



## Drafting a Staffing Plan for Your Organization

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Your organization may never have all the money or time it needs to fully realize its mission, but that does not stop you from trying. Likewise, the fact that you do not have all the resources that you need in hand should not stop you from having a staffing plan in place.

- **What is a staffing plan?**

A staffing plan is a “map” that outlines the staffing requirements of your organization. Who do you need on staff and what types of tasks would be getting done? A staffing plan is not necessarily what your organization looks like right now, but what it *could* look like if all the critical functions were being attended to.

- **What are the advantages of having a staffing plan?**

Opportunities often arise unexpectedly; in order to be able to act on an opportunity quickly, it is useful to have a plan in place. A second important reason to enable the organization to make good staffing decisions, for example, hiring on emotion rather than on the needs of the organization. Often smaller organizations are tempted to promote someone from within the organization without considering the needs of the position or the consequences if that decision does not work out successfully. While this strategy is understandable, it is often not in the best interest of the organization or the individual.

- **What happens when we can't afford all these positions?**

First, keep in mind that not all the positions will require a full time commitment. It may be possible to bundle key functions together so that a single position is covering 2-3 key functions. Also, it is possible that some key functions can be handled by a volunteer or a committee of the board. Ideally, your staffing plan would cover your organization for 2-3 years. When an opportunity to add staff arises, you can act quickly and with confidence.

- **Who should draft this staffing plan?**

The broader the participation in this process, the better the final result. Minimally, input should be collected from current staff, board members, and key stakeholders. With that input, a small team should be able to pull together a draft plan in a short time.

- **How do we get started drafting our staffing plan?**

As with most activities of your organization, you begin with the mission. What business are you in? Who do you serve? Knowing who your customer is can help you identify what types of staff you need on board. You will also need to consider the key functions that keep your organization afloat. If communicating with your clients/members is a critical activity, then you need someone



who is in charge of communications. If you need to raise money to operate, then you may need a fundraiser. If your organization relies on volunteers, then a volunteer manager should be part of your staff.

Developing your staffing plan is not an exact science and there is no 'right' or 'wrong' way to approach it. Like most planning, it is never fully finalized and you should revisit your staffing plan on a regular basis. Circumstances will change over time and those changes may impact your staffing needs.



The table on the following page is for you to begin identifying your staffing needs and how they are currently being met.

- **Function** should include any task category that is necessary to your organization's operations.
- **Hours/week** should include an approximate range of the hours that task requires. You may wish to include a range for some tasks. If a task is specific to a certain time of the year, then make a note of the number of hours over what period of time.
- **Primary person** refers to who most often is responsible for this task.
- **Importance of task** details whether the task is critical to meeting the mission
  - (C)-these are the tasks which the organization exists to do;
  - (OS)-Organization Support includes tasks that must be done in order for the organization to function (accounting, grant writing, fund-raising, etc.);
  - (I)-Important includes other types of tasks not covered in the other categories.

If there are tasks that do not belong in any of these categories, just leave them blank for now, you can revisit them in later drafts. Estimated cost is the actual cost to the organization of having that activity done. This includes salary/benefits but may also include office equipment, internet access, telephone expenses, etc.



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<b>Function:</b> [Ex. Marketing; Office Management; Fundraising; Outreach; communications; etc.]	<b>Hours/Week*</b> [Low-High] *note seasonal or infrequent tasks where applicable	<b>Primary Person:</b> Who is the person responsible for this function now? [B=Board Member; V=volunteer; C=Paid Consultant; S=Staff; N=No one]	<b>Relative Importance :</b> Of task to organization: C=Critical to mission; I=Important; OS=Organizational Support	<b>Estimated Cost:</b> (\$/year) for this function. [Note: this should include salary/wage benefits (if any), office space, operating money, etc.]	<b>Notes:</b>



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<b>Related Functions:</b> Combine functions that would require a similar skill set from the previous table	<b>Total hours/week:</b>	<b>Who would supervise this position?</b>	<b>Added cost to the organization?</b>	<b>Advantages to the organization:</b>	<b>Priority:</b> Rank these positions as high-medium-low. [Reference these priorities when budgets and strategic plans are being developed].
<b>Job 1-</b>					



## The Next Step:

Working from the chart on the previous page, you can now begin to identify where certain functions might be combined with other functions to create a position, by using the chart on the previous page. Do this carefully however, since there are skill sets and functions that do not usually combine easily. For example, a web designer usually has a specific set of skills that might not combine well with say, bookkeeping. On the other hand, a communications person might make a great volunteer coordinator.

You should also be able to identify where you need staff vs. where you might be able to use independent contractors. The Internal Revenue Service (IRS) has some strict guidelines in this matter so we suggest that you first review *Publication 15-A Employer's Supplemental Tax Guide* at: <http://www.irs.gov/pub/irs-pdf/p15a.pdf> for more information before making final decisions. As a general rule of thumb, if hours are less than 10/week and the skills required are not a direct fit with the mission and/or require specialized training, then contracting for those services is probably a good choice (provided you have reviewed the IRS guidelines and there is no reason to believe that work should be considered employment).

## Related Resources:

The following resources are related to hiring, training and evaluating your organization's employees. These resources and more are located at the UVM Extension Building Capacity website: <http://www.uvm.edu/extension/community/buildingcapacity/>

- ***Now I Get It! More from Staff Training:***  
[http://www.uvm.edu/extension/community/buildingcapacity/?Page=webinars\\_staff.html#web1](http://www.uvm.edu/extension/community/buildingcapacity/?Page=webinars_staff.html#web1)
- ***Writing a Position Description:***  
<http://www.uvm.edu/extension/community/buildingcapacity/?Page=tools.html>
- ***Combining Inspiring Leadership With Effective Management:***  
<http://www.uvm.edu/extension/community/buildingcapacity/?Page=tools.html>
- ***Laying the Foundation Through Mission and Vision:***  
<http://www.uvm.edu/extension/community/buildingcapacity/?Page=tools.html>
- ***Hiring, Managing & Terminating Employees and Volunteers: Basic Legal Issues***  
[http://www.uvm.edu/extension/community/buildingcapacity/?Page=webinars\\_staff.html#web2](http://www.uvm.edu/extension/community/buildingcapacity/?Page=webinars_staff.html#web2)

