



DEPARTMENT OF THE NAVY  
HEADQUARTERS UNITED STATES MARINE CORPS  
3000 MARINE CORPS PENTAGON  
WASHINGTON, DC 20350-3000

MCO 12250.2  
MPC  
4 FEB 2014

MARINE CORPS ORDER 12250.2

From: Commandant of the Marine Corps  
To: Distribution List

Subj: CIVILIAN COMMAND-LEVEL STRATEGIC WORKFORCE PLANNING  
PROCEDURES

Ref: (a) Title 10, U.S. Code  
(b) Public Law 109-163  
(c) Public Law 111-84  
(d) DoDI 1100.22, "Policy and Procedures for Determining  
Workforce Mix," April 12, 2010  
(e) DoDI 1400.25, Vol 250, "DoD Civilian Personnel  
Management System: Civilian Strategic Human Capital  
Planning (SHCP)," November 18, 2008  
(f) SECNAVINST 12250.6A  
(g) MCO 5311.1D  
(h) MCO 7300.21A  
(i) MCO 12510.2C W/CH 1  
(j) MARADMIN 229/13  
(k) MARADMIN 315/12  
(l) MARADMIN 393/13  
(m) SECNAV M-5210.1  
(n) SECNAV M-5214.1

Encl: (1) Marine Corps Command-Level Strategic Workforce  
Planning (CLSWP) Procedures

Report Required: Strategic Workforce Planning Toolbox  
Extract (Report Control Symbol EXEMPT)  
chap. 4, par. 1a

1. Situation. To establish United States Marine Corps (USMC) policy and assign responsibility for conducting Command-Level Strategic Workforce Planning (CLSWP) in accordance with the references.

2. Mission. To execute strategic workforce planning principles and procedures necessary for effective workforce management in support of command-level missions throughout the Marine Corps.

DISTRIBUTION STATEMENT A: Approved for public distribution;  
distribution is unlimited.

3. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. Commanders, Commanding Officers, and Headquarters Marine Corps (HQMC) Staff Agency heads shall implement this Order including the requirements of the references and enclosure (1).

(2) Concept of Operations

(a) This Order shall be used in conjunction with the requirements of Command-Level Strategic Total Force Management Planning (STFMP) as outlined in reference (1).

(b) Conduct initial position-by-position review of current and future workforce needs to establish a multi-year plan and annually review and update in accordance with this Order.

(c) Develop, disseminate, and monitor workforce action plans that strategically engage Human Resources Offices, Comptrollers, and Manpower Directors in their scheduled execution.

b. Subordinate Elements Missions

(1) Deputy Commandant Manpower & Reserve Affairs (DC M&RA). The DC M&RA, Manpower Plans and Policy Division (MP), Civilian Workforce Management Branch (MPC) is the lead for developing policy and procedures associated with this Order.

(2) Civilian Personnel Policy (MPC-10). MPC-10 is the primary advisor on manage-to-payroll and workforce shaping policies related to CLSWP.

(3) Civilian Workforce Planning and Development (MPC-30). MPC-30 shall act as the primary CLSWP Integration Office and will ensuring Marine Corps organizations and key stakeholders are trained and supported on the procedural guidance, tools and templates designed for implementation.

(4) Major Subordinate Commands (MSC). MSCs shall establish guidance ensuring consistent execution of CLSWP throughout their organizations.

(5) Commands and HQMC Staff Agencies. Commanders, Commanding Officers and heads of HQMC Staff Agencies shall provide workforce strategic guidance to be used by planning teams. Guidance should incorporate aspects of strategic initiatives communicated from USMC Community of Interest Leaders, programmed budget elements across the Future Year Defense Plan (FYDP), legislative policy changes, organizational priorities and mission needs.

#### 4. Administration and Logistics

a. Recommendations concerning the contents of this Order may be forwarded to CMC (MPC) via the appropriate chain-of-command.

b. Commanders, Commanding Officers and HQMC Staff Agency heads shall:

(1) Establish local implementing guidance for conducting CLSWP based on guidance provided in enclosure (1). Such guidance and policy must be consistent with this Order and may adopt more detailed rules to meet specific needs.

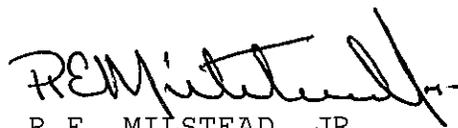
(2) Ensure adequate staff is assigned by charter to conduct comprehensive CLSWP in order to meet the requirements of this Order and reference (1).

c. Records created as a result of this Order shall be managed according to National Archives and Records Administration approved dispositions per reference (m) to ensure proper maintenance, use, accessibility and preservation, regardless of format or medium.

#### 5. Command and Signal

a. Command. This Order is applicable to commands and HQMC staff agencies employing appropriated and non-appropriated funded civilian employees in all categories and pay systems.

b. Signal. This Order is effective the date signed.



R.E. MILSTEAD, JR.  
Deputy Commandant for  
Manpower and Reserve Affairs

Distribution: PCN 10211970200

LOCATOR SHEET

Subj: Marine Corps Command-Level Strategic Workforce Planning  
(CLSWP) Procedures

Location: \_\_\_\_\_  
(Indicate the location(s) of the copy(ies) of this  
Order).



