



WORKFORCE PLANNING AND DEVELOPMENT
CONTINUITY OF OPERATIONS • RECRUITMENT • ENGAGEMENT • RETENTION • DEVELOPMENT

AGENCY STRATEGY



WORKFORCE PLANNING AND DEVELOPMENT
SUB-AGENCY, INTERNAL DEPARTMENT, OR TEAM REVIEW



INSTRUCTIONAL GUIDE

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1.0 Workforce Planning Background

In 2017, the Virginia General Assembly created a legislative mandate ([§ 2.2-1209. Agency director human resource training and agency succession planning](#)) which requires the director of each agency in the executive branch of state government include in the agency's annual strategic plan its key workforce planning issues. DHRM's charge is to establish guidelines for the content of such workforce and succession plans.

Since then, DHRM has provided various tools and an Excel based Workforce Planning and Development report template to guide agencies on what workforce planning information to evaluate and include.

DHRM has focused on realigning the strategy to workforce planning that incorporates a more holistic approach and focuses on the areas of continuity of operations, recruitment, retention/engagement, and workforce development. DHRM is developing tools and templates using a modular design approach, which enables DHRM to build a suite of integrated and customizable workforce planning tools for agencies.



Interested in keeping up to date with workforce planning announcements?

All Announcements are published in the monthly [DHRM Highlights](#)

2.0 Agency Strategy Template

As part of the modular design approach, DHRM has created an Agency Strategy Template, which is an excel based template around the areas of continuity of operations, recruitment, retention and engagement, and workforce development.

The Agency Strategy template brings together elements from different tools and templates, such as the Agency Profile or Identifying Critical Roles tool, to allow the agency to view the full picture of workforce metrics, risks, challenges, and preparedness to craft an overall workforce strategy.

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 tab directly corresponds to information entered in the Agency Profile template. All information can be directly imported or entered manually.
- **Internal Plan Review** – The Internal Plan review tab allows for Agencies who use the Internal Sub-Agency, Department, or Team Input Tool to import internal plans and review free response questions to assist with the for the workforce planning process. *Hidden unless the tool is enabled in the Agency Profile and at least one internal group has been added.*
- **Continuity of Operations** – The Continuity of Operations tab focuses on critical elements of the workforce that significantly impact agency operations, such as workforce planning critical roles, agency retirements, and executive risk.
- **Recruitment** – The Recruitment tab identifies key metrics to the related to the applicant and hiring trends at the agency, for positions, critical roles, and demographics of applicants and hires.
- **Retention and Engagement** – The Retention and Engagement tab focuses on understanding how employees move within or out of the agency, how long they serve the agency, and more of their experience at the agency.
- **Workforce Development** – The Workforce Development tab focuses on assisting agencies with answering the question “how does the agency develop its workforce?” and can specifically focus on development for critical roles, to address upcoming retirements, and executive development.

- **Future** – The Future Direction tab focuses on examining the future direction of the agency through the strategic objectives included in the Agency Profile. For each strategic objective, actions already taken, expected outcomes, and impact to each of the WFP areas are explored.
- **Agency Strategy** – The Agency Strategy tab identifies the objectives and action items the agency intends to take to address their workforce needs, risks, and preparedness levels.
- **WFP Summary** – The WFP Summary compiles the information from the previous tabs into a single report. It begins with an executive summary, presents key metrics and information regarding the areas of workforce planning, and the agency strategy.

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 Macros if an agency wishes, but would require some manual steps when completing specific sections. More information on the design on the template are reviewed in the "Getting Started Tab" section.

3.0 Sub-Agency, Internal Department, or Team Input Tool

The Sub-Agency, Internal Department, or Team Input Tool is initially enabled in the Agency Profile Template and can be used to assist with the workforce planning process. This tool is derived from the Agency Strategy Template, using the exact same structure and format.

Completing the Sub-Agency, Internal Department or Team Input Tool

It can be completed using the same procedures for the Agency Strategy templated described in the following sections of this instructional guide; however, some sections may be hidden from view depending on the settings selected in the Agency Profile.

After the Sub-Agency, Internal Department or Team Input Tool is Returned

Once the internal tool is completed by the respective group, it can then be imported back to the Agency Profile and then the Agency Strategy Template. Data elements, such as specific data points for EEO Codes or Classifications, will automatically be added to the specific fields if the “add data” setting is selected for the respective group.

Free response questions are presented on the Internal Plan Review Tab of either the Agency Profile or Agency Strategy template. More information to review the plans for the Agency Profile can be found in the Agency Profile instructional guide. More information to review the plans for the Agency Strategy can be found in **Section 6** of this instructional guide.

