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| 5HR02  Talent Management and Workforce Planning |
| *Learner Assessment Brief*  **Assessment ID / CIPD\_5HR02\_21\_01** |

*Level 5*

*Associate Diploma in*

* People Management

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| Learner surname/family name |  | | | | | | | | |
| Learner other names |  | | | | | | | | |
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| Assessor name (1st submission) |  | | | | | | | | |
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| Assignment submission date |  | | | | | | | | |
| Assignment re-submission date for centre marking (2nd Submission) |  | | | | | | | | |
| Assignment re-submission date for centre marking (3rd Submission) |  | | | | | | | | |

**5HR02**

**Talent Management and Workforce Planning**

This unit assessment focuses on the impact of effective workforce planning in considering the development of diverse talent pools and how to contract and onboard the workforce. It also includes analysis of the potential costs to the organisation if this is poorly managed, and the tools and interventions required to mitigate this risk.

### CIPD’s insight

#### Talent Management

Talent management seeks to attract, identify, develop, engage, retain and deploy individuals who are considered particularly valuable to an organisation. It should align with business goals and strategic objectives. By managing talent strategically, organisations can build a high-performance workplace, encourage a ‘learning’ organisation, add value to their employer brand, and improve diversity management. For these reasons, people professionals consider talent management to be among their key priorities.

#### [Talent Management | Factsheets | CIPD](https://www.cipd.co.uk/knowledge/strategy/resourcing/talent-factsheet#7248)

#### Workforce Planning Practice

People in charge of organisations, teams or projects have always needed to plan how activities will be accomplished. Such planning inevitably involves recruiting, training and deploying the people needed to get the work done. But if managers wait until the moment the work has to be done, the people and skills needed to do it will simply not be there.

Effective and timely workforce planning goes beyond forecasting headcount and can provide agile people solutions to complement the future direction of your business.

A strategic workforce plan informs good business decisions and yields important data such as hiring ease or difficulty, time to hire, time to productivity, attrition rates and so on, which can help identify risks and contingency actions.

Workforce Planning Practice is the CIPD members’ guide setting out the steps to workforce planning for HR professionals and line managers. Examples throughout will show that change and uncertainty make planning especially critical, and that through a structured planning process, organisations can position themselves not merely to survive but to thrive by mapping and securing the workforce resources they need now and for the future. (See the workforce planning guide behind the link).

[Workforce planning practice | CIPD | Guidance](https://www.cipd.co.uk/knowledge/strategy/organisational-development/workforce-planning-practice#gref)

(Follow this link to find a range of useful resources relevant to this unit assessment.

Workforce Planning

Workforce planning is a core business process which aligns changing organisation needs with people strategy. It can be the most effective activity an organisation can engage in. It doesn’t need to be complicated and can be adjusted to suit the size and maturity of any organisation. It can provide market and industry intelligence to help organisations focus on a range of challenges and issues, and prepare for initiatives to support longer term business goals.

This factsheet examines the concept of workforce planning. It distinguishes between strategic and operational workforce planning, 'hard' and 'soft' workforce planning, which work together to generate and analyse information before planning actions. It also explores the stages of the workforce planning process and highlights key issues and action points for implementation.

[Workforce Planning | Factsheets | CIPD](https://www.cipd.co.uk/knowledge/strategy/organisational-development/workforce-planning-factsheet#8035)

*Case study*

You are a senior people practice manager BMG Engineering Ltd based in the GCC (you decide the exact location). BMG provides machinery and components in support of the dairy industry. The company has experienced turbulent change over the last 10 years, largely due to changing technology, which has required frequent changes to production methods and processes, with the inevitable effect on the bottom line. The company was struggling economically before the Pandemic – but COVID has had an even more significant effect than technological change. To survive, the organisation must undergo a significant restructuring and organisational design change. The change will inevitably involve downsizing the overall operation, including the shedding of some employees whose roles are no longer required. As well as losing some employees, the business will need to attract and recruit some new talent, capable of coping with the new technological requirements of the manufacturing processes, but also willing to adopt new approaches to work based on less rigid work practices and more focus on agility and flexibility.

The CEO has asked you, as an expert in talent management and workforce planning, to adopt the role of internal consultant, to guide the organisation through the next phase in BMG’s development.

#### *Preparation for the Tasks:*

* At the start of your assignment, you are encouraged to plan your assessment work with your Assessor and where appropriate agree milestones so that they can help you monitor your progress.
* Refer to the indicative content in the unit to guide and support your evidence.
* Pay attention to how your evidence is presented, remember you are working in the People Practice Team for this task.
* Ensure that the evidence generated for this assessment remains your own work.

#### *You will also benefit from:*

* Acting on formative feedback from your Assessor.
* Reflecting on your own experiences of learning opportunities and training and continuing professional development.
* Reading the CIPD Insight, Fact Sheets and related online material on these topics



# *Task One – Presentation Pack*

The CEO has asked you to prepare a presentation, which he will deliver to the senior management team. The theme of the presentation is ‘Key contemporary labour market trends and their significance for workforce planning.’ He has asked that the presentation includes a focus on turnover and retention trends and the factors that influence why people choose to leave or remain. The presentation pack needs to include slides and speaker notes. The CEO has emphasised he wants to see evidence of research and wide reading in the speaker notes, which he needs to guide his thinking and his own research into the themes identifies in the presentation.

The presentation must include:

* An explanation on how organisations strategically position themselves in competitive labour markets. (AC 1.1)
* An explanation of the impact of changing labour market conditions on resourcing decisions. (AC 1.2)
* A discussion on the role of government, employers and trade unions in ensuring future skills are met. (1.3)
* An examination of turnover and retention trends and the factors that influence why people choose to leave or remain. (AC 3.1)

Your evidence must consist of:

* Slide deck and presenter notes (approximately 1**000 words**, refer to CIPD word count policy) **You must include the relevant Assessment Criteria (AC) on each slide. For example (AC 1.1, AC 1.2) etc.**
* **IMPORTANT NOTE:** At Associate Level Referencing is **mandatory** – you must provide a reference where you have drawn from a secondary source; Harvard referencing is preferable. . Please use the Reference box provided to record all of your long references. Short references should be included within the narrative.
* Upload the completed Learner Assessment brief, with both tasks completed (and the powerpoint presentation) through the Assignments option in the Oakwood Learner Hub.

# *Task Two – Management Briefing Guide*

The CEO had advised you he wants to see all levels of management involved in the planning and execution of BMG’s next phase of development, which will lead to an agile, adaptive organisation ready to take on planned and unexpected challenges in a VUCA world. To inform and educate managers, the CEO has asked you to produce a management briefing guide focusing on ‘Talent Management and Workforce Planning.’

He has asked for a professionally completed draft – the document, once approved, will be produced in a brochure format. He is looking for a complete draft that can be sent to the printers for immediate production. He as asked also that you draw from secondary sources to support the academic content of your draft, including Harvard Referencing.

The Management Briefing Guide is to be structured in two sections as follows:

**Section 1 – Workforce Planning**

* An analysis of the impact of effective workforce planning. (AC 2.1)
* An evaluation of the techniques used to support the process of workforce planning. (AC 2.2)
* An explanation of the approaches to succession planning and contingency planning aimed at mitigating workforce risks. (2.3)
* An assessment of the strengths and weaknesses of different methods of recruitment and selection to build effective workforces (AC 2.4)

**Section 2 – Talent Management**

* A comparison of different approaches to developing and retaining talent on an individual and group level. (AC 3.2)
* An evaluation of approaches that an organisation can take to build and support different talent pools. (AC 3.3)
* An evaluation of the benefits of diversity in building and supporting talent pools. (AC 3.4)
* An explanation of the impact associated with dysfunctional employee turnover. (AC 3.5)

**Section 3 – Contractual Arrangements and Onboarding**

* An assessment of suitable types of contractual arrangements dependent on specific workforce needs. (AC 4.1)
* Differentiation between the main types of contractual terms in contracts (AC 4.2)
* Explanation of the components and benefits of effective onboarding. (AC 4.3)

Your evidence must consist of:

* Management briefing document (2,900 words)
* **IMPORTANT NOTE:** At Associate Level Referencing is **mandatory** – you must provide a reference where you have drawn from a secondary source; Harvard referencing is preferable.

All written reports, including PowerPoint presentation notes, must include an appropriate level of referencing

* Upload the completed Learner Assessment brief, with both tasks completed, through the Assignments option in the Oakwood Learner Hub.

*Management Briefing Document 2900 words*

### Section 1 – Workforce Planning

**IMPORTANT NOTE:** At Associate Level Referencing is **mandatory** – you must provide a reference where you have drawn from a secondary source; Harvard referencing is preferable.

All written reports, including PowerPoint presentation notes, must include an appropriate level of referencing

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| An analysis of the impact of effective workforce planning. (AC 2.1) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
| *Type here…* |

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| An evaluation of the techniques used to support the process of workforce planning. (AC 2.2) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| An explanation of the approaches to succession planning and contingency planning aimed at mitigating workforce risks. (2.3) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| An assessment of the strengths and weaknesses of different methods of recruitment and selection to build effective workforces (AC 2.4) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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### Section 2 – Talent Management

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| A comparison of different approaches to developing and retaining talent on an individual and group level. (AC 3.2) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| An evaluation of approaches that an organisation can take to build and support different talent pools. (AC 3.3) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| An evaluation of the benefits of diversity in building and supporting talent pools. (AC 3.4) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| An explanation of the impact associated with dysfunctional employee turnover. (AC 3.5) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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### Section 3 – Contractual Arrangements and Onboarding

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| An assessment of suitable types of contractual arrangements dependent on specific workforce needs. (AC 4.1) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| Differentiation between the main types of contractual terms in contracts (AC 4.2) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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| Explanation of the components and benefits of effective onboarding. (AC 4.3) **Short references should be added into your narrative below. Please remember to only list your long references in the Reference box provided at the end of this section.** |
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### References

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| **Please provide your full reference list here. The Harvard method is preferable. If you are submitting a PowerPoint please also ensure you add a final slide which includes your long reference list as well.** |
|  |

Assessment Criteria Evidence Checklist

Use this as a checklist to make sure that you have included the required evidence to meet the task.   
Please enter the evidence title and where it can be referred to. An example has been provided for you which you should follow in each box.

|  |  |  |  |
| --- | --- | --- | --- |
| **Task 1 – Guidance Document Assessment criteria** | | **Evidenced Y/N** | **Evidence reference** |
| 1.1 | Explain how organisations strategically position themselves in competitive labour markets. |  | *Guidance Document.* |
| 1.2 | Explain the impact of changing labour market conditions on resourcing decisions. |  |  |
| 1.3 | Discuss the role of government, employers and trade unions in ensuring future skills needs are met. |  |  |
| 3.1 | Examine turnover and retention trends and the factors that influence why people choose to leave or remain. |  |  |

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| **Task 2 – Management Briefing - Assessment criteria** | | **Evidenced Y/N** | **Evidence reference** |
| 2.1 | Analyse the impact of effective workforce planning. |  | *Guidance Document.* |
| 2.2 | Evaluate the techniques used to support the process of workforce planning. |  |  |
| 2.3 | Explain approaches to succession and contingency planning aimed at mitigating workforce risks. |  |  |
| 2.4 | Assess the strengths and weaknesses of different methods of recruitment and selection to build effective workforces. |  |  |
| 3.2 | Compare different approaches to developing and retaining talent on an individual and group level. |  |  |
| 3.3 | Evaluate approaches that an organisation can take to build and support different talent pools. |  |  |
| 3.4 | Evaluate the benefits of diversity in building and supporting talent pools. |  |  |
| 3.5 | Explain the impact associated with dysfunctional employee turnover. |  |  |
| 4.1 | Assess suitable types of contractual arrangements dependent on specific workforce need. |  |  |
| 4.2 | Differentiate between the main types of contractual terms in contracts. |  |  |
| 4.3 | Explain the components and benefits of effective onboarding. |  |  |

### Declaration of Authentication

#### *Declaration by learner - if this is not completed your assessment brief will be returned unmarked.*

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| **I can confirm that this assessment is all my own work and where I have used materials from other sources, they have been properly acknowledged and referenced.**  **If you are submitting referred work please provide a new date next to your wet signature as you must confirm each submission is your own work.** |
| **Learner name:** |
| **Learner signature:**  **We cannot accept a typed or e-signature**. You need to scan or photograph your handwritten signature and  insert the image here. |
| **Date:** |

*Declaration by Assessor*

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| **I confirm that I am satisfied that to the best of my knowledge, the work produced is solely that of the learner.**   |  |  | | --- | --- | | **1st submission Assessor name:** |  | | **Assessor signature:** |  | | **Date:** |  | | **2nd submission Assessor name:** |  | | **Assessor signature:** |  | | **Date:** |  | | **3rd submission Assessor name:** |  | | **Assessor signature:** |  | | **Date:** |  | |

5HR02

Talent Management and Workforce Planning

# *Assessment Criteria marking descriptors.*

Assessors will mark in line with the following assessment criteria (AC) marking descriptors, and will indicate where the learner sits within the marking band range **for each AC**.

Assessors must provide a mark from 1 to 4 for each assessment criteria within the unit. Assessors should use the mark descriptor grid as guidance so they can provide comprehensive feedback that is developmental for learners. Please be aware that not all the mark descriptors will be present in **every** assessment criterion, so assessors must use their discretion in making grading decisions.

The grid below shows the range for each unit assessment result based on total number of marks awarded across all assessment criteria.

To pass the unit assessment learners must achieve a 2 (Low Pass) or above for each of the assessment criteria.

The overall result achieved will dictate the outcome the learner receives for the unit, provided **NONE** of the assessment criteria have been failed or referred.

Please note that learners will receive a **Pass or Fail** result from the CIPD at unit level. **Referral** grades can be used internally by the centre.

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| --- | --- |
| **Overall mark** | **Unit result** |
| **0 to 29** | **Fail** |
| **30 to 38** | **Low Pass** |
| **39 to 49** | **Pass** |
| **50 to 60** | **High Pass** |

# *Marking Descriptors*

| **Mark** | **Range** | **Descriptor** |
| --- | --- | --- |
| **1** | **Fail** | Insufficient demonstration of knowledge, understanding or skills (as appropriate) required to meet the AC.  Insufficient examples included, where required, to support answers.  Presentation and structure of assignment is not appropriate and does not meet the assessment brief.  Insufficient or unacceptable referencing |
| **2** | **Low Pass** | Demonstrates an acceptable level of knowledge, understanding or skills (as appropriate) required to meet the AC.  Sufficient and acceptable examples included, where required, to support answers.  Required format adopted but some improvement required to the structure and presentation of the assignment.  Answers are acceptable but could be clearer in responding to the task and presented in a more coherent way.  Acceptable referencing but may contain some minor mistakes. Range of sources cited are credible but limited. |
| **3** | **Pass** | Demonstrates good knowledge, understanding or skills (as appropriate) required to meet the AC.  Includes confident use of examples, where required, to support each answer.  Presentation and structure of assignment is appropriate for the assessment brief.  Answers are clear and well expressed.  Effective use of referencing from credible sources. |
| **4** | **High Pass** | Demonstrates a wide range and confident level of knowledge, understanding or skill (as appropriate).  Includes strong examples that illustrate the point being made, that link and support the answer well.  Answers are applied to the case organisation or an alternative organisation.  Answers are clear, concise and well argued, directly respond to what has been asked.  The presentation of the assignment is well structured, coherent and focusses on the need of the questions.  Highly effective use of referencing from a wide range of credible sources |

# *Marking grid*

| **Task One – Assessment criteria** | | **Mark (1-4)** |
| --- | --- | --- |
| 1.1 | Explain how organisations strategically position themselves in competitive labour markets. |  |
| 1.2 | Explain the impact of changing labour market conditions on resourcing decisions. |  |
| 1.3 | Discuss the role of government, employers and trade unions in ensuring future skills needs are met. |  |
| 3.1 | Examine turnover and retention trends and the factors that influence why people choose to leave or remain. |  |
|  | **Total for this task** |  |

| **Task Two – Assessment criteria** | | **Mark (1-4)** |
| --- | --- | --- |
| 2.1 | Analyse the impact of effective workforce planning. |  |
| 2.2 | Evaluate the techniques used to support the process of workforce planning. |  |
| 2.3 | Explain approaches to succession and contingency planning aimed at mitigating workforce risks. |  |
| 2.4 | Assess the strengths and weaknesses of different methods of recruitment and selection to build effective workforces. |  |
| 3.2 | Compare different approaches to developing and retaining talent on an individual and group level. |  |
| 3.3 | Evaluate approaches that an organisation can take to build and support different talent pools. |  |
| 3.4 | Evaluate the benefits of diversity in building and supporting talent pools. |  |
| 3.5 | Explain the impact associated with dysfunctional employee turnover. |  |
| 4.1 | Assess suitable types of contractual arrangements dependent on specific workforce need. |  |
| 4.2 | Differentiate between the main types of contractual terms in contracts. |  |
| 4.3 | Explain the components and benefits of effective onboarding. |  |
|  | **Total for this task** |  |

|  |  |
| --- | --- |
| **Total marks for unit** |  |