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## Chapter 1

### Responsibilities

1. Deputy Commandant Manpower & Reserve Affairs (DC, M&RA).  
The DC M&RA shall establish policy and provide guidance regarding Command-Level Strategic Workforce Planning (CLSWP).
2. Assistant Deputy Commandant Manpower & Reserve Affairs (ADC, M&RA)
  - a. Monitor compliance with this Order.
  - b. Provide additional guidance and support as needed.
  - c. Provide the goals and objectives associated with the USMC Civilian Workforce Strategic Plan.
3. Commanders, Commanding Officers and HQMC Staff Agency Heads
  - a. Establish a Strategic Workforce Planning Team (SWPT) to implement CLSWP on an annual basis.
    - (1) Appoint a SWPT Leader, in writing, to serve as the principal for planning and monitoring execution of the CLSWP process.
    - (2) At a minimum, SWPTs must include the following representatives:
      - (a) Manpower/G-1 representative.
      - (b) Comptroller/G-8 representative.
      - (c) Human Resources CLSWP Consultant.
      - (d) Human Resources Labor Relations representative (if applicable).
    - (3) Additional members and teams may be established, as necessary, to support the needs of the SWPT (i.e., Equal Opportunity (EO)/Equal Employment Opportunity (EEO) Specialist, Employee Relations Representative).

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b. Provide the SWPT with strategic guidance affecting mission direction/requirements over the next three to five years, setting priorities and establishing operating constraints.

4. USMC Community of Interests (COI) Leaders. COI Leaders shall inform commands annually of strategic guidance affecting aspects of their associated civilian workforce communities. This guidance will be communicated annually through the USMC Human Capital Management Assessment/Report.

5. Civilian Workforce Management Branch (MPC)

a. Analyze and evaluate workforce employment trends; develop hiring targets and track staffing management throughout the Marine Corps enterprise to identify needs for new or changing policies, programs, and strategies; review and coordinate desired enterprise workforce shaping options with external approving agencies (e.g., Congress, Office of Personnel Management (OPM), Department of Defense (DoD), Department of Navy (DON), etc.).

b. Publish an annual report assessing USMC Civilian Human Capital Management programs and policies for strategic use by commands.

c. Conduct analytical studies addressing various characteristics of the Marine Corps civilian workforce and turn findings into actionable information for command use.

d. Provide guidance and tools that support CLSWP.

e. Establish communication networks necessary to ensure success.

f. Establish CLSWP integrator roles within the Civilian Personnel Policy (MPC-10) and Civilian Workforce Planning and Development (MPC-30) sections to advise and support commands and Human Resources Directors/Human Resources Satellite Managers (HRD/HRO) conducting CLSWP efforts.

6. Human Resources Directors/Human Resources Satellite Managers (HRD/HRO). Per reference (b) and (c), HR leaders and staffs shall be consulted and shall participate in all planning and operational activities related to strategic workforce planning. HRD/HROs shall:

a. Identify and provide training for a team of CLSWP consultants.

b. Provide civilian workforce data support and an in-depth Workforce Analysis Report to include historic trends, projected losses and retirements, and the most recent EEO Barrier Analysis results to serviced commands conducting CLSWP.

c. Provide expert classification, EEO, staffing/recruitment, and human capital program consultation necessary during the assessment of current and future civilian workforce requirements.

d. Provide expert advice on available options (i.e., workforce shaping, training and development, recruitment strategies, etc.) necessary to reduce or eliminate gaps identified during the planning process.

7. Strategic Workforce Planning Teams (SWPT)

a. Develop a SWPT Charter for approval by command leadership (refer to Appendix A and B).

b. Conduct CLSWP and report findings and recommendations to leadership (refer to Appendix C).

c. Establish and execute Workforce Action Plans that address gaps discovered during planning assessments and analysis (refer to Appendix D).

8. Key Stakeholders. SWPTs will engage and update the following key stakeholders, as appropriate and necessary.

a. Directors, Supervisors, Managers.

b. Program/Project Leads.

c. Training Coordinators.

d. Employees.

## Chapter 2

### Civilian Command-Level Strategic Workforce Planning

1. Purpose. To establish the United States Marine Corps (USMC) process for conducting Civilian Command-Level Strategic Workforce Planning (CLSWP).

2. Background

a. The National Defense Authorization Acts (NDAA) signed in 2006, 2008, 2009, 2010, and 2012 outlined requirements for DoD to perform Strategic Human Capital Planning and SWP, and report progress to Congress. Secretary of Defense (SECDEF) efficiency reviews have increased the need for agencies to identify redundancies and create new efficiencies in performing missions. Additionally, DoD budget decisions reduced funding levels used for acquiring and compensating our civilian workforce. As a result, Marine Corps issued references (i) and (j) addressing civilian requirement processes and hiring. Based on the initiatives described above, USMC conducted a force structure review and budget analysis to identify military and civilian requirements and projections across the Future Years Defense Program (FYDP).

b. In February 2011, the Deputy Commandant for Combat Development and Integration (DC, CD&I), Total Force Structure Division (TFSD), Deputy Commandant for Manpower and Reserve Affairs (DC, M&RA) and the Deputy Commandant for Programs and Resources (DC, P&R) worked in partnership to develop an integrated approach in conducting CLSWP. Central to this joint venture, senior Manpower/G-1 and Comptroller/G-8 representatives from each major command, along with all USMC Human Resources Directors formed a functional working group to collaborate on the various aspects of CLSWP. This collaborative effort led to the development of six standardized CLSWP process steps.