4.0 Workforce Planning Data Definitions

The Agency Strategy is a core element of the Workforce Planning and Development process at the Agency. To promote alignment, definitions for specific data metrics are outlined in the [Workforce Planning Data Definitions document](#) on the DHRM Website.


The Agency Strategy includes data elements defined in both the General Definitions and Agency Strategy Template sections of the data definitions document.

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

5.0 Tab Guides

The Agency Strategy 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 'AGENCY STRATEGY' dashboard for 'WORKFORCE PLANNING AND DEVELOPMENT'. It features four main sections: 'GETTING STARTED' (0% completion), 'WORKFORCE PLANNING AREAS' (3% completion), 'FUTURE DIRECTION' (100% completion), and 'AGENCY STRATEGY & WFP SUMMARY' (43% completion). Each section has a progress bar and a description. The 'GETTING STARTED' section is highlighted with a red circle and an arrow pointing to it from the text 'Blue Name of the Tab is a Link to the Respective Tab'. The 'FUTURE DIRECTION' section's progress bar is also highlighted with a red circle and an arrow pointing to it from the text 'Progress bar Shows Step Completion'. The 'AGENCY STRATEGY & WFP SUMMARY' section is highlighted with a red circle and an arrow pointing to it from the text 'Version Number of the Template'. At the bottom, there is a footer with contact information and a version number 'Version 2022.5' which is also circled in red.

Blue Name of the Tab is a Link to the Respective Tab

Progress bar Shows Step Completion

Version Number of the Template

For questions using this template, please contact DHRM Workforce Planning at dhrm.wfp@dhrm.virginia.gov.

Version 2022.5

Getting Started Tab

The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Agency Strategy 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 and cells with a green background are optional. 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)

Level of Analysis

FOUNDATIONAL

Step Number and Title

Complete / Incomplete Indicator for Step

Incomplete

Step 1: Enter Position (Filled and Vacant) Information

INSTRUCTIONS: Please enter the number of filled and vacant positions for all positions, leader positions, and executive positions for the respective EEO Codes, Employee Classifications, and positions identified as critical roles.

Instructions on how to complete the step

Incomplete

Step 1(a): Enter Filled Position Information

INSTRUCTIONS: Please enter the total number of filled positions by EEO Code, Employee Classifications, and positions identified as critical in the yellow boxes below.

Sub-Step Number and Title

Description of what data to enter in the cell

All Filled Positions by EEO Code

	FY21	FY22
Total Filled Positions with EEO Code "Officials and Administrators"	1	
Total Filled Positions with EEO Code "Professionals"	2	
Total Filled Positions with EEO Code "Technicians"	3	
Total Filled Positions with EEO Code "Protective Service Workers"	4	
Total Filled Positions with EEO Code "Paraprofessionals"	5	
Total Filled Positions with EEO Code "Administrative Support"	6	
Total Filled Positions with EEO Code "Skilled Craft Workers"	7	
Total Filled Positions with EEO Code "Service/Maintenance"	8	
Total Filled Positions with EEO Code "Faculty"	9	
Total Filled Positions with EEO Code "Other"		

NOTE: Calculations & Formulas for Data Metrics are in the Help Window


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 Template

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.

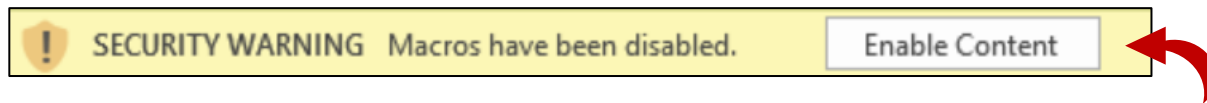
	<p style="text-align: center;">USE OF EXCEL MACROS</p> <p>This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. NOTE: Excel Macros must be enabled to use them. The template can also be used without the Macros, but will require some manual edits.</p>
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	<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>

	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>FOUNDATIONAL</p>  <p>IN-DEPTH</p>  <p>COMPREHENSIVE</p> 	<p style="text-align: center;">INCREASING LEVELS OF ANALYSIS</p> <p>To better assist with navigating the landscape of workforce planning and development, the suite of integrated tools and templates provide indicators for three levels of analysis: foundational, in-depth, and comprehensive. These levels are used to better identify why information is collected and how it can be used throughout the tools and templates.</p> <p>All foundational level elements are required and both the in-depth and comprehensive elements are highly encouraged, but optional.</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 4-9: Import Data from Other Sources

For efficiency and integration to other workforce planning and development tools, data from other sources 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.

