination						
Day-to-day coordination of project activities and project staff	Staff			X		
Monitors project progress and keeps records for project evaluation/feedback	Director			X		
Recruit and manage volunteers to support project activities	Director			X		
Support in representing organization at events and meetings	Staff			X		
Financial Management/Accounting						
Monitor budget	Director			X		
Records payments and expenses		New Position: Accountant	50%			X
Maintains petty cash	Director			X		
Prepare reports to management, Board, donors, tax and governing agencies	Director			X		
Administrative Assistance						
Schedule meetings and events and support with logistics (including F&B)	Volunteer				X	
Prepare agendas for meetings		Director		X		
Prepare and duplicate materials for meetings	Staff			X		
Prepare meeting minutes	Staff			X		
Update beneficiary information/database and assure their accuracy		Volunteer			X	
Assist Center Manager or staff with reports or presentations and translations		Volunteer			X	
Answer telephone and greet visitors	Staff			X		
Human Resources/Office Administration						
Provide support in HR functions (including staff leave, benefits, etc.) and in managing HR files	Director			X		
Provide orientation on office systems to new employees	Staff			X		
Maintains running of office by organizing office operations and procedures; assigning and monitoring administrative functions; procuring office equipment and services	Staff			X		
Order and maintain supply inventory	Staff			X		
Manage vendor contact information	Staff			X		
Fundraising/Marketing/Reporting						
Network with prospective donors at events and follow-up		Director		X		
Prepare and update marketing materials, newsletters, presentations		Staff		X		
Update website, social media sites, with relevant news, events and info		Volunteer			X	
Liaise with donors and donor prospects	Director			X		
Develop and manage donor contact database		Volunteer			X	
Develop funding proposals	Director			X		
Prepare reports to donors	Director			X		

Staffing Effort Worksheet

	Existing: Who Does It?	Gap: Potential Solution	Estimated Workload (%)			
Roles and Responsibilities						
Leadership/Management				Existing Sta	Volunteer	Hire
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Develops and maintains policy and procedures						
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Provides ongoing outreach to the community						
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Support in representing organization at events and meetings						
Financial Management/Accounting	Who does it?	Potential Solution	Estimated Workload (%)	xisting Sta	Volunteer	Hire
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Prepare reports to management, Board, donors, tax and governing agencies						
Administrative Assistance	Who does it?	Potential Solution	Estimated Workload (%)	xisting Sta	Volunteer	Hire
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Prepare agendas for meetings						
Prepare and duplicate materials for meetings						
Prepare meeting minutes						
Update beneficiary information/database and assure their accuracy						
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Manage vendor contact information						
Fundraising/Marketing/Reporting	Who does it?	Potential Solution	Estimated Workload (%)	xisting Sta	Volunteer	Hire
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Update website, social media sites, with relevant news, events and info						
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Develop funding proposals						
Prepare reports to donors						