c. Through use of a CLSWP process, Marine Corps commands will analyze civilian workforce data and structure and make mission-based decisions using a total force view of work being performed. During the process, commands will use authorized manpower requirements identified in the Table of Organization and Equipment (TO&E), and authorized personnel funding budgets identified in Programming and Budgeting Documentation Database (PBDD).

d. When conducting CLSWP, a position-by-position review is performed. All positions and employee types (Military, Civilian and Contractor) within the command shall be input into the tool for the review. Using a total workforce approach allows commanders to consider all work being performed in order to identify/eliminate redundancies and develop efficiencies in accordance with the position management principles provided in reference (i).

e. The CLSWP process, described in paragraph 3 below, complements STFMP directed by DC, CD&I in reference (1). Although both processes have a specific purpose, applying them in unison will result in a more effective and efficient analysis of workforce requirements, structure, and composition. The six-step process employed by CLSWP mirrors the STFMP process. See Figure 2-1.

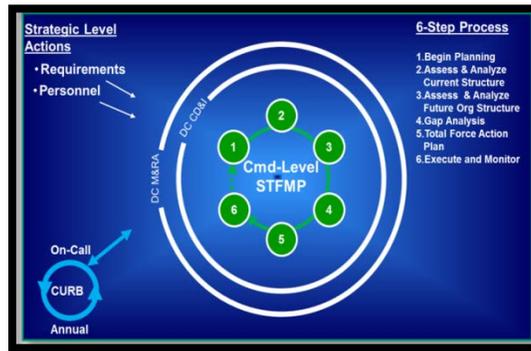


Figure 2-1.--Strategic Total Force Management and Planning Process Map.

f. Unique level-of-effort analysis techniques employed by STFMP are vital for determining and supporting any request for new workforce requirements. CLSWP does not duplicate this requirement, but provides an inclusive process that will enable commands conducting STFMP to implement decisions made during the process within their Strategic Workforce Plan.

### 3. Process Steps and Outcomes

a. CLSWP is the process for identifying, acquiring, developing, shaping and retaining the workforce needed for a command to accomplish its mission, functions and tasks. As Figure 2-2 demonstrates, the command-level process is a cyclic process divided into six primary steps. These steps and the desired outcomes of each are defined in the following paragraphs.

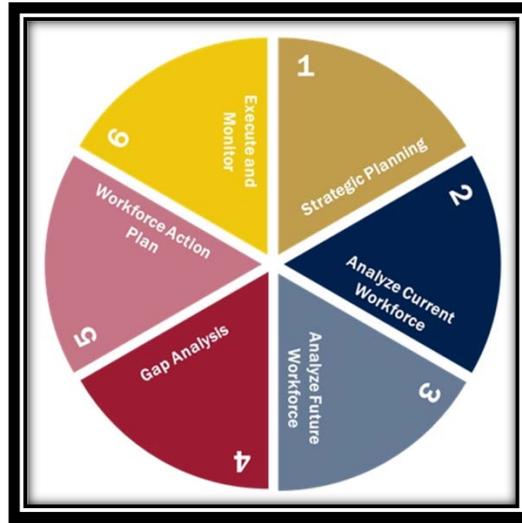


Figure 2-2.--Command-Level Strategic Workforce Planning Process Map

(1) Strategic Planning. Develop a shared understanding of the mission as it relates to the workforce; establish measurable objectives and priorities; and, identify primary workforce functions/tasks that enable the organization to achieve its mission. Per reference (g), mission requirements not derived from a competent authority shall be eliminated. Outcomes are:

(a) Short and long-term impacts to the civilian workforce as a result of:

1. Changes to mission.
2. Command Objectives and Priorities.
3. New programs/initiatives.
4. Constraints (e.g. labor budget).

5. Changes in technology/process improvements.

(b) A list of primary functions and associated primary tasks performed by all employee types (Military, Civilian and Contractor) within the command.

(2) Assess and Analyze Current Workforce. Review and assess current workforce position requirements and incumbents, demographic profiles, and funding across the FYDP. Determine trends and impacts to the workforce based on current and historical data. Outcomes are:

(a) Workforce Analysis Report

1. Current demographics.
2. Historic Trends (i.e. gains, losses, retirements).
3. Projected losses and retirements.
4. Barrier Analysis Strategies.

(b) Competencies/Skills Assessment of current workforce.

(c) Current workforce baseline; how the workforce is structured today

(3) Assess and Analyze Future Workforce. Develop a long range vision that will guide position structure, recruitment and employee development efforts. Outcomes are:

(a) Future Workforce Roadmap, which defined in Appendix E, shows the number of positions by series, grade, function and organization code that the organization requires for the next five years.

(b) Workforce Risk Assessment Impact Statement, referred to in Chapter 3, paragraph 8.

(4) Gap Analysis. Compare current and future workforce analyses to identify and prioritize differences in requirements. Outcomes are:

(a) Prioritized listing of all of the gaps that exist between the workforce baseline (today's workforce) and the desired workforce in five years.

(b) Description of the current and future state of each gap.