Data Source	Data Imported
Agency Profile	Agency Name & Mission Employee Classifications Executive Team Positions (background) Agency Position Information Agency Workforce Information
Employment Opportunities Plan (EOP)	SWOT Analysis Elements (Strengths, Weakness, Opportunities, and Threats) for Recruitment, Retention and Engagement, and Workforce Development areas
Prior Year Agency Strategy*	All Continuity of Operations Data All Recruitment Data All Retention & Engagement Data Internship Required Responses Agency Strategy Objectives & Actions Items

**When importing the prior year agency strategy, only one section of the template can be imported at a time. Select the tab of the template from the dropdown menu in Step 6 of the Getting Started Tab and then follow the procedures (detailed below) to import the prior year agency strategy.*

What information should be imported from the prior year?

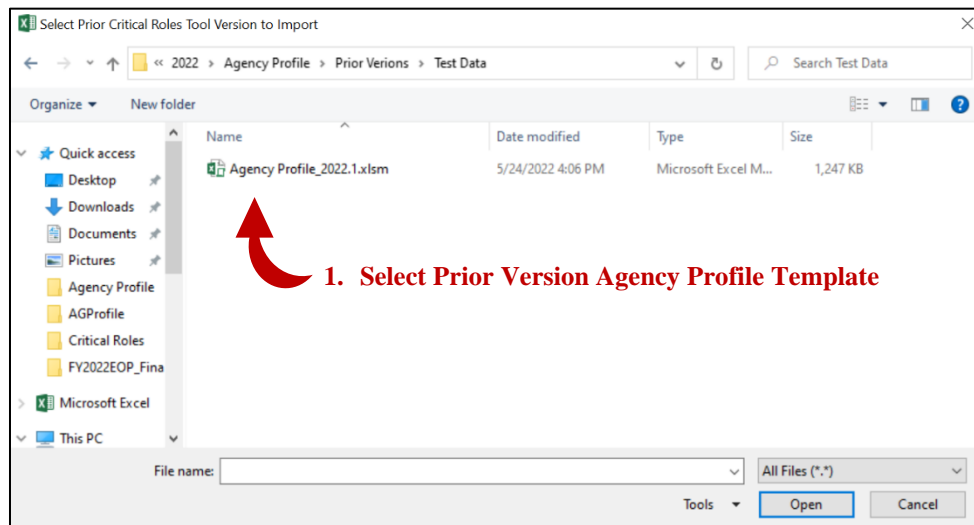
Select which Tab to Import the PY Agency Strategy. Repeat until all desired workforce plan areas are imported.

The example below is how to import data from the Agency Profile template, however, the process is the same for all data import options.


To import the data, click on the Import Data Icon  for the tool the data is imported from (such as a previous version of the Agency Profile).



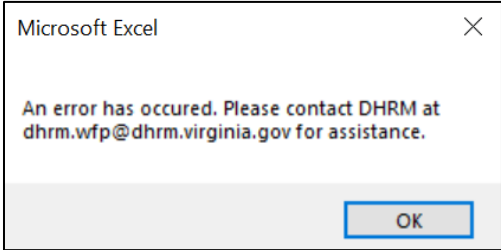
This will open the standard “Open File” dialog box. Simply locate and select the previous version Agency Profile template and click “Open”. (Shown in the picture below).



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 directly correspond to the full Agency Profile Template to include general information, position information, and workforce demographics. All this information, except the Agency Logo, can be directly imported from the Agency Profile or entered manually.

This tab mirrors the same setup as the full Agency Profile Template. [The Agency Profile Template Instructions](#) can be found on the [DHRM Workforce Planning website](#).

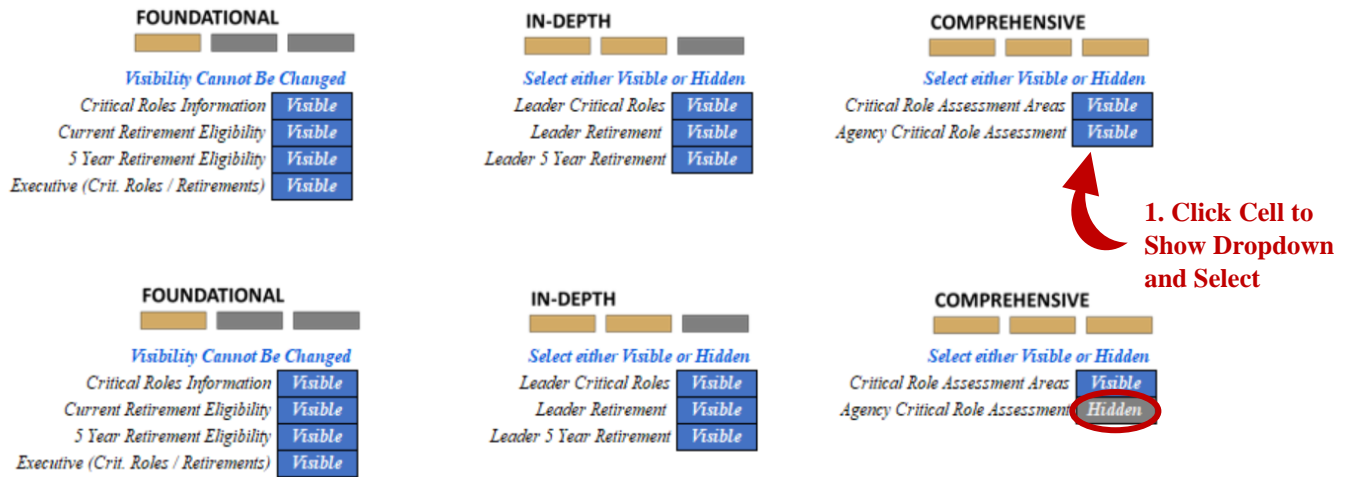
Continuity of Operations Tab

The Continuity of Operations tab focuses on critical elements of the workforce that could significantly impact agency operations, to include workforce planning critical roles, agency retirements, and executive risk. These three elements form the core of an agency’s workforce planning strategy and are followed throughout each workforce planning area in the Agency Strategy template.

(Optional) Step: Adjust Data Visibility as Needed

To assist with data entry and for ease of use, in-depth and comprehensive levels of analysis data elements (which are optional) can have their visibility toggled to prevent having to continually scroll between different elements.

To change the visibility, select visible or hidden from the dropdown menu next to the respective data element for the In-Depth and Comprehensive elements. **All items are visible by default but can be changed between visible or hidden at anytime**



Each time the visibility of data elements are changed, the tab will need to be refreshed. If the tab needs to be refreshed, the indicator will display “Need to Refresh Visibility”. The tab can be refreshed by clicking the blue “Click to Refresh Data Entry Visibility” button. After, the indicator will say “All Selected Data Elements are Visible”.



If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Critical Roles Information

If the Identifying Critical Roles Tool was used, the information from the tool can be directly imported using the “Import Data from Other Sources” steps outlined in the Getting Started Tab section.

Using the 2 step process to import the information will identify the information for critical roles and enter it into the respective cells. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for critical roles manually.

Step 1(a): Enter Positions Assessed for Criticality

To complete step 1(a), enter the total number of positions assessed for criticality by EEO Code and classification in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

All Positions Assessed for Criticality by EEO

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Positions Assessed			
Total EEO Code "Professionals" Positions Assessed			
Total EEO Code "Technicians" Positions Assessed			
Total EEO Code "Protective Service Workers" Positions Assessed			
Total EEO Code "Paraprofessionals" Positions Assessed			
Total EEO Code "Administrative Support" Positions Assessed			
Total EEO Code "Skilled Craft Workers" Positions Assessed			
Total EEO Code "Service/Maintenance" Positions Assessed			
Total EEO Code "Faculty" Positions Assessed			
Total EEO Code "Other" Positions Assessed			

1. Enter the total number of positions assessed for criticality for each EEO Code.

All Positions Assessed for Criticality by Classification

	FY21	FY22	FY23
Total Classified Positions Assessed			
Total Wage Positions Assessed			
Total Agency Head Positions Assessed			

2. Enter the total number of positions assessed for criticality for each classification.

Step 1(b): Enter Positions Identified as Critical

To complete step 1(b), enter the total number of positions identified as critical by EEO Code and classification in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Critical Positions by EEO Code

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Positions Identified as Critical			
Total EEO Code "Professionals" Positions Identified as Critical			
Total EEO Code "Technicians" Positions Identified as Critical			
Total EEO Code "Protective Service Workers" Positions Identified as Critical			
Total EEO Code "Paraprofessionals" Positions Identified as Critical			
Total EEO Code "Administrative Support" Positions Identified as Critical			
Total EEO Code "Skilled Craft Workers" Positions Identified as Critical			
Total EEO Code "Service/Maintenance" Positions Identified as Critical			
Total EEO Code "Faculty" Positions Identified as Critical			
Total EEO Code "Other" Positions Identified as Critical			

1. Enter the total number of positions identified as critical for each EEO Code.

Critical Positions by Classification

	FY21	FY22	FY23
Total Classified Positions Identified as Critical			
Total Wage Positions Identified as Critical			
Total Agency Head Positions Identified as Critical			

2. Enter the total number of positions identified as critical for each classification.

(Optional) Step 1(c): Enter Leader Positions Identified as Critical

To complete step 1(c), enter the total number of leader positions identified as critical by EEO Code and classification in the green boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Leader Critical Positions by EEO Code

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Leader Positions Identified as Critical			
Total EEO Code "Professionals" Leader Positions Identified as Critical			
Total EEO Code "Technicians" Leader Positions Identified as Critical			
Total EEO Code "Protective Service Workers" Leader Positions Identified as Critical			
Total EEO Code "Paraprofessionals" Leader Positions Identified as Critical			
Total EEO Code "Administrative Support" Leader Positions Identified as Critical			
Total EEO Code "Skilled Craft Workers" Leader Positions Identified as Critical			
Total EEO Code "Service/Maintenance" Leader Positions Identified as Critical			
Total EEO Code "Faculty" Leader Positions Identified as Critical			
Total EEO Code "Other" Leader Positions Identified as Critical			

1. Enter the total number of leader positions identified as critical for each EEO Code.

Leader Critical Positions by Classification

	FY21	FY22	FY23
Total Classified Leader Positions Identified as Critical			
Total Wage Leader Positions Identified as Critical			
Total Agency Head Leader Positions Identified as Critical			

2. Enter the total number of leader positions identified as critical for each classification.

(Optional) Step 1(d): Identifying Critical Roles Tool Assessment Area Score Breakdown

If the Identifying Critical Roles Tool data was imported, the assessment scores for each of the assessment areas (vacancy risk, recruitment, knowledge management, learning and development, operational impact, strategic initiative impact, impact from the environment, position specific elements, and additional questions) will be entered into the respective cells for the minimum, average, and maximum scores for each area.

The following steps can be used to enter the respective information for critical roles assessment manually.

	<u>Min Score by Assessment Area</u>			<u>Average Score by Assessment Area</u>			<u>Max Score by Assessment Area</u>		
	FY21	FY22	FY23	FY21	FY22	FY23	FY21	FY22	FY23
Vacancy Risk									
Recruitment									
Knowledge Management									
Learning and Development									
Operational Impact									
Strategic Initiative Impact									
Impact from the Environment									
Position Specific Elements									
Additional Questions									

1. Enter the respective score in the green box corresponding to the assessment area for the min, average, and max columns.

(Optional) Step 1(e): Critical Roles Breakdown from Agency Own Assessment

If the Agency assessed positions using their own assessment and would like to include the areas of the assessment, the same procedures listed above in Step 1(d) can be used to manually enter the information. However, one additional step is required for entering the agency's own

assessment, by entering the name of the assessment area in the respective green boxes (shown below).

1. Enter the assessment area name from the Agency assessment.

<i>Assessment Area Name</i>	<i>Min Score by Assessment Area</i>			<i>Average Score by Assessment Area</i>			<i>Max Score by Assessment Area</i>		
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>

2. Enter the respective score in the green box corresponding to the assessment area for the min, average, and max columns.

Step 2: Enter Agency Retirement Information

If the employee information for the continuity of operations metrics was imported, then retirement eligibility is automatically calculated using the parameters identified in the Agency Profile Template and entered into the respective cells. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for retirements manually.

Step 2(a): Enter Employees Currently Eligible to Retire

To complete step 2(a), enter the total number of employees eligible to retire by EEO Code and classification in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Employees Currently Eligible Retire by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total EEO Code "Officials and Administrators" Employees Currently Eligible to Retire			
Total EEO Code "Professionals" Employees Currently Eligible to Retire			
Total EEO Code "Technicians" Employees Currently Eligible to Retire			
Total EEO Code "Protective Service Workers" Employees Currently Eligible to Retire			
Total EEO Code "Paraprofessionals" Employees Currently Eligible to Retire			
Total EEO Code "Administrative Support" Employees Currently Eligible to Retire			
Total EEO Code "Skilled Craft Workers" Employees Currently Eligible to Retire			
Total EEO Code "Service/Maintenance" Employees Currently Eligible to Retire			
Total EEO Code "Faculty" Employees Currently Eligible to Retire			
Total EEO Code "Other" Employees Currently Eligible to Retire			

1. Enter the total number of employees currently eligible to retire for each EEO Code.

<i>Employees Currently Eligible Retire by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Employees Currently Eligible to Retire			
Total Wage Employees Currently Eligible to Retire			
Total Agency Head Employees Currently Eligible to Retire			

2. Enter the total number of employees currently eligible to retire for each classification.

Step 2(b): Enter Employees in Critical Roles Currently Eligible to Retire

To complete step 2(b), enter the total number of employees in critical roles eligible to retire by EEO Code and classification in the yellow boxes (shown in the picture below). Please note,

classifications are unique to the Agency. The classifications below are to provide an example only.

Employees in Critical Roles Currently Eligible to Retire

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Professionals" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Technicians" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Protective Service Workers" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Paraprofessionals" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Administrative Support" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Skilled Craft Workers" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Service/Maintenance" Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Faculty" Employees Currently in Crit. Roles Eligible to Retire			
Total EEO Code "Other" Employees Currently in Crit. Roles Eligible to Retire			

1. Enter the total number of employees in critical roles currently eligible to retire for each EEO Code.

Employees in Critical Roles Currently Eligible to Retire

	FY21	FY22	FY23
Total Classified Employees in Crit. Roles Currently Eligible to Retire			
Total Wage Employees in Crit. Roles Currently Eligible to Retire			
Total Agency Head Employees in Crit. Roles Currently Eligible to Retire			

2. Enter the total number of employees in critical roles currently eligible to retire for each classification.

Step 2(b): Enter Future Employee Retirement Eligibility

To complete step 2(c), enter the total number of employees who will become eligible to retire for each of the upcoming 5 fiscal years by EEO Code and classification in the yellow boxes (shown in the picture below). **Employees should only be counted once in the year they become eligible to retire and not subsequent years.** Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Next 5 Fiscal Year Retirements by EEO Code

	FY23	FY24	FY25	FY26	FY27
Total EEO Code "Officials and Administrators" Employees Eligible to Retire for each FY					
Total EEO Code "Professionals" Employees Eligible to Retire for each FY					
Total EEO Code "Technicians" Employees Eligible to Retire for each FY					
Total EEO Code "Protective Service Workers" Employees Eligible to Retire for each FY					
Total EEO Code "Paraprofessionals" Employees Eligible to Retire for each FY					
Total EEO Code "Administrative Support" Employees Eligible to Retire for each FY					
Total EEO Code "Skilled Craft Workers" Employees Eligible to Retire for each FY					
Total EEO Code "Service/Maintenance" Employees Eligible to Retire for each FY					
Total EEO Code "Faculty" Employees Eligible to Retire for each FY					
Total EEO Code "Other" Employees Eligible to Retire for each FY					

1. Enter the total number of employees eligible to retire in the FY they will be eligible for each EEO Code.

Next 5 Fiscal Year Retirements by Classification

	FY23	FY24	FY25	FY26	FY27
Total Classified Employees Eligible to Retire for each FY					
Total Wage Employees Eligible to Retire for each FY					
Total Agency Head Employees Eligible to Retire for each FY					

2. Enter the total number of employees eligible to retire in the FY they will be eligible for each classification.

Step 2(b): Enter Future Employees in Critical Roles Retirement Eligibility

To complete step 2(c), enter the total number of employees in critical roles who will become eligible to retire for each of the upcoming 5 fiscal years by EEO Code and classification in the

yellow boxes (shown in the picture below). **Employees should only be counted once in the year they become eligible to retire and not subsequent years.** Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Next 5 Fiscal Year Crit. Roles Retirements by EEO Code

	FY23	FY24	FY25	FY26	FY27
Total EEO Code "Officials and Administrators" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Professionals" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Technicians" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Protective Service Workers" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Paraprofessionals" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Administrative Support" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Skilled Craft Workers" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Service/Maintenance" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Faculty" Employees in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Other" Employees in Crit. Roles Eligible to Retire for each FY					

Next 5 Fiscal Year Crit. Roles Retirements by Classification

	FY23	FY24	FY25	FY26	FY27
Total Classified Employees in Crit. Roles Eligible to Retire for each FY					
Total Wage Employees in Crit. Roles Eligible to Retire for each FY					
Total Agency Head Employees in Crit. Roles Eligible to Retire for each FY					

1. Enter the total number of employees in critical roles eligible to retire in the FY they will be eligible for each EEO Code.

2. Enter the total number of employees in critical roles eligible to retire in the FY they will be eligible for each classification.

(Optional) Step 2(e) through Step 2(h): Leader Retirement Information

To complete step 2(e) through Step 2(h), the same information for all employees can be entered in the respective green boxes for employees who are leaders, defined as having at least one direct report. This includes the number of leaders currently eligible to retire, leaders in critical roles currently eligible to retire, leaders who will be eligible to retire in the upcoming five fiscal years, and leaders in critical roles who will be eligible to retire in the upcoming five fiscal years.

The same process described above for each section can be repeated to enter this information, with the exception of the boxes being green instead of yellow (since the information is optional).

Step 3: Enter Agency Executive Risk Information

To have imported information for executives calculate automatically, the Agency Profile, which identifies the specific positions of the executive team, must be imported. If not, the executive metrics will not be calculated.

After the Agency Profile is imported, the critical roles assessment and employee information can both be imported to calculate the executive metrics. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for retirements manually.

Step 3(a): Executive Position Information (Appointed and Degree from Agency Head)

To complete Step 3(a), enter total number of appointed executive positions and the number of positions for each degree of separation from the agency head in the yellow boxes (shown in the picture below).

<i>Number of Appointed Executive Positions</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Appointed Executive Positions			

<i>Executive Position Degree From Agency Head</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Executive Position 1 Degree from Agency Head			
Total Executive Position 2 Degree from Agency Head			
Total Executive Position 3 Degree from Agency Head			
Total Executive Position 4 Degree from Agency Head			
Total Executive Position 5 Degree from Agency Head			
Total Executive Position Greater than 5 Degrees from Agency Head			

1. Enter the total number of appointed executive positions.

2. Enter the total number of executive positions for each degree of separation from the Agency head

Step 3(b): Enter Executive Positions Identified as Critical

To complete step 3(b), enter the total number of executive positions identified as critical by EEO Code and classification in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Executive Critical Positions by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total EEO Code "Officials and Administrators" Executive Positions Identified as Critical			
Total EEO Code "Professionals" Executive Positions Identified as Critical			
Total EEO Code "Technicians" Executive Positions Identified as Critical			
Total EEO Code "Protective Service Workers" Executive Positions Identified as Critical			
Total EEO Code "Paraprofessionals" Executive Positions Identified as Critical			
Total EEO Code "Administrative Support" Executive Positions Identified as Critical			
Total EEO Code "Skilled Craft Workers" Executive Positions Identified as Critical			
Total EEO Code "Service/Maintenance" Executive Positions Identified as Critical			
Total EEO Code "Faculty" Executive Positions Identified as Critical			
Total EEO Code "Other" Executive Positions Identified as Critical			

<i>Executive Critical Positions by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Executive Positions Identified as Critical			
Total Wage Executive Positions Identified as Critical			
Total Agency Head Executive Positions Identified as Critical			

1. Enter the total number of executive positions identified as critical for each EEO Code.

2. Enter the total number of executive positions identified as critical for each classification.

Step 3(c): Enter Executive Employees Currently Eligible to Retire

To complete step 3(c), enter the total number of executive employees eligible to retire by EEO Code and classification in the yellow boxes (shown in the picture below). Please note,

classifications are unique to the Agency. The classifications below are to provide an example only.

Executives Currently Eligible to Retire by EEO Code

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Executive Employees Currently Eligible to Retire			
Total EEO Code "Professionals" Executive Employees Currently Eligible to Retire			
Total EEO Code "Technicians" Executive Employees Currently Eligible to Retire			
Total EEO Code "Protective Service Workers" Executive Employees Currently Eligible to Retire			
Total EEO Code "Paraprofessionals" Executive Employees Currently Eligible to Retire			
Total EEO Code "Administrative Support" Executive Employees Currently Eligible to Retire			
Total EEO Code "Skilled Craft Workers" Executive Employees Currently Eligible to Retire			
Total EEO Code "Service/Maintenance" Executive Employees Currently Eligible to Retire			
Total EEO Code "Faculty" Executive Employees Currently Eligible to Retire			
Total EEO Code "Other" Executive Employees Currently Eligible to Retire			

1. Enter the total number of executive employees currently eligible to retire for each EEO Code.

Executives Currently Eligible to Retire by Classification

	FY21	FY22	FY23
Total Classified Executive Employees Currently Eligible to Retire			
Total Wage Executive Employees Currently Eligible to Retire			
Total Agency Head Executive Employees Currently Eligible to Retire			

2. Enter the total number of executive employees currently eligible to retire for each classification.

Step 3(d): Enter Executive Employees in Critical Roles Currently Eligible to Retire

To complete step 3(d), enter the total number of executive employees in critical roles eligible to retire by EEO Code and classification in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Executives in Critical Roles Currently Eligible to Retire by EEO Code

	FY21	FY22	FY23
Total EEO Code "Officials and Administrators" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Professionals" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Technicians" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Protective Service Workers" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Paraprofessionals" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Administrative Support" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Skilled Craft Workers" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Service/Maintenance" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Faculty" Executive Employees in Crit. Roles Currently Eligible to Retire			
Total EEO Code "Other" Executive Employees in Crit. Roles Currently Eligible to Retire			

1. Enter the total number of executive employees in critical roles currently eligible to retire for each EEO Code.

Executives in Critical Roles Currently Eligible to Retire by Classification

	FY21	FY22	FY23
Total Classified Executive Employees in Crit. Roles Currently Eligible to Retire			
Total Wage Executive Employees in Crit. Roles Currently Eligible to Retire			
Total Agency Head Executive Employees in Crit. Roles Currently Eligible to Retire			

2. Enter the total number of executive employees in critical roles currently eligible to retire for each classification.

Step 3(e): Enter Future Executive Employee Retirement Eligibility

To complete step 3(e), enter the total number of executive employees who will become eligible to retire for each of the upcoming 5 fiscal years by EEO Code and classification in the yellow boxes (shown in the picture below). **Executives should only be counted once in the year they**

become eligible to retire and not subsequent years. Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Next 5 Fiscal Year Executive Retirements by EEO Code

	FY23	FY24	FY25	FY26	FY27
Total EEO Code "Officials and Administrators" Executives Eligible to Retire for each FY					
Total EEO Code "Professionals" Executives Eligible to Retire for each FY					
Total EEO Code "Technicians" Executives Eligible to Retire for each FY					
Total EEO Code "Protective Service Workers" Executives Eligible to Retire for each FY					
Total EEO Code "Paraprofessionals" Executives Eligible to Retire for each FY					
Total EEO Code "Administrative Support" Executives Eligible to Retire for each FY					
Total EEO Code "Skilled Craft Workers" Executives Eligible to Retire for each FY					
Total EEO Code "Service/Maintenance" Executives Eligible to Retire for each FY					
Total EEO Code "Faculty" Executives Eligible to Retire for each FY					
Total EEO Code "Other" Executives Eligible to Retire for each FY					

1. Enter the total number of executive employees eligible to retire in the FY they will be eligible for each EEO Code.

Next 5 Fiscal Year Executive Retirements by Classification

	FY23	FY24	FY25	FY26	FY27
Total Classified Executives Eligible to Retire for each FY					
Total Wage Executives Eligible to Retire for each FY					
Total Agency Head Executives Eligible to Retire for each FY					

2. Enter the total number of executive employees eligible to retire in the FY they will be eligible for each classification.

Step 3(f): Enter Executive Future Employees in Critical Roles Retirement Eligibility

To complete step 3(f), enter the total number of executive employees in critical roles who will become eligible to retire for each of the upcoming 5 fiscal years by EEO Code and classification in the yellow boxes (shown in the picture below). **Executives should only be counted once in the year they become eligible to retire and not subsequent years.** Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Next 5 Fiscal Year Executive Crit. Roles Retirements by EEO Code

	FY23	FY24	FY25	FY26	FY27
Total EEO Code "Officials and Administrators" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Professionals" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Technicians" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Protective Service Workers" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Paraprofessionals" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Administrative Support" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Skilled Craft Workers" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Service/Maintenance" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Faculty" Executives in Crit. Roles Eligible to Retire for each FY					
Total EEO Code "Other" Executives in Crit. Roles Eligible to Retire for each FY					

1. Enter the total number of executive employees in critical roles eligible to retire in the FY they will be eligible for each EEO Code.

Next 5 Fiscal Year Executive Crit. Roles Retirements by Classification

	FY23	FY24	FY25	FY26	FY27
Total Classified Executives in Crit. Roles Eligible to Retire for each FY					
Total Wage Executives in Crit. Roles Eligible to Retire for each FY					
Total Agency Head Executives in Crit. Roles Eligible to Retire for each FY					

2. Enter the total number of executive employees in critical roles eligible to retire in the FY they will be eligible for each classification.

(Optional Use): Workforce Insights Section

The workforce insights section provides a brief review of the information entered above to assist with interpreting continuity of operations information that can help with completing the remaining steps. To adjust the graphics, select a fiscal year and demographic group from the drop down menus in the yellow boxes.

Select Items Below to Change Graphics:

Fiscal Year:	FY22
Demographic	ALL

1. Click on the yellow box to show the dropdown arrow. Click the dropdown arrow to select a different group.

Step 4: Complete a SWOT Analysis

To complete Step 4, