**WHS Planning Tool**

Instructions to complete the tool:

1. Collect all the necessary information required to complete the Planning Tool, such as:
   1. Copies of any Management Review Presentations and Meeting minutes
   2. Copy of the previous WHS & IM Management Plan
   3. Copy of the Training Matrix or equivalent.
   4. Copy of a completed and detailed incident analysis (e.g., safety, environment, complaints, food safety incidents) for your site / program
   5. Activities Schedule
2. Work through each section of the working tool, working across each column. There are prompting notes in each section to assist your thinking. When completing each section, delete and write over the top of each of the prompting notes.
3. You are able to develop one (1) or several objectives and targets to address any areas of opportunity you identify in the working tool.

PART A:

1. Analysis: Define the areas of analysis within Catholic Church Endowment Society Inc. (CCES) over the past 12 months
2. Performance: Conduct a review of performance against each of the areas of analysis you have identified. The more detail and specific you are, the easier it becomes to determine whether you will draft a new objective.
3. Objectives, Performance Indicators, and Targets: Where you have identified a deficiency, or where you have not met your expected performance as detailed in the Performance section, determine what/if any objectives you will develop to address the deficiency, what your performance indicators will be for that objective, and specific target for that objective. Where no objectives are developed to address poor performance, detail the reasons why no objective has been developed.
4. Resources: Assess and identify all the resources you think your business unit will need to implement and achieve the objectives and targets you have developed. For example, if you need to develop and run a Manual Handling Training program at Group level, you may need financial resources for development, printing, wages for training etc., you may also need staff to assist in training and admin, and some additional materials (e.g., fit balls) to assist in running your session.

PART B:

1. Once you have completed each section of the working tool, transfer any objectives, and targets you have developed into the table at the end of the working tool, as well as defining what section of the working tool they were raised against.
2. For each objective, list the specific performance Indicators and relevant actions you need to take to achieve the objective. There can be as few or as many as you like. You may have more than one performance indicator for each objective and several actions aligned to each performance indicator. The more detail you provide, the easier it will be to provide an update on your progress in achieving each performance indicator and the objective.
3. Prioritise each objective and target in terms of need/risk/impact.
4. Determine what you will do with each objective.
5. Transfer all your objectives, performance Indicators, and targets that will go into this year’s plan into form WHS & IM Management Plan (053T) or equivalent.

PART C:

1. Using WHS & IM Activities Schedule (003T) or equivalent schedule activities for the following year.

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| --- | --- | --- | --- | --- | --- |
| Area / Site: |  | Year of Plan: |  | Date: |  |

PART A: Analysis

| Key Challenges | Analysis of | Performance | Objectives, Performance Indicators and Targets | Extra Resources |
| --- | --- | --- | --- | --- |
| Reviewing Past Performance |  |  |  |  |
| Review Businesses performance against each of the objectives in last WHS & IM Management Plan  *Links to WHS & IM Policy Objectives XXXX & X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X & Strategic Direction X* | Objective 1  Performance Indicator(s)  Target(s) | Objective 1: Target Met | Objective 1  Performance Indicator(s)  Target(s) |  |
| Review Businesses performance against each of the objectives in last WHS & IM Management Plan  *Links to WHS & IM Policy Objectives XXXX & X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X & Strategic Direction X* | Objective 2  Performance Indicator(s)  Target(s) | Objective 2: Target Met | Objective 1  Performance Indicator(s)  Target(s) |  |

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| --- | --- | --- | --- |
| Data Analysis | | *Actions* | *Resources* |
| *Links to WHS & IM Policy Objectives X, X, X, & X*  *Standard X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |

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| Legal and Other Requirements |  |  |  |  |
| *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Communication and Consultation |  |  |  |  |
| Effectiveness of consultative mechanisms in place to communicate information, policies, *etc.*  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Hazards, & Risks |  |  |  |  |
| Analyse the major hazards, risks, impacts and aspects associated with the operation of the business.  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X.* |  |  |  |  |
| Health and Wellbeing |  |  |  |  |
| Review of the performance of health and wellbeing management programs  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| WHS Management System |  |  |  |  |
| Review the performance of your WHS Management system.  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Management Review |  |  |  |  |
| Conduct an analysis of the outcomes of your Management Reviews  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Training Needs |  |  |  |  |
| Identify any new training needs for your business.  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Scheduled WHS Activities |  |  |  |  |
| Analyse your business ability to conduct all scheduled WHS Activities  *Links to WHS & IM Policy Objectives X*  *Standard X & X Work Health Safety Guidelines.*  *Strategic Direction X* |  |  |  |  |
| Other Considerations |  |  |  |  |
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| 1. Training | 1. Risk Management | 1. Reporting / Communication | 1. Systems | 1. Governance |
| To ensure that appropriate health, safety and injury management training and education is provided to all workers. | To ensure a formal risk management process that identifies and evaluates workplace health and safety risks is in place and operating effectively, to eliminate or otherwise control and monitor risk in accordance with the hierarchy of control and legal requirements. | To report and review performance and provide sufficient information to support the delivery of improvement plans and include all workers in decisions affecting workplace health and safety. | To ensure the maintenance and ongoing review of the work health and safety / injury  management system occurs | To ensure governance practices have clarity, stability, and agility by establishing measurable objectives, targets, performance indicators and ongoing management review occurs. |

PART B: Summary of Objectives and Targets, and Prioritisation – *derived from analysis in Part A.*

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| --- | --- | --- | --- | --- | --- | --- |
| Date | Objective (s) | Target (s) | Performance Indicator (s) | Actions | Priority | Action |
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PART C: Activities Schedule

Using WHS & IM Activities Schedule (003T) schedule activities for the following year