(5) Workforce Action Plan (WAP). Develop a document used to detail roles and responsibilities and the strategies, action steps, and milestones chosen to close gaps identified during the gap analysis.

(6) Execute and Monitor. Implement the WAP and monitor progress against an established timeline. The WAP must be frequently reviewed and adjusted as required.

#### 4. Requirements

a. During the CLSWP process, commands will:

(1) Identify and document data points for each position as it may apply to employee type, to include:

(a) Billet Identification Code.

(b) Employee type (Civilian, Military, or Contractor).

(c) Associated Function/Task.

(d) Occupational Series.

(e) Grade/Target Grade.

(f) Funding Source.

(g) Billet type (Perm, Direct Hire, NAF, Temp/Term, etc.).

(h) Priority/Criticality. Positions will be categorized using the following priority/criticality definitions:

1. High. Mission critical position directly aligned and vital to the achievement and future success of strategic goals/initiatives. Position cannot be gapped and must be filled via interim measures (military, civilian, contractor) during ongoing recruitment efforts.

2. Medium. Non-mission critical position either directly or indirectly linked to strategic goals/initiatives. The majority of positions fall within this category and, if vacant, may be gapped during on-going recruitment efforts without adverse impact to mission accomplishment.

3. Low. Non-mission critical position indirectly linked to strategic goals/initiatives. If vacant, position may be gapped during on-going recruitment efforts or subject to restructuring without significant adverse impact to mission accomplishment.

(2) Determine future Workforce Roadmap/organizational requirements.

(a) Manpower requirements by fiscal year (FY) (Current plus five years) reflecting data points listed above.

(b) Phased staffing plan, defined in Appendix E. Identify when modifications, additions, removals, and planned vacancies will take place. (i.e., FY, Quarter, etc.) Ensure all STFMP requirements identified by references (l) and (g) are executed appropriately.

(3) Reflect funding requirements by FY (current plus five years).

(a) Authorized civilian funding amount (Programmed budget).

(b) Actual civilian funding execution (Current cost).

(c) Planned civilian funding execution (Future cost).

b. As part of the CLSWP process, commands must develop a WAP. A sample of the WAP is provided in Appendix (D). The WAP, at a minimum, must include:

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(1) Prioritized Gaps.

(2) Strategies to address the gaps.

(3) Action steps, time requirements, and lead office responsible for executing the actions for each strategy.

c. Commands will review multi-year CLSWP plans annually at the beginning of each FY. A notional CLSWP project plan is provided in Appendix (C).

## Chapter 3

### Tools, Templates, and Techniques

1. General. DC M&RA (MPC) has identified a number of tools, templates and techniques to support commands throughout CLSWP. Each is described in the following paragraphs.

2. Total Workforce Management Services (TWMS)

a. TWMS is a web-based, CAC-enabled system that provides access to various workforce data based on user account type (Human Resources, Manpower, Financial, etc.).

b. Per reference (k) TWMS receives routine data feeds from Systems of Record such as:

(1) Defense Civilian Personnel Data System (DCPDS).

(2) Defense Eligibility Enrollment Reporting System (DEERS).

(3) Contractor Verification System (CVS).

(4) Total Force Structure and Management System (TFSMS).

(5) People Soft for Non-Appropriated Fund (NAF) Employees.

c. Multiple standard reports have been created to support workforce management and tools used in conducting CLSWP.

3. Strategic Workforce Analysis and Planning Application (SWAP APP)

a. The SWAP APP is a tool designed for generating civilian demographic and trend data used in developing workforce analysis reports.

b. Data for the tool is only available from the servicing Human Resources Office.

c. The SWAP APP can be downloaded from the MPC-30 website; <https://www.manpower.usmc.mil/CLSWP>.

4. Strategic Workforce Planning Toolbox (SWP Toolbox)

a. The SWP Toolbox provides the structure and methodology for navigating the CLSWP process and generating and recording the various results of scenarios selected by the SWPT.

b. Detailed reporting and analysis tools are built into the SWP Toolbox to allow the SWPT to review impacts to the workforce and associated costs as results are produced and recorded. These tools include:

- (1) Mission and objectives analysis.
- (2) Function and task analysis.
- (3) Establishment of a current workforce baseline.
- (4) Creation of multiple future workforce planning scenarios.
- (5) Workforce Decision Analysis (Decision charting feature).
- (6) Automated risk assessment template.
- (7) Budget impact reports.

c. The SWP Toolbox can be downloaded from the MPC-30 website; <https://www.manpower.usmc.mil/CLSWP>.

5. Command Developed Tools. Commands may continue to use any current tools developed to aid in their decision making process, however, utilization of the SWP Toolbox is required.

6. STFMP Mission-Functions-Task (MFT) Tool. TFSD developed a tool to support billet level analysis and is required by the STFMP. Outputs from the MFT Tool must be imported into the SWP Toolbox to provide a more detailed analysis of the impact that changes to the workforce will have on the mission, functions, and tasks performed by the organization. Additionally, this level of analysis is necessary when bringing forward and defending requests for new unfunded requirements to the Civilian Unfunded Review Board (CURB).

