



WORKFORCE PLANNING AND DEVELOPMENT
EMPLOYMENT OPPORTUNITIES PLAN



Navigating Pathways to
Workforce Excellence


WE HIRE VETERANS

workforce
development

INSTRUCTIONAL GUIDE

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1.0 Employment Opportunities Plan Background

In support of the Commonwealth's commitment to inclusion, each July 1 agencies are required to submit a formal Employment Opportunities Plan (EOP) that outlines strategies for increasing the employment of individuals with disabilities.

The Employment Opportunities Plan should highlight progress achieved towards the strategies used for expanding and increasing opportunities for individuals with disabilities, to include: internal policies and practices, recruitment efforts, interviewing criteria, and resources to accommodate applicants and workers with disabilities.

To assist agencies with this objective, and to align with other workforce planning and development initiatives, DHRM has created the Employment Opportunities Plan template. This Excel based template provides a walkthrough of how an agency can create an Employment Opportunities Plan by examining key workforce metrics, analyzing both internal and external environmental factors, and outlining strategy objectives and action items.

Using the Excel based template allows agencies to then import their Employment Opportunities Plan directly into their full Workforce Planning and Development annual plan, promoting efficiency and alignment of workforce planning and development efforts.



Interested in keeping up to date with workforce planning announcements?
All Announcements are published in the monthly [DHRM Highlights](#)

2.0 Employment Opportunities Plan Template

The Employment Opportunities Plan Template is an Excel based template and can be found on the DHRM Website.

The template provides a structured approach to creating the Employment Opportunities Plan. Though it is based in Microsoft Excel, it is not designed as a traditional workbook or worksheet. The template is organized by grouping key information on various tabs, indicated at the bottom of the template, which builds upon previous tabs.

- **Home** - The Home tab is a central place for users to navigate to the different tabs, track their progress of each step, and to see what version of the template is being used.
- **Getting Started** – The Getting Started tab reviews important features, setup, and instructions for using this template to its full potential. *It is highly encouraged for users to review this tab.*
- **Agency Profile** – The Agency Profile includes the overall agency information required to utilize the template, to include the agency name, secretariat, and agency number. An optional logo can also be added here. The Agency Profile also includes overall workforce information related to the Employment Opportunities Plan.
- **Workforce Data** – The Workforce Data tab identifies specific elements for agencies to interpret data from their current workforce that relate to their EOP.
- **Agency Strategy** – The Agency Strategy tab guides agencies through a SWOT Analysis exercise to interpret the current environment and utilize that, along with workforce data, to create an action plan, provide updates, or modify an existing plan.
- **EOP Summary** – The EOP Summary tab compiles the information from the Agency Profile, Workforce Data, and Agency Strategy tabs into a single, easy to read report.

The template also uses a series of Excel Macros, specific procedures that can automate processes, to increase the template’s functionality and ease of use. Macros must be enabled in order to use these functions. However, the template is also designed so that it can be used without Marcos if an agency wishes, but would requires some manually steps when completing specific sections. More information on the design on the template are reviewed in the “Getting Started Tab” section.

3.0 Workforce Planning Data Definitions

The Employment Opportunities Plan aligns with the Workforce Planning and Development report agencies submit annually. To further promote alignment, definitions for specific data metrics are outlined in the Workforce Planning Data Definitions document on the DHRM Website.


The Employment Opportunities Plan includes data elements defined in both the General Definitions and Employment Opportunities Plan Template sections of the data definitions document.

Please review the data definitions document for specific definitions as needed.

4.0 Tab Guides

The Employment Opportunities Plan template is divided into several tabs that house similar information. It is recommended for users to progress through the tabs from left to right, beginning with the Home Tab.

Home Tab

The Home tab is a central place for users to see a description of and navigate to the different tabs, track their progress of each step, and to see what version of the template is being used. The version number is located in the bottom right corner of the home tab, and is represented by the  icon.

Each of the tab names, highlighted in blue, are hyperlinks to the tabs. Click on any of the names to navigate to the respective tab.

To begin using the template, click on the “Getting Started” Tab name in blue.



The screenshot shows the 'WORKFORCE PLANNING AND DEVELOPMENT EMPLOYMENT OPPORTUNITIES PLAN' interface. It features a navigation menu on the left with four tabs: 'GETTING STARTED', 'AGENCY PROFILE', 'EOP WORKFORCE DATA & AGENCY STRATEGY', and 'EOP SUMMARY'. Each tab has a corresponding progress bar above it, all showing 0% completion. The 'GETTING STARTED' tab is highlighted in blue and circled in red. A red arrow points to the 'GETTING STARTED' link in the navigation menu with the text 'Blue Name of the Tab is a Link to the Respective Tab'. Another red arrow points to the 'EOP SUMMARY' progress bar with the text 'Progress bar Shows Step Completion'. A third red arrow points to the version number 'Version 2022.1' in the bottom right corner with the text 'Version Number of the Template'. The 'GETTING STARTED' tab content includes a red box with the text 'It is highly recommended first time users start here.' and a document icon with the text 'Users can also import data from other tools on the Getting Started Tab.'

Getting Started Tab

The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Employment Opportunities Plan template. Though it is not required to review, **it is highly recommended users spend time to review this information.**

The tab begins with a quick overview and description of the contents.

Step 1: Review Overall Setup

The Getting Started tab provides a breakdown of the overall setup for the remaining tabs. Each tab follows the general setup of having the step number and title on the left hand side, a set of instructions underneath, and the required data to be entered labeled (either above or to the left).

Cells with a yellow background indicate required information to be entered. Once all the required information is entered, the step indicator will change from **Incomplete** to **Complete**.

Click to view help
(NOTE: cannot edit file while help is open)

Step Number and Title

Complete / Incomplete Indicator for Step

Complete

Instructions on how to complete the step

INSTRUCTIONS: Please enter the total number classified of employees and employees with disabilities for each FY in the yellow boxes. Please also enter the total employees with disabilities for each FY who are leaders (defined as individuals with 2 or more direct reports) and who are executives (defined as the agency head and their direct reports). Please enter the same information for Veterans with Disabilities at the Agency.

Description of what data to enter in the cell

Workforce Information

	FY21	FY22
Total Classified Employees at the Agency	10	10



Description of what data to enter in the cell






Cell to enter data (click on cell to enter data)

Some steps may include sub steps, indicated by the step number and letters slightly indented from the left.

Step 2: Review Important Features of This Tool

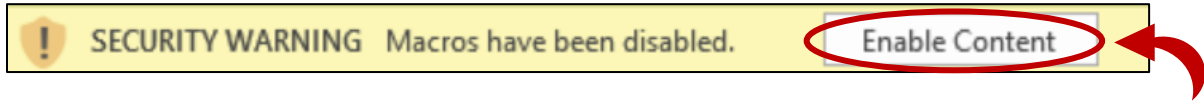
The Getting Started tab provides a breakdown of the important features of the template, used to assist with entering and interpreting workforce information. Below are descriptions of the template's key features.

	<p style="text-align: center;">USE OF EXCEL MACROS</p> <p>This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. NOTE: Excel Macros must be enable to use them. The template can also be used without the Macros, but will require some manual edits.</p>
	<p style="text-align: center;">EASY FILE NAVIGATION</p> <p>Each Excel Worksheet, or tab, houses related information which is compiled together into a single report. Links to each tab are frozen at the top of each tab to easily navigate between them.</p>

	<p style="text-align: center;">COLOR CODED DATA ENTRY</p> <p>Colors are used to identify what data should be entered and where. Yellow indicates required information. Green indicates optional information, and Gray indicates information is not required.</p>
	<p style="text-align: center;">BUILT-IN HELP FEATURES</p> <p>This template has a built in help feature. Click on the question mark in the blue circle to open a window with additional information, definitions, and steps to complete. NOTE: Macros must be enabled. The template cannot be edited while help windows are open.</p>
<p style="text-align: center;">COMPLETE INCOMPLETE</p>	<p style="text-align: center;">PROGRESS INDICATORS</p> <p>The home tab provides progress indicators for each step of the template. Each tab also provides progress indicators for each step or sub-step, which show if the step is complete or incomplete.</p>
	<p style="text-align: center;">DATA IMPORT</p> <p>This template is part of a suite of integrated workforce planning and development tools. Using these tools allows for information to easily be imported from one tool to the next. Data cannot be imported unless using a specific template, provided by DHRM upon request. NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</p>
	<p style="text-align: center;">EASILY REVIEW PRIOR INFORMATION</p> <p>This template, if the prior year information as imported, has select areas of the template that allow for easy viewing of the prior year responses, noted by the magnifying glass icon in the blue call out bubble. NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</p>
	<p style="text-align: center;">TEMPLATE VERSIONS</p> <p>As we continue to enhance this template, integrate it with other elements of workforce planning and development, or as changes to any mandates or guidance occurs, new versions of this template may be released. The version number is located on the Home tab in the bottom right corner.</p> <p>It is important to be using the most up to date version, which will be noted on the DHRM Workforce Planning Website. As new versions are released, the prior version data can be imported so no progress is lost.</p>

(Optional) Step 3: Enable Macros to Utilize Full Functionality

To ensure Macros are enabled, when first opening the file or anytime the filename changes, you will see a “Security Warning” at the top (shown in the picture below) indicating Macros have been disabled. Click the “Enable Content” button to enable macros for the file.



Click to Enable Macros

(Optional) Step 4: Import Data from Other Sources

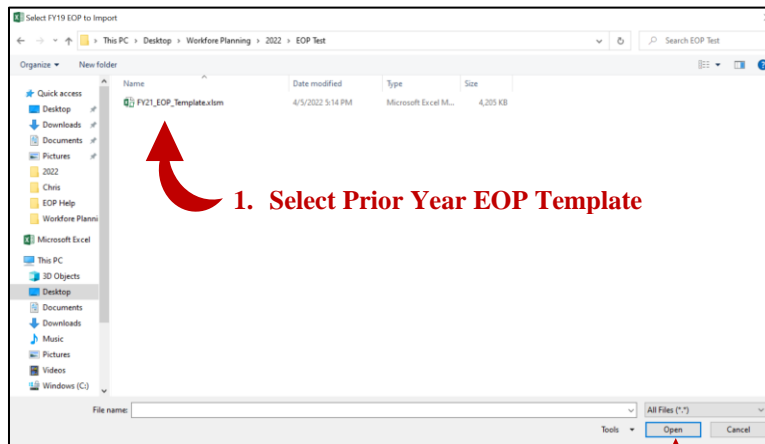
For efficiency and integration to other workforce planning and development tools, data from the Prior Year Employment Opportunities Plan can be imported. Imported data, shown in the table below, will automatically enter the information into the respective cells. Agencies are encouraged to still review the information for accuracy.

Agency Profile	Workforce Data	Agency Strategy
Agency Name Overall Workforce Data	Hiring Information Applicant Information Internal Promotions Internal Transfers Voluntary Separations External Transfers	SWOT Analysis Response (view only) Strategy Objectives and Action Items

To import the data, click on the Import Data Icon  for the tool the data is imported from.



This will open the standard “Open File” dialog box. Simply locate and select the Prior Fiscal Year EOP template and click “Open”. (Shown in the picture below).



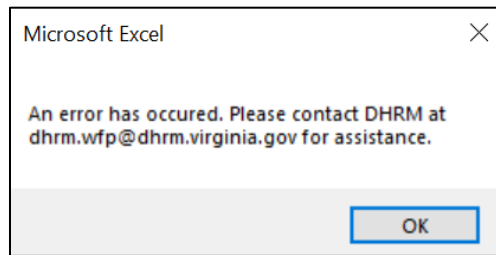
1. Select Prior Year EOP Template

2. Click Open

If the data is imported successfully, the template will indicate the date and time the data was imported (shown in the picture below).

Last Uploaded Date and Time	Upload Status
4/12/2022 14:55	Upload Complete 

If the data import was unsuccessful, the dialog box (in the picture below) will indicate an error occurred and to contact DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov.



Agency Profile Tab

The Agency Profile Tab of the Employment Opportunities Plan is a condensed version of the full Workforce Planning and Development Agency Profile. It includes some general information, such as the agency name secretariat, agency number, and overall workforce data essential to the Employment Opportunities Plan.

Step 1: Enter Agency Information

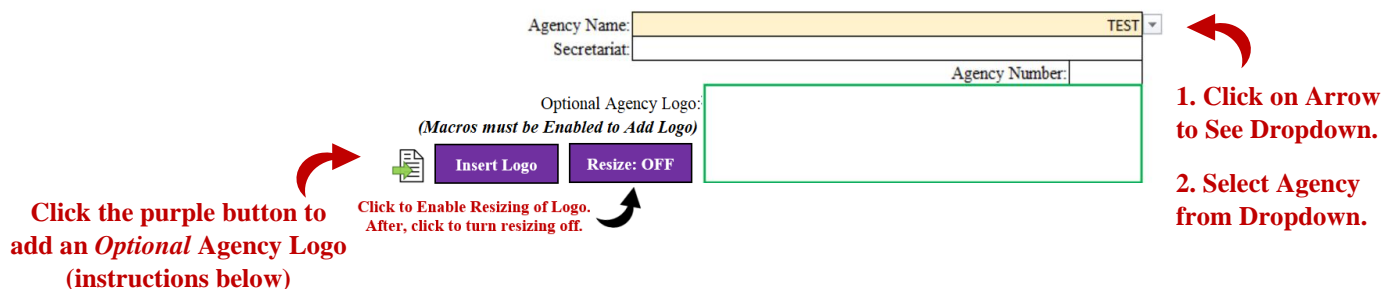
To complete step one, entering agency information, select the agency name from the drop down menu in the yellow box (shown in the picture below). To show the dropdown arrow, click in the yellow cell. The secretariat and agency number will be displayed automatically

An optional logo can be added by clicking the "Insert Logo" purple button, selecting the logo picture file, and then resizing the image to be within the green outlined box.