7. SWPT Project Charter. A SWPT project charter states the scope, objectives and participants in a project. It provides a preliminary delineation of roles, outlines the project scope, problem and goal statements, start/end date, identifies the team members, and defines the authority of the SWPT Leader. A sample SWPT Project Charter is provided in Appendix (B).

8. Risk Assessments

a. As commands conduct CLSWP, it is imperative that workforce structure be assessed against mission requirements. Based on strategic direction and any constraints (i.e., funding) identified during the strategic planning step, commands may determine specific functions or tasks can no longer be performed. If the loss of a specific function or task will impact mission performance, commands are required to prepare a summary impact statement to be forwarded up the chain of command for resolution if unable to resolve at their level.

b. Impact statements should include:

(1) Requirement, function and/or task at risk.

(2) Rationale for risk determination.

(3) How it would impact capability to perform the command's mission.

(4) Recommendation for mitigating risk.

c. The SWP Toolbox provides an automated template for producing risk assessments.

9. Notional Project Plan

a. The purpose of a project plan is to maintain control of a project. When conducting CLSWP there are a number of actions necessary to complete the project. A notional project plan identifying steps, tasks, and timeline is provided in Appendix (C).

b. The notional project plan is offered as a guideline and should be utilized or modified in accordance with each command's needs.

## Chapter 4

### Reporting Requirements

#### 1. General

a. Commands will utilize the SWP Toolbox discussed in Chapter 3 when conducting CLSWP. Commands will submit a completed toolbox via their chain of command to both DC M&RA (MPC) and DC CD&I at the end of the initial planning process or annual multi-year plan review but not later than the end of the FY. DC M&RA (MPC) will coordinate with DC P&R and DC CD&I as appropriate. This reporting requirement is exempt from reports control per reference (n), part IV, paragraph 7k.

b. Reports will be monitored by DC CD&I and DC M&RA to ensure Table of Organization and Equipment Change Requests (TOECRs) and hiring actions are processed appropriately.

APPENDIX A

STRATEGIC WORKFORCE PLANNING TEAM LEADER DESIGNATION LETTER

XXX  
SWP  
DATE

From: Command/HQMC Staff Agency Head  
To: Employee name

Subj: STRATEGIC WORKFORCE PLANNING TEAM LEADER (SWPT)

Ref: (a) MCO 12250.2, Command-Level Strategic Workforce  
Planning Procedures

1. In accordance with reference (a), effective this date, you are hereby appointed to the subject role. As the Strategic Workforce Planning Team Leader (SWPT) for UIC (Command/Staff Agency name), you are responsible for planning and monitoring execution of the command-level strategic workforce planning (CLSWP) effort. For the purposes of the CLSWP process, you shall liaison with the Program Office (MPC-30) for advice and recommendations.

2. Within 30 days, you will review reference (a), consult with our servicing Human Resources Office and the G1/G8s in preparing workforce plans, and obtain appropriate strategic planning documents to support strategic planning efforts.

3. You have my commitment toward ensuring that you and your team have the tools and resources needed when developing and implementing staffing strategies and plans.

SIGNATURE

Copy to:  
MPC-30  
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APPENDIX B

SAMPLE STRATEGIC WORKFORCE PLANNING CHARTER FORMAT

	<p><b>Project Charter</b> <i>COMMAND</i> <b>STRATEGIC WORKFORCE PLANNING</b></p>	<p><b>Date Initiated:</b>  <b>Revision Date:</b></p>
<b>1. Project Information</b>		
Deployment or Implementation Champion:		
Project Sponsor:		
Estimated Start Date:		
Estimated End Date:		
<b>2. Problem Statement</b>		
<b>3. Goal Statement</b>		
<b>4. Project Scope</b>		
<b>5. SWP Team Members</b>		
<b>Name</b>	<b>Role</b>	<b>Organization</b>
	<b>Project Manager</b>	
<b>Manpower/G1</b>	<b>Primary Member</b>	
<b>Comptroller/G8</b>	<b>Primary Member</b>	
<b>HRO SWP Consultant</b>	<b>Primary Member</b>	
<b>HRO LR</b>		
<b>6. Approvals/Signatures</b>		
	<b>Signature</b>	<b>Date</b>
Project Sponsor		
Deployment/Implementation Champion		

Template

APPENDIX C

NOTIONAL STRATEGIC WORKFORCE PLANNING PROJECT PLAN

<b>Notional Strategic Workforce Planning Project Plan</b>	
<b>Step / Tasks</b>	<b>Lead</b>
<b>Initiate the USMC CLSWP process</b>	
Designate in writing an overall CLSWP Lead for the Command	
<p>Establish a CLSWP Team (SWPT)</p> <ul style="list-style-type: none"> <li>• At a minimum the SWPT must include representatives from Budget, Manpower, and Human Resources but may include representatives from other parts of the organization</li> <li>• A charter for the SWPT shall be developed and signed to ensure a thorough understanding of the goals and objectives of the CLSWP process</li> </ul> <p>Communicate to all key stakeholders in the organization information on the CLSWP initiative and expected results and benefits</p>	<b>Commander</b>
<b>Step 1 Strategic Planning</b>	
<p>Set date for an initial meeting and develop a list of documents for review prior to that meeting. Types of documents should include:</p> <ul style="list-style-type: none"> <li>• Relevant DoD/DON Strategic Guidance</li> <li>• USMC Strategic Guidance (e.g. CMC Guidance, Vision 2025, Community of Interest)</li> <li>• Command Strategic Guidance (e.g. Commander's Intent)</li> <li>• Manpower Authorizations (e.g. FSRG Results)</li> <li>• Labor Budget Authorizations</li> <li>• Relevant sections of applicable Collective Bargaining Agreements and Memorandums of Understanding with Labor Organizations</li> </ul>	<b>SWPT Lead</b>

<p>Members review documents and come to the initial meeting prepared to discuss the significance of the documents with respect to the mission, their functional area of expertise and the workforce.</p>	<p><b>SWPT</b></p>
<p>Facilitate the initial meeting to accomplish the following goals:</p> <ul style="list-style-type: none"> <li>• Develop a shared understanding of all higher level guidance and possible impact to Command mission and workforce</li> <li>• Take advantage of functional expertise in the SWPT, develop a list of impacts to the mission and workforce, and identify changes expected to occur as a result</li> <li>• Identify risks to the workforce and mission accomplishment in the future</li> </ul>	<p><b>SWPT Lead</b></p>
<p>Establish additional Teams to support the planning process as needed.</p> <ul style="list-style-type: none"> <li>• Organizational</li> <li>• Divisional</li> <li>• Branch</li> <li>• Other</li> </ul> <p>Note: Additional teams can help define the Goals/Functions and Objectives/Tasks essential for mission accomplishment at lower levels for roll-up and incorporation into an organizational view. It's important to involve key stakeholders in shaping the strategic direction for the workforce.</p>	<p><b>SWPT Lead</b></p>
<p>Hold subsequent SWPT meetings as required to develop the required outputs.</p>	<p><b>SWPT</b></p>
<p><b>Step 2 Assess and Analyze Current Workforce</b></p>	
<ul style="list-style-type: none"> <li>• Load standard demographic from the Total Workforce Management System (TWMS) into the Strategic Workforce Assessment and Planning Application (SWAP App). This app will provide charts, table and graphs based on loaded data: <ul style="list-style-type: none"> <li>o Key Workforce Demographics (e.g., Years of Service, Retirement Eligibility)</li> <li>o Historic Gains/Loss charts and future</li> </ul> </li> </ul>	<p><b>Human Resources</b></p>

<p>projections of Gains/Loss based on historic trends and likely future workforce demographics</p> <p>O Historic and Current On-Board Data</p>	
<p>Compile other key workforce metrics as required and where data is available. Other types of analyses may include:</p> <ul style="list-style-type: none"> <li>• Competency Analysis <ul style="list-style-type: none"> <li>o Analyze required competencies and proficiency levels for each position in the organization</li> <li>o Instruct supervisors to assess competency levels of each of their direct reports and measure employee competency levels against position requirements</li> </ul> </li> <li>• Employee Satisfaction <ul style="list-style-type: none"> <li>o Analyze the current level of employee job satisfaction and engagement using survey data</li> </ul> </li> </ul>	<p><b>SWPT</b></p>
<p>Conduct analysis of the above metrics to prepare the Workforce Analysis Report. This report should contain:</p> <ul style="list-style-type: none"> <li>• Analysis of workforce demographic and trend data</li> <li>• Competency Analysis</li> <li>• Analysis of available survey data</li> <li>• An Executive Summary - highlights the significant findings</li> </ul>	<p><b>SWPT</b></p>
<p>Identify current civilian labor budget authorizations</p> <ul style="list-style-type: none"> <li>• Programming and Budget Documentation Database (PBDD)</li> </ul>	<p><b>BUDGET</b></p>
<p>Import current data into the Workforce Planning Document (WPD):</p> <ul style="list-style-type: none"> <li>• Use TWMS report: CLSWP Extract</li> </ul>	<p><b>SWPT Manpower</b></p>
<p>Evaluate each position to determine priority/criticality levels (High, Medium, Low) and</p>	<p><b>SWPT</b></p>

<p>input this information into the WPD.</p> <ul style="list-style-type: none"> <li>• High - Mission critical position directly aligned and vital to the achievement and future success of strategic goals/initiatives. Position cannot be gapped and must be filled via interim measures (military, civilian, contractor) during on-going recruitment efforts</li> <li>• Medium - Non-mission critical position either directly or indirectly linked to strategic goals/initiatives. The majority of positions fall within this category and, if vacant, may be gapped during on-going recruitment efforts without adverse impact to mission accomplishment</li> <li>• Low - Non-mission critical position indirectly linked to strategic goals/initiatives. If vacant, position may be gapped during ongoing recruitment efforts or subject to restructuring without significant adverse impact to mission accomplishment</li> </ul>	
<p>Identify functions and tasks associated with each position and input into the WPD</p>	<p><b>SWPT</b></p>
<p><b>Step 3 Assess and Analyze Future Workforce</b></p>	
<p>Identify Future Workforce Requirements for next 5 years to include :</p> <ul style="list-style-type: none"> <li>• Review with organizational leader <ul style="list-style-type: none"> <li>o organizational charts</li> <li>o position descriptions</li> <li>o mission changes</li> </ul> </li> <li>• Knowledge of retirements and other attrition</li> <li>• Prioritized functions and tasks essential to the mission</li> </ul> <ul style="list-style-type: none"> <li>• Number, grade and type (civilian, military, contractor) of positions by functional area</li> <li>• Competencies required for future positions</li> <li>• Other factors, such as employee satisfaction metrics, barrier analysis, diversity goals, etc.</li> </ul>	<p><b>SWPT</b></p>
<p>Use the WPD to further define the structure of the workforce - this will help develop the future structure of the organization and what position</p>	<p><b>SWPT</b></p>

<p>management actions will need to be taken to get there.</p> <ul style="list-style-type: none"> <li>• Input the desired future state of the workforce by removing, modifying, or adding positions as required within the document</li> <li>• Map out the evolution of the workforce structure by inputting position changes in each year of the document through the final year.</li> <li>• Use scenario planning feature built into the WPD to create multiple versions of future workforce and budget, and analyze baseline workforce and budget</li> </ul>	
<p>Finalize a Future Workforce Roadmap that fully defines a future state of the workforce in the next 5 years. This document should include:</p> <ul style="list-style-type: none"> <li>• An Organizational Chart / Workforce Requirements that support mission, functions and tasks given projected constraints</li> <li>• A plan for how the organization will evolve from the current org structure to the desired future state. This will be contained in the WPD</li> <li>• Proper mix of employees</li> <li>• Number and type (civilian, military, contractor) by function</li> <li>• Competencies required for future positions</li> <li>• Fully defined workforce goals in areas such as employee satisfaction, diversity, engagement, etc.</li> <li>• Risks that may impact mission accomplishment in the future</li> </ul>	<p><b>SWPT</b></p>
<p><b>Step 4 Gap Analysis</b></p>	
<p>Begin by using the WPD to identify workforce structure gaps. Identified gaps may be related to:</p> <ul style="list-style-type: none"> <li>• Labor and Manpower budget authorizations</li> <li>• Appropriate grade of employee type (i.e., military, civilian)</li> <li>• Misaligned/imbalanced organizational structure</li> <li>• Retention or projected attrition issues (i.e. leading to gaps in functional areas, critical</li> </ul>	<p><b>SWPT</b></p>

<p>knowledge/skills, diversity, etc.) Competency levels by function, task, occupation series</p> <ul style="list-style-type: none"> <li>• Mix of "High", "Medium", or "Low" priority positions</li> <li>• Critical positions or occupations <ul style="list-style-type: none"> <li>o Diversity</li> <li>o Training and development</li> <li>o Organizational climate</li> <li>o Other areas specific to the command</li> </ul> </li> </ul>	
<p>Using the Future Workforce Roadmap and comparing it against the Workforce Analysis Report, identify other workforce gaps that will need to be addressed. Examples of these may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Required competencies</li> <li>• Diversity profile</li> <li>• Employee satisfaction / engagement</li> <li>• Technology used by the workforce</li> <li>• Education / Certifications</li> </ul>	<p><b>SWPT</b></p>
<p><b>Step 5 Workforce Action Plan</b></p>	
<p>For each gap listed on the Gap Analysis Template, analyze the following:</p> <ul style="list-style-type: none"> <li>• Feasibility of closing the gap (level of effort)</li> <li>• Cost of closing the gap</li> <li>• Benefits of closing the gap</li> <li>• Timeline for closing the gap</li> <li>• Human Resources options</li> </ul>	<p><b>SWPT</b></p>
<p>Identify strategies that will be implemented to close the gap.</p> <ul style="list-style-type: none"> <li>• The Strategy Resource Table should be used to identify available strategies and when they should be used</li> <li>• The Strategy Resource Table requires engaging your servicing HR representative</li> <li>• More than one strategy may be required, depending on the scope of work required to close the gap</li> </ul>	<p><b>SWPT</b></p>

Gain consensus within the SWPT on which gaps to address and present to the Commander for approval	<b>SWPT</b>
<p>For each gap, develop an implementation plan (the action steps you will take to implement the strategy) using the Workforce Action Plan Template as a guide. The template shall provide:</p> <ul style="list-style-type: none"> <li>• Gap Definition</li> <li>• Strategy Explanation</li> <li>• Priority</li> <li>• Owner</li> <li>• Action steps that will be taken to implement the strategy</li> <li>• Completion dates of action steps</li> <li>• Lead for each action step</li> <li>• Potential issues and Risks</li> </ul>	<b>SWPT</b>
Develop the Workforce Action Plan using individual templates created for each gap, along with more detailed supporting information and plans if necessary	<b>SWPT</b>
Gain approval of senior leadership and buy-in of key stakeholders on a final Workforce Action Plan	<b>SWPT LEAD</b>
<b>Step 6 Execute and Monitor</b>	
The assigned owner of each strategy or set of strategies to close workforce gaps shall execute the plan and report progress to the SWPT Lead on a recurring basis using the Workforce Action Plan. The plan shall include measuring progress against the evaluation criteria to determine success of the strategy implementation.	<b>Strategy Owners</b>
Use the Gap Status Report to report progress on implementing the strategies in the Workforce Action Plan.	<b>SWPT</b>
Adjust the Workforce Action Plan as necessary as priorities change and unforeseen events occur or as resource availability changes	<b>SWPT</b>

APPENDIX D

WORKFORCE ACTION PLAN FORMAT

<b>Gap Name</b>	
<b>Strategy</b>	
<b>Priority</b>	
<b>Owner</b>	

<b>Status</b>
<b>RED</b>

<b>Action Step</b>	<b>Start Date</b>	<b>Completion Date</b>	<b>Lead</b>	<b>Complete (Y/N)</b>

APPENDIX E

DEFINITIONS

**Analytics**. The process of obtaining an optimal and realistic decision based on existing data.

**Barrier Analysis**. The process that examines relevant data, trends and benchmarks to identify a policy, practice or procedure that limits or tends to limit employment opportunities.

**Command**. Organizational units reporting to Major Subordinate Commands (MSCs) and having their own financial Unit Identification Code (UIC).

**Commander, Commanding Officer and Staff Agency Heads**. The senior person in charge of each MSC, command, and HQMC staff agency.

**Functions. Major lines of work performed by Marine Corps personnel**. The 16 functions are: Administrative, Analytical, Acquisition, Command, Contracts, Fiscal, Intelligence, Information Technology, Logistics, Law Enforcement, Mission Assurance, Manpower, Operations, Policy, Requirements, and Training/Education.

**Future Workforce Roadmap**. Detailed results of decisions made on the WPD that lead to changes to the baseline organizational structure.

**HQMC Staff Agency**. Manpower and Reserve Affairs; Programs and Resources (to include TSO); Plans, Policies, and Operations (to include Joint Non-Lethal Weapons and MCIOC); Aviation, Command, Control, Communications and Computers (to include MCNOSC); Intelligence (to include MCIA), Administration and Resource Management, and Marine Corps Operational Test and Evaluation Activity; and Director of the Marine Corps Staff/Office of the Staff Director (to include remaining HQMC directorates not listed separately).

**Level of Effort**. Identification of functions or tasks that occur on a regular basis to include roles and resources assigned to an activity that accomplishes a specific goal.

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**Major Subordinate Commands (MSC).** Marine Forces Commands; Marine Corps Combat Development Command, Marine Corps Installations Command; Marine Corps Recruiting Command; Marine Corps Logistics Command, and Training and Education Command.

**Mission.** As defined by the Mission Statement, it is the complete list of over-arching mission of the Unit, along with task and support both internal and external needed to accomplish the mission for that unit. The Mission Statement contains promulgation statement, organizational overview, list out primary mission, task that help meet the mission, concept of organization, concept of employment, administrative support (up and down depending on level of the unit), logistic capabilities, and command and signal.

**Organization.** All Marine Corps commands containing appropriated funded civilian position requirements or non-appropriated funded positions paid using appropriated funds.

**Organizational Structure.** Starting point at which all billet identification code (BIC), employees, status, and associated costs are identified and validated as correct using the Workforce Planning Document within the SWP Toolbox. Table of Organization (T/O) codifies the Commander's requirements.

**Phased Staffing Plan.** Phased actions, such as adding, removing, or changing billets within a unit over FYs.

**Table of Organization (T/O).** A list of all billets, military (Active and Reserves) and civilian (appropriated), along with their attributes (Billet, Military, Occupational Specialty (BMOS), Series, Alpha Grade, etc.) that are required by the Command (Unit) to meet the "requirements" to successfully meet their mission statement requirements.

**Task.** Any actions or work that an individual will need to accomplish in support of unit's mission statement. Task can be defined as part of unit's mission statement task list or broken down to lowest level of action or work (i.e. drafts 5400 Bulletin).

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**Unit Identification Code (UIC)**. Unique six character alphanumeric number that identifies a unit within Total Force Structure Management System (TFSMS). Usually the Reporting Unit Code (RUC) for unit has "M" placed at the front of existing RUC as standard UIC for that unit. However, since there are mirroring issues with converting from legacy Table of Manpower and Requirements (T/MR) into TFSMS not all UICs are always same as RUC, with M at the front. Each unit within TFSMS will have its own unique UIC whether they are stand alone or part of mirrored group.

**Acronyms**

BIC.....Billet Identification Code  
CLSWP.....Command-Level Strategic Workforce Planning  
COI.....Community of Interests  
CURB.....Civilian Unfunded Review Board  
CVS.....Contractor Verification System  
DEERS.....Defense Eligibility Enrollment Reporting System  
DC CD&I.....Deputy Commandant for Combat Development and  
Integration  
DC M&RA.....Deputy Commandant Manpower & Reserve Affairs  
DC P&R.....Deputy Commandant for Programs and Resources  
DCPDS.....Defense Civilian Personnel Data System  
FYDP.....Future Years Defense Program  
HRD.....Human Resources Directors  
HRO.....Human Resources Officer  
MPC.....Civilian Workforce Management Branch  
NAF.....Non-Appropriated Fund  
NDAA.....National Defense Authorization Acts  
PBDD.....Programming and Budgeting Documentation Database  
STFMP.....Strategic Total Force Management Planning  
SWAP APP.....Strategic Workforce Analysis and Planning  
Application  
SWPT.....Strategic Workforce Planning Teams  
TFSMS .....Total Force Structure and Management System  
TFSD .....Total Force Structure Division  
TO&E.....Table of Organization and Equipment  
TOECR.....Table of Organization and Equipment Change  
Requests  
TWMS.....Total Workforce Management Services  
WAP.....Workforce Action Plan