Step 1: Enter Agency Information

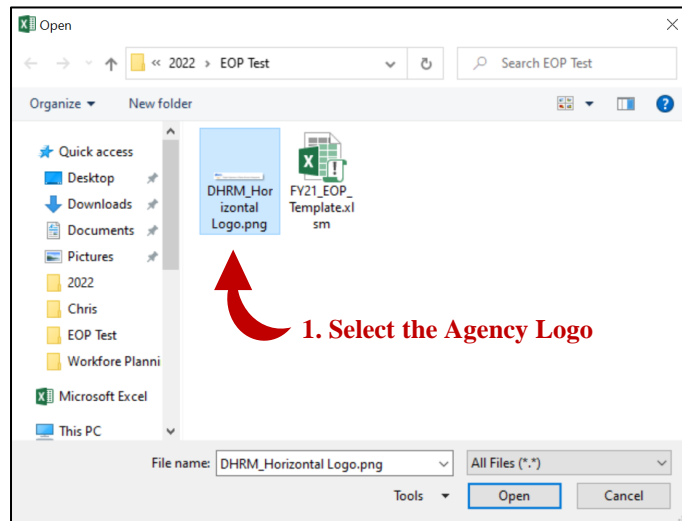
Complete

INSTRUCTIONS: Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can added by clicking the "insert logo" button and resizing the picture to be in the box with a green outline.



The screenshot shows the "Step 1: Enter Agency Information" form. It includes fields for "Agency Name" (a yellow dropdown menu with "TEST" selected), "Secretariat", and "Agency Number". Below these is an "Optional Agency Logo" section with a green outline, containing "Insert Logo" and "Resize: OFF" buttons. Red arrows and text provide instructions: "1. Click on Arrow to See Dropdown." (pointing to the dropdown arrow), "2. Select Agency from Dropdown." (pointing to the dropdown menu), "Click the purple button to add an Optional Agency Logo (instructions below)" (pointing to the "Insert Logo" button), and "Click to Enable Resizing of Logo. After, click to turn resizing off." (pointing to the "Resize: OFF" button).

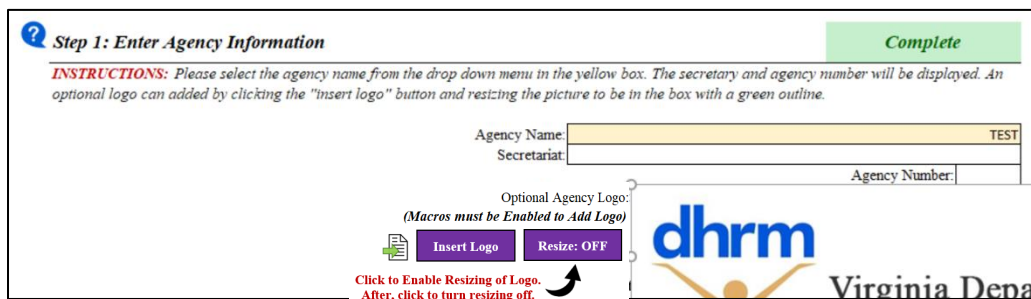
To add an *optional* Agency Logo, click on the purple button to open the standard “Open File” dialog box. Simply locate and select the Agency Logo and click the “Open” button. **NOTE: The Agency Logo must be a picture file.**



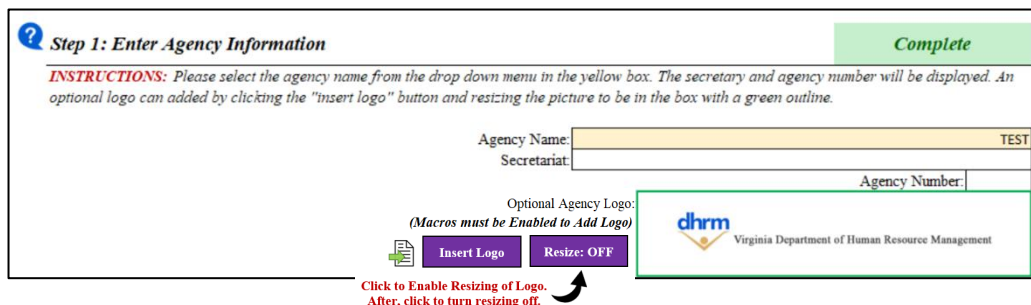
2. Click Open

Once added, resize the logo to be within the green outlined box (shown in the picture below) by clicking the “Resize: OFF” purple button. After the Image is resized to be within the green box, click the “Resize: ON” button.

Before



After



Step 2: Identify if the Summary is for the Fiscal Year Submission or as a Snapshot in Time.

To complete step 2, select whether the agency is using the template to complete the mandated fiscal year employment opportunities plan or to take a workforce snapshot from the dropdown menu in the first yellow box.

Next, enter the date of the end of the fiscal year (if using the template for the fiscal year submission) or the date of the snapshot.

Is this for the Fiscal Year EOP or a Snapshot of the Workforce? **1. Select the type from the dropdown menu.**

Date: **2. Enter the date (MM/DD/YYYY) format.**

Step 3: Enter Classified Workforce Information

To complete step 2, enter the total number of classified employee and total number of employees with disabilities for each fiscal year in the yellow boxes below outlined in red (shown below). To enter the data, click on the respective cell and then enter the number.

Click for Help if needed

After, click to turn resizing on.

Step 2: Enter Classified Employee Workforce Information Incomplete

INSTRUCTIONS: Please enter the total number classified of employees and employees with disabilities for each FY in the yellow boxes. Please also enter the total employees with disabilities for each FY who are leaders (defined as individuals with 2 or more direct reports) and who are executives (defined as the agency head and their direct reports). Please enter the same information for Veterans with Disabilities at the Agency.

	Workforce Information		
	FY21	FY22	FY23
Total Classified Employees at the Agency			
Total Classified Employees with Disabilities at the Agency			
Total Classified Employees with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Employees with Disabilities at the Agency who are Executives			
Total Classified Veterans with Disabilities at the Agency			
Total Classified Veterans with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Veterans with Disabilities at the Agency who are Executives			

1. Enter the total number of classified employees and total number of classified employees with disabilities

Next, enter the total number of employees with disabilities for each fiscal year who are leaders (defined as individuals with 2 or more direct reports) and who are executives (defined as the agency head and their direct reports) in the respective yellow boxes outlined in red.

After, click to turn resizing on.

Step 2: Enter Classified Employee Workforce Information Incomplete

INSTRUCTIONS: Please enter the total number classified of employees and employees with disabilities for each FY in the yellow boxes. Please also enter the total employees with disabilities for each FY who are leaders (defined as individuals with 2 or more direct reports) and who are executives (defined as the agency head and their direct reports). Please enter the same information for Veterans with Disabilities at the Agency.

	Workforce Information		
	FY21	FY22	FY23
Total Classified Employees at the Agency			
Total Classified Employees with Disabilities at the Agency			
Total Classified Employees with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Employees with Disabilities at the Agency who are Executives			
Total Classified Veterans with Disabilities at the Agency			
Total Classified Veterans with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Veterans with Disabilities at the Agency who are Executives			

2. Enter the total number of classified employees with disabilities who are leaders or executives

Next, enter the number of classified veterans with disabilities, veterans with disabilities who are leaders and those who are executives for each fiscal year in the yellow boxes outlined in red below.

After, click to turn resizing on.



Step 2: Enter Classified Employee Workforce Information

Incomplete

INSTRUCTIONS: Please enter the total number classified of employees and employees with disabilities for each FY in the yellow boxes. Please also enter the total employees with disabilities for each FY who are leaders (defined as individuals with 2 or more direct reports) and who are executives (defined as the agency head and their direct reports). Please enter the same information for Veterans with Disabilities at the Agency.

	<u>Workforce Information</u>		
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Classified Employees at the Agency			
Total Classified Employees with Disabilities at the Agency			
Total Classified Employees with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Employees with Disabilities at the Agency who are Executives			
Total Classified Veterans with Disabilities at the Agency			
Total Classified Veterans with Disabilities who are Leaders/Supervisors (2 or more direct reports)			
Total Classified Veterans with Disabilities at the Agency who are Executives			



3. Enter the total number of classified veterans with disabilities, those who are leaders and those who are executives

Workforce Data Tab

The Workforce Data tab guides agencies by identifying the key metrics included in the Employment Opportunities Plan, specifically recruitment and retention information. Data entered here feeds into a brief Workforce Insights tool on the Agency Strategy tab and into the overall EOP Summary.

Data entered into the Workforce Data tab should reflect Classified Employees only for July 1st through May 31st of the reporting fiscal year.

Step 1: Enter Classified Employee Recruitment Information

To complete step 1, enter the classified hiring and applicant information for the agency in the yellow boxes outlined in red for each fiscal year. These include the total classified hires, total classified applicants, and a breakdown of classified hires and applicants who were employees with disabilities (shown in the picture below).

Click for Help if needed

Step 1: Enter Classified Employee Recruitment Information Incomplete

INSTRUCTIONS: Please enter the classified hiring and applicant information for the agency in the yellow boxes, to include the total hires, total applicants, and a breakdown of hires and applications for employees with disabilities. Please also enter the number of employees with disabilities that were hired to and applied to a leader/supervisor role (defined as individuals with 2 or more direct reports) and executive roles (defined as the agency head and their direct reports).

	Hiring Information		
	FY21	FY22	FY23
Total Classified Hires at the Agency			
Total Classified Hires who were Employees with Disabilities			
Total Classified Employees with Disabilities hired to Leader/Supervisor Role (2 or more direct reports)			
Total Classified Employees with Disabilities hired to Executive Role			

1. Enter the total classified hires and total classified hires of employees with disabilities for each FY

	Applicant Information		
	FY21	FY22	FY23
Total Classified Applicants to Positions at the Agency			
Total Classified Applicants who were Employees with Disabilities			
Total Classified Employees with Disabilities that applied for a Leader/Supervisor Role (2 or more direct reports)			
Total Classified Employees with Disabilities that applied for an Executive Role			

2. Enter the total classified applicants and total classified applicants of employees with disabilities for each FY

Agencies should also enter the total number of employees with disabilities hired to leader or supervisory roles (defined as individuals with 2 or more direct reports) and executive roles (defined as the agency head and their direct reports), as well as applicants with disabilities to both leader/supervisory roles and executive roles, for each fiscal year in the yellow boxes outlined in red (shown in the picture above).

Step 2: Enter Alternative Hiring Process (AHP) Information

To complete step 2, enter the specific information regarding the alternative hiring process, which launched in April 2022, to include the total number of individuals who applied using this process, the total hired from this process, and the total employees of those hired with this process who transitioned to a classified position in the yellow boxes outlined in red (shown below).

Step 2: Enter Alternative Hiring Process Information

Incomplete

INSTRUCTIONS: Please enter the following information regarding the alternative hiring process, launched in April of 2022, to include the total number of individuals who applied using this process, the total hired from this process, and the total employees of those hired with this process who transitioned to a classified position.

Click for Help if needed

	Alternative Hiring Information		
	FY21	FY22	FY23
Total Applicants that used the Alternative Hiring Process			
Total Individuals Hired from Alternative Hiring Process			
Total Employees Hired through Alternative Hiring Process that transitioned to a Classified Employee			

1. Enter the total applicants and total hires from the alternative hiring process. Enter the total number of employees hired with AHP who transitioned to a classified position

Step 3: Enter Classified Employee Retention Information

To complete step 3, enter the classified retention information in the yellow boxes outlined in red for each of the respective categories: agency years of service, internal promotions, internal transfers, voluntary separations, and external transfers (to other state agencies). [See the Workforce Planning Data Definitions for definitions of each.](#)

To enter the agency years of service, enter the average years of service for classified employees and classified employees with disabilities. Then, enter the average years of service for employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports) and those who are executives (defined as the agency head and direct reports).

Step 3: Enter Classified Employee Retention Information

Incomplete

INSTRUCTIONS: Please enter the classified retention information in the yellow boxes, to include the average years of service, number of internal promotions, number of internal transfers, number of voluntary separations, and number of external transfers to other state agencies for classified employees and for employees with disabilities. Please also enter the number employees with disabilities who are in a leader/supervisor role (defined as individuals with 2 or more direct reports) and for employees with disabilities in executive roles (defined as the agency head and their direct reports) for each of these information areas.

Click for Help if needed

	Agency Service Information		
	FY21	FY22	FY23
Average Years of Service at the Agency for Classified Employees			
Average Years of Service for Classified Employees with Disabilities			
Average Years of Service for Classified Employees with Disabilities in a Leader/Supervisor Role (2 or more direct reports)			
Average Years of Service for Classified Employees with Disabilities in an Executive Role			

1. Enter the average years of service for classified employees, employees with disabilities, and those who are leaders and executives for each FY

Next, enter the number of internal promotions in the yellow boxes outlined in red below for classified employees and classified employees with disabilities. Then, enter the number of internal promotions of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports) and those who are executives (defined as the agency head and direct reports).

	Internal Promotions Information		
	FY21	FY22	FY23
Total Number of Internal Promotions of Classified Employees at the Agency			
Total Classified Internal Promotions who were Employees with Disabilities			
Total Classified Internal Promotions who were Employees with Disabilities to a Leader/Supervisor Role (2 or more direct reports)			
Total Classified Internal Promotions who were Employees with Disabilities to an Executive Role			

2. Enter the internal promotions for classified employees, employees with disabilities, and those who are leaders and executives for each FY

Next, enter the number of internal transfers in the yellow boxes outlined in red below for classified employees and classified employees with disabilities. Then, enter the number of internal transfers of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports) and those who are executives (defined as the agency head and direct reports).

<i>Internal Transfer Information</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Number of Internal Transfers of Classified Employees at the Agency			
Total Classified Internal Transfers who were Employees with Disabilities			
Total Classified Internal Transfers who were Employees with Disabilities to a Leader/Supervisor Role (2 or more direct reports)			
Total Classified Internal Transfers who were Employees with Disabilities to an Executive Role			

3. Enter the internal transfers for classified employees, employees with disabilities, and those who are leaders and executives for each FY

Next, enter the voluntary separations in the yellow boxes outlined in red below for classified employees and classified employees with disabilities. Then, enter the number of voluntary separations of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports) and those who are executives (defined as the agency head and direct reports).

<i>Voluntary Separations Information</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Number of Voluntary Separations of Classified Employees at the Agency			
Total Classified Voluntary Separations who were Employees with Disabilities			
Total Classified Voluntary Separations who were Employees with Disabilities to a Leader/Supervisor Role (2 or more direct reports)			
Total Classified Voluntary Separations who were Employees with Disabilities to an Executive Role			

4. Enter the voluntary separations for classified employees, employees with disabilities, and those who are leaders and executives for each FY

Next, enter the external transfers (to other state agencies) for classified employees and classified employees with disabilities in the yellow boxes outlined in red below. Then, enter the number of external transfers of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports) and those who are executives (defined as the agency head and direct reports).

<i>External Transfers (to other State Agencies) Information</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Number of External Transfers of Classified Employees at the Agency			
Total Classified External Transfers who were Employees with Disabilities			
Total Classified External Transfers who were Employees with Disabilities to a Leader/Supervisor Role (2 or more direct reports)			
Total Classified External Transfers who were Employees with Disabilities to an Executive Role			

5. Enter the external transfers for classified employees, employees with disabilities, and those who are leaders and executives for each FY

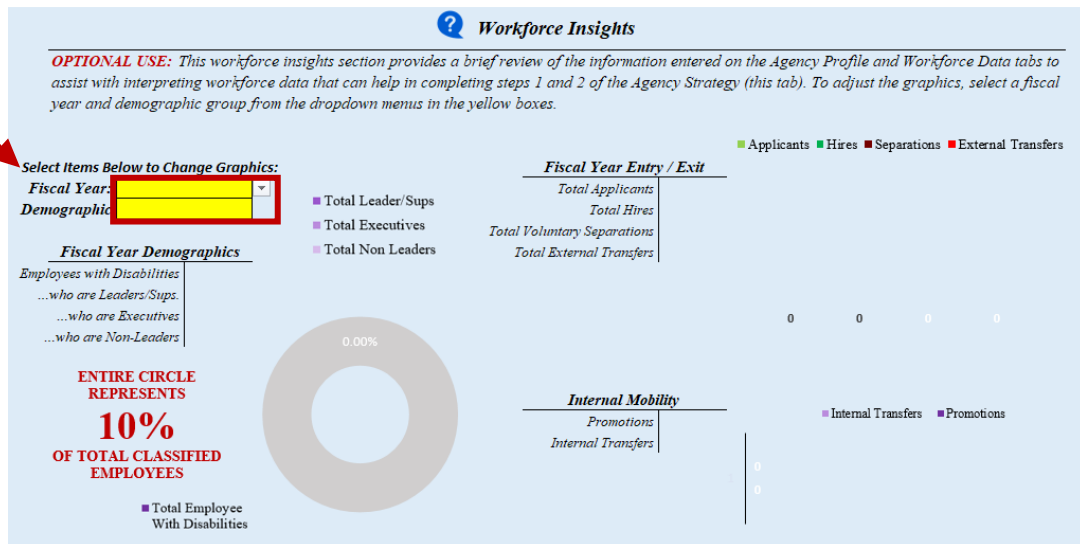
Agency Strategy Tab

The Agency Strategy tab first presents a quick analysis of the workforce data from the Agency Profile and the Workforce Data tab in the *Workforce Insights* section. This *optional* section can be used to assist with completing the Agency Strategy Tab (conducting the SWOT Analysis and creating the Strategic Action Plan).

Optional – Review Workforce Insights Section

The workforce insights section provides a brief review of the information entered on the Agency Profile and Workforce Data tabs to assist with completing steps 1 and 2 of the Agency Strategy tab. To adjust the graphics, click in the first yellow box labeled Fiscal Year and then click the gray down arrow to select a fiscal year. Repeat this for the demographic group.

Select a Fiscal Year and Demographic Group from the Dropdown Menus using the arrow in the gray box



After Fiscal Year and Demographic Data is selected:

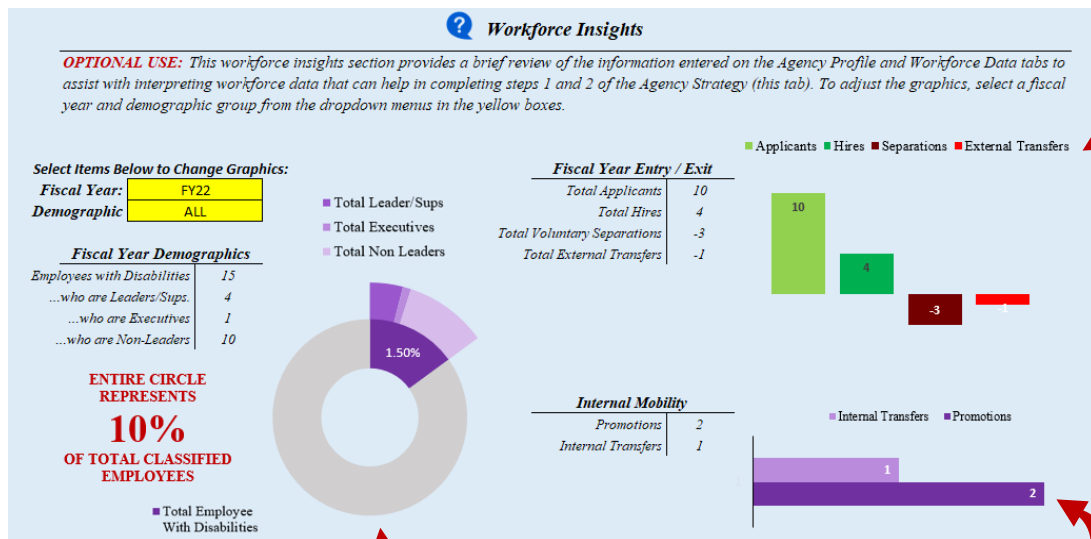


Chart to show overall percentage and demographic group breakdown of employees with disabilities

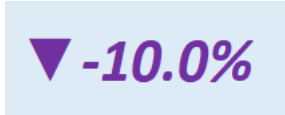
Chart to show internal mobility of employees with disabilities (promotions and internal transfers)

Chart to show agency entry (applicants and hires) and exits (vol. separations and external transfers) of employees with disabilities

The workforce insights section also displays key metrics related to the employment of individuals with disabilities and their change to the prior year. **NOTE: These metrics reflect classified employees only.**

- **Hire Rate:** the total number of hires of individuals with disabilities divided by the total number of employees.
- **Candidate Hire Rate:** the total number of hires of individuals with disabilities divided by the total number of applicants.
- **Internal Mobility Rate:** the total number of internal promotions and transfers of individuals with disabilities divided by the total number of employees.
- **Vol. Separation Rate:** the total number of external transfers and voluntary separations of individuals with disabilities divided by the total number of employees.

Changes to each metric from the prior year are indicated by arrow icons and the percent change (shown in the picture below).



▲	Indicates an increase from the prior year.
▼	Indicates a decrease from the prior year.
◀ ▶	Indicates no change from the prior year.

Step 1: Complete a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis for the Agency Related to the Employment of Individuals with Disabilities

A SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) is one of many tools organizations can utilize to reflect on their internal and external environments. See below for a description of each area of the analysis and some potential examples or items to review for each.

Strengths	Weaknesses	Opportunities	Threats
Strengths are elements INTERNAL to the Agency (within the control of the Agency) that ENHANCE an Agency’s ability to achieve a goal	Weaknesses are elements INTERNAL to the Agency (within the control of the Agency) that INHIBIT an Agency’s ability to achieve a goal	Opportunities are elements EXTERNAL to the Agency (being out of the control of the Agency) that ENHANCE an Agency’s ability to achieve a goal	Threats are elements EXTERNAL to the Agency (being out of the control of the Agency) that INHIBIT an Agency’s ability to achieve a goal
Some Examples Include: Best Practices Successful Initiatives Access to Talent or Demographics Internal Expertise Policies or Practices	Some Examples Include: Policies or Procedures Internal Processes Limited Positions Funding Sources	Some Examples Include: Partnerships with Other Organizations Local Workforce Demographic Trends Expertise available Locally Funding Sources	Some Examples Include: Limited Access to Organizations or Expertise Local Workforce Demographic Trends Funding Sources

To complete the SWOT Analysis, enter a brief, high level description of the items for each respective category (recruitment, retention, engagement, and development) in the yellow boxes outlined in red for Agency Strengths, Weaknesses, Opportunities, and Threats Section. Use the checkbox underneath to indicate there is nothing to enter.

Step 1(a): Enter Agency Strengths

Incomplete

Strengths are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **ENHANCE** an Agency's ability to recruit, retain, engage, and/or develop employees with disabilities.

1. Enter a brief, high level, description of Strengths (pertaining to the employment of individuals with disabilities) for each of the 4 categories

Recruitment	Retention	Engagement	Learning / Development
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.

Click the checkbox if there are no items to enter

Step 1(b): Enter Agency Weaknesses

Incomplete

Weaknesses are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **INHIBIT** an Agency's ability to recruit, retain, engage, and/or develop employees with disabilities.

2. Enter a brief, high level, description of Weaknesses (pertaining to the employment of individuals with disabilities) for each of the 4 categories

Recruitment	Retention	Engagement	Learning / Development
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.

Click the checkbox if there are no items to enter

Step 1(c): Enter Agency Opportunities

Incomplete

Opportunities are elements **EXTERNAL** to the Agency (defined as being out of the control of the Agency) that may **ENHANCE** an Agency's ability to recruit, retain, engage, and/or develop employees with disabilities.

3. Enter a brief, high level, description of Opportunities (pertaining to the employment of individuals with disabilities) for each of the 4 categories

Recruitment	Retention	Engagement	Learning / Development
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.

Click the checkbox if there are no items to enter

Step 1(d): Enter Agency Threats

Incomplete

Threats are elements **EXTERNAL** to the Agency (defined as being out of the control of the Agency) that may **INHIBIT** an Agency's ability to recruit, retain, engage, and/or develop employees with disabilities.

4. Enter a brief, high level, description of Threats (pertaining to the employment of individuals with disabilities) for each of the 4 categories

Recruitment	Retention	Engagement	Learning / Development
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.

Click the checkbox if there are no items to enter

To view prior year responses to the SWOT Analysis, click the magnifying glass icon (shown in the picture below) to display the responses from the prior year. **NOTE: Prior responses will only be displayed in the prior year employment opportunities plan is imported.**


SHOW
Prior Year
Strengths
Click the magnifying glass icon to show prior year responses.

Recruitment	Retention	Engagement	Learning / Development
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.

The prior year responses can be hidden again by clicking the same icon.


HIDE
Prior Year
Strengths
Click the magnifying glass icon to hide prior year responses.

Recruitment	Retention	Engagement	Learning / Development
<i>The agency does an excellent job of advertising positions and including inclusive language in its job postings.</i>		<i>The agency does an excellent job of working with DARS to</i>	
<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.	<input type="checkbox"/> Check box if there is nothing to enter for this category.


Step 2: Create an Agency Strategy

Using both the optional Workforce Insights section and SWOT Analysis, create a strategic action plan for addressing the recruitment, retention, engagement, and development of employees with disabilities.

Each item should include an overall objective statement and then specific actions items to take in order to fulfill that objective. A total of 5 objectives can be added per plan and a total of 5 action items can be added per objective.

If Not Using the Excel Macros, Skip to Step 2(a)

To add an objective, click the purple “Add Objective Button”, this will show the objective description box.

 **Step 2: Create an Agency Strategy (If not using Macros, go to Step 2(a))** Incomplete

INSTRUCTIONS: Using both the Workforce Insights and SWOT Analysis, please create a strategic action plan addressing the recruitment, retention, engagement and development of employees with disabilities. Each item should include an overall objective statement and then specific action items to take in order to fulfill that objective. Objectives can be added by clicking the "Add Objective" button, for a total of 5 overall objectives per plan.

.....

Click for Help if needed

 Remove Last Objective


1. Click the “Add Objective” to see Objective Entry Box (below)

Objective Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, or existing actions can be modified, for a total of 5 action items per each objective. **Action items should describe what the action is and how it will be measured.** A brief summary of progress can be provided by clicking the "Add Progress Update" button.

Overall Objective Statement

2. Enter the Objective Statement (brief) into the yellow box.


 Remove Last Item Add Progress Update

3. Click the “Add Action Item” button to see the Action Item Entry box

Objective Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, or existing actions can be modified, for a total of 5 action items per each objective. **Action items should describe what the action is and how it will be measured.** A brief summary of progress can be provided by clicking the "Add Progress Update" button.

Overall Objective Statement

 Remove Last Item Add Progress Update

Action Item

4. Enter the Action Item in the Yellow Box

5. Click the “Add Action Item” button again to add up to 4 more Action Items (Shown Below)

Action items can be removed by clicking the “Remove Last Item” purple button. This will remove the last action item that was added.

Objective

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, or existing actions can be modified, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured. A brief summary of progress can be provided by clicking the "Add Progress Update" button.

Overall Objective Statement

Add Action Item

Remove Last Item

Add Progress Update

Click to Remove Last Added Action Item

Action Item

Action Item

Action Item

Action Item

Action Item

If the prior year employment opportunities plan was imported, the prior year objectives and action items will be shown. These items can be modified, new items added, or a progress update provided.

Items being modified will show a “Modified Indicator” (shown below).

Overall Objective Statement

◀MODIFIED▶

Modified Test

New items will show a “New” Indicator.

Overall Objective Statement

◀NEW▶

Test

To add a progress update, click the “Add Progress Update” purple button and enter the update, a few sentences, in the yellow box (shown below).

Objective

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, or existing actions can be modified, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured. A brief summary of progress can be provided by clicking the "Add Progress Update" button.

Overall Objective Statement

Add Action Item

Remove Last Item

Add Progress Update

1. Click the “Add Progress Update” to see Update Entry Box (below)



Date of Update
Objective Progress Summary

Enter the date of the update and a summary of the progress



1. Click the "Remove Progress Update" to remove the update.

These steps should be repeated for any additional objectives (up to 5) added to the strategic action plan. In the event an objective should be removed, click the "Remove Objective" purple button. This will remove the objective and all action items.



(Optional) Step 2(a): Create an Agency Strategy without Macros

If the purple buttons were used to enter the Strategic Action Plan, this step can be skipped.

In the event Macros are not being used, the Strategic Action Plan can be entered by first entering the total number of objectives and total number of action items for each objective in the green boxes.

(Optional) Step 2(a): Enter Objectives & Action Items if Not Using Macros

If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.

Total Objectives	
Total Objective 1 Action Items	
Total Objective 2 Action Items	
Total Objective 3 Action Items	
Total Objective 4 Action Items	
Total Objective 5 Action Items	

1. Enter the Total Number of Objectives in the Strategic Plan

Click to Remove Last Objective Added (will also remove all action items for that objective)

(Optional) Step 2(a): Enter Objectives & Action Items if Not Using Macros

If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.

Total Objectives	4
Total Objective 1 Action Items	1
Total Objective 2 Action Items	2
Total Objective 3 Action Items	5
Total Objective 4 Action Items	3
Total Objective 5 Action Items	

2. Enter the Total Number of Action Items for Each Objective

NOTE: If there is no objective, the box will be grayed out and can be left empty

If any updates are being added to any of the objectives, select "yes" from the dropdown next to the objective the update is for (shown in the picture below).

Provide Update for Objective 1	Yes
Provide Update for Objective 2	
Provide Update for Objective 3	
Provide Update for Objective 4	
Provide Update for Objective 5	

3. Select "Yes" if a progress summary is included with the objective.

After the numbers are entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

The screenshot shows a software interface with several navigation tabs: "TO HOME TAB", "TO GETTING STARTED", "TO AGENCY PROFILE", "TO WORKFORCE DATA", "AGENCY STRATEGY (CURRENT TAB)", and "TO EOP SUMMARY". Below the tabs is the instruction text and the table from Step 2(a). A red circle highlights the filter icon in cell W1.

4. Click the filter Icon to show filter menu

5. Verify "0" is unchecked

6. Click Ok

Scroll up on the sheet to see the entry boxes for all objective and action items. The objective and action item numbers can be changed using this same process. If the objective number decreases, ensure all grayed out cells for the action items are empty, otherwise the data will not filter correctly.

(Optional) Step 3: Check Spelling

The template allows for the spell check feature to be used on this tab, however, Macros must be enable to use this feature. Click the "Spell Check This Tab" purple button, which will launch the Excel spell check function.

(Optional) Step 3: Check Spelling (Macros must be enabled to use. See "Getting Started" for more information.)

INSTRUCTIONS: To check the spelling of items on this tab, please click the purple "Spell Check This Tab" button below. Correcting the spelling on this tab will ensure the report is correct as well.

1. Click Spell Check This Tab button to launch the Check Spelling function

EOP Summary Tab

The Employment Opportunity Summary Tab compiles the information from the previous tabs into a single report. It begins with an overall summary and then displays graphics for key workforce metrics, the SWOT Analysis graphic (which can be omitted) and presents the Agency Strategy objectives and action items.

At the top and bottom of the tab are indicators to show if the report is up to date or needs to be refreshed. Anytime items are added or removed from the agency strategic action plan, the report will need to be refreshed.

EOP SUMMARY

The Employment Opportunity Summary compiles the information from the previous tabs into a single report. It begins with an overall summary and then displays graphics for key workforce metrics, the SWOT analysis graphic (which can be omitted) and presents the agency strategy objectives and action items. After the report is completed, it can be exported as a PDF to be signed either electronically or by hand. Procedures to submit the report are detailed at the bottom of this tab.

REPORT NEEDS TO BE REFRESHED. CLICK THE REFRESH BUTTON TO THE RIGHT.

Click to Refresh Report

Click for Help if needed

If the report needs to be refreshed, click the purple "Click to Refresh Report" button

If not using Macros, the report will need to be refreshed manually. Go to cell "Z1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

The indicator will change to "Report is up to date" after refreshing the report.

EOP SUMMARY

The Employment Opportunity Summary compiles the information from the previous tabs into a single report. It begins with an overall summary and then displays graphics for key workforce metrics, the SWOT analysis graphic (which can be omitted) and presents the agency strategy objectives and action items. After the report is completed, it can be exported as a PDF to be signed either electronically or by hand. Procedures to submit the report are detailed at the bottom of this tab.

REPORT IS UP TO DATE.

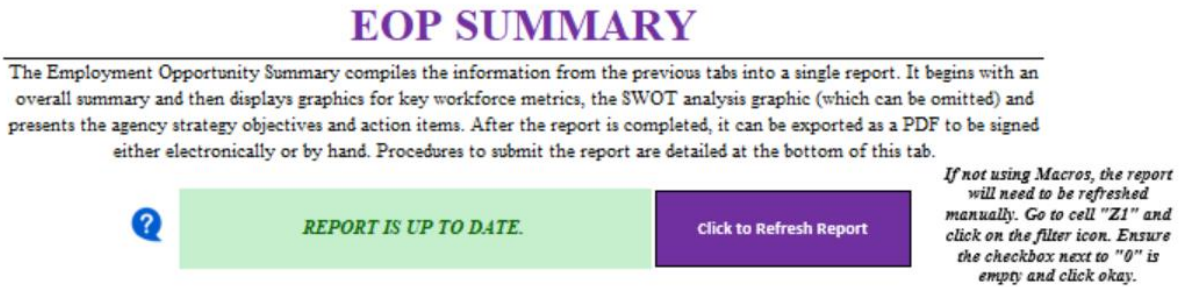
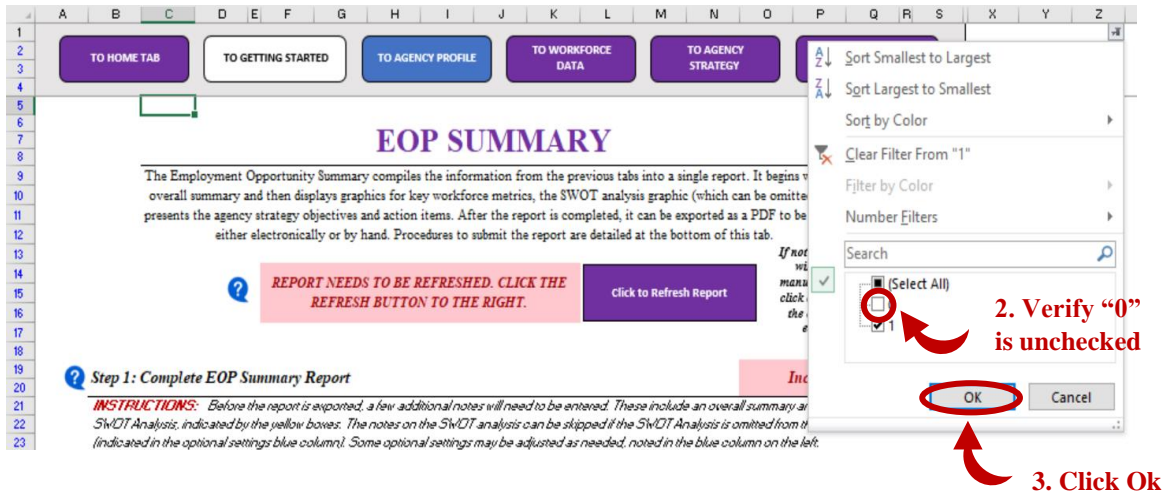
Click to Refresh Report

If not using Macros, the report will need to be refreshed manually. Go to cell "Z1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

(Optional) Refresh Report without Macros

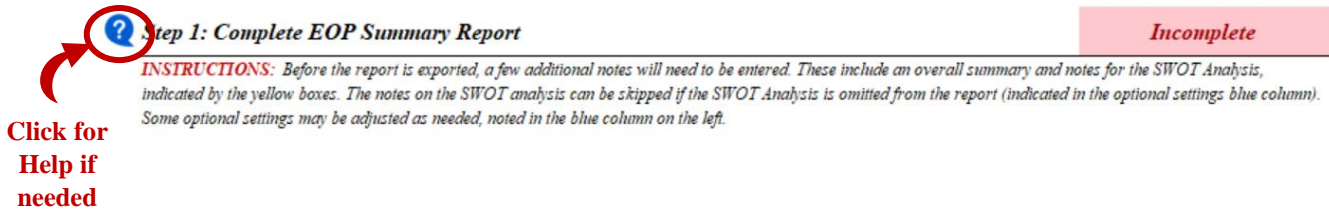
If Macros are not used, the report can be refreshed manually by clicking the filter icon in cell "Z1" to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet. This will change the indicator to say "Report is up to Date".

1. Click the filter icon to show filter menu



Step 1: Complete EOP Summary

Before the report is exported, a few additional notes will need to be entered, to include an overall summary and notes for the SWOT Analysis, all of which are indicated by yellow boxes outlined in red below.



Step 1(a): Enter Report Summary

In the first section of the report, enter a summary in the yellow box outlined in red of key findings, prior actions to promote the employment of individuals with disabilities and their impact, and a brief discussion of the further actions that will be taken. The background will change to white once anything is entered into the cell.

<i>See Below for Optional Settings for this Report</i>	TEST <i>Agency Number:</i> _____

1. Enter the Report Summary in the yellow box.

Step 1(b): Enter Brief Overview and Notes for SWOT Analysis

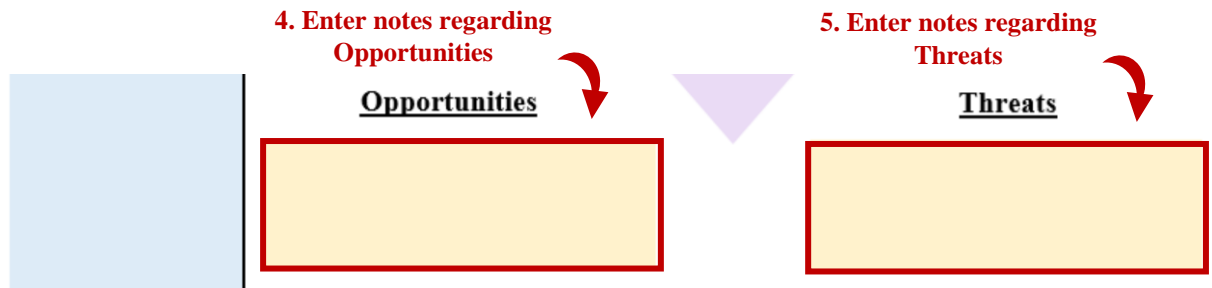
Enter an overall summary of the SWOT Analysis as well as notes for each of the four areas (Strengths, Weaknesses, Opportunities, and Threats) in the yellow boxes outlined in red on the SWOT Analysis to give additional context to the items outlined in the report.

This step can be skipped if the SWOT analysis is omitted from the report. See the Optional settings on how to exclude the SWOT analysis on the report.

||
||
||
||

1. Enter a brief summary of the SWOT Analysis.

2. Enter notes regarding Strengths <u>Strengths</u> <div style="background-color: #fff9c4; border: 2px solid red; height: 40px; margin-top: 5px;"></div>	3. Enter notes regarding Weaknesses <u>Weaknesses</u> <div style="background-color: #fff9c4; border: 2px solid red; height: 40px; margin-top: 5px;"></div>
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(Optional) Optional Report Settings

The report allows for agencies to adjust some settings for the report, to include adjusting the color scales of the speedometer chart, choosing to include or omit the SWOT analysis, and adding titles to objectives for the strategic action plan.

In the blue column on the left side of the report, the settings can be changed. For the data metrics, change indicators are included by default but can be excluded from the report if desired. To change this setting, change the “yes” to “no” in the green box for the “optional: include indicators for changes to prior year” section of the optional settings blue column (shown in the picture below).

See Below for Optional Settings for this Report

Optional: Include Indicators for Changes to Prior Year:

See Yes

1. Change to “No” to exclude change indicators.

0
Agency Number:

Employment Opportunities Plan
Fiscal Year 2023

Summary of Efforts to Increase Employment of Individuals with Disabilities

To change the color values of the speedometer chart, enter the values in the green boxes in the blue column. The green boxes represent the maximum value of the red color and the maximum value of the yellow color. **NOTE: The maximum value of the yellow color cannot be below 5%.**

The default maximum value for the red area is 3.5% and the maximum default value of the yellow area is 5%.

Before Adjustment

After Adjustment

Click for Help if needed

1. Enter Max % Value of Red Color

2. Enter Max % Value of Yellow Color

Colors for the key data metrics can be customized between green, yellow, red, or purple to highlight specific metrics. Colors for the metrics can be changed by selecting the color from the dropdown menu for the respective metric in the “Optional: Change Colors to Identify Key Metrics” section. The metric and change indicator colors are separate from one another.

If no color change is desired, the metric and change will be black text. To remove the color change, delete the color text.

Click the respective box and select desired color from drop down menu.

Metric	Change
Total	
Leader	
Executive	
Veteran	
Applicants	
Hires	
Transfers	
Promotions	
Separations	
Ex. Transfer	
AHP App	
AHP Hire	
AHP Class	

The next optional settings is to either include or omit the SWOT analysis from the report. By default, the SWOT analysis is included. To change this setting, change the green box under the “Include SWOT Analysis in Report?” optional setting in the blue column to “No”. After, click the purple “Refresh Report?” button to hide the SWOT analysis.

1. Change box to “No”

2. Click “Refresh Report” to hide SWOT Analysis

To change the setting back to including the SWOT analysis in the report, change the green box to “Yes” and click the “Refresh Report” purple button again.

The final optional setting is to add additional titles to the objectives in the final report. To add a title, enter the title text into the green box in the blue column next to the objective to add the title should be added to.

Before Title is Added

Optional: Add Title to Objective 1	<i>Upcoming Fiscal Year Action Plan</i>
	<i>Objective</i> Increased Hires at the Agency of Individuals with Disabilities

After Title Is Added

Optional: Add Title to Objective 1	<i>Upcoming Fiscal Year Action Plan</i>
Increase Hires	<i>Objective: Increase Hires</i> Increased Hires at the Agency of Individuals with Disabilities

1. Enter the Title Text into the Green Box

Step 2: Ensure the Report is Up to Date

Using the same procedures as before, ensure the report is up to date by refreshing the report using the purple Refresh Report button or refreshing the report manually.

Step 3: Export the Report to PDF

After the report is completed it can be exported as a PDF to be signed either electronically or by hand. To export the report, click the “Export Report to PDF to Sign”. This will open a dialog box to save the PDF using the standard process to save a file. The report can be viewed by going to the saved location and opening the file.

Optional Step 3: Printing the Report to PDF (without Macros)

If not using the Macros, the report can be printed as a PDF using the standard Excel print function. Go to the “File” menu, and select print. Ensure the printer is “Microsoft Print to PDF” and click “Print”. Choose the save location and click “Save”. The report can be viewed by going to the saved location and opening the file.

5.0 Submitting the Report to DHRM

Please submit the signed PDF and the Excel Template file to DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov **no later than June 30th of the reporting fiscal year.**

Please include the Agency Name and the term “EOP” in the subject line.

For Questions or Additional Assistance

For questions or assistance with the template, please contact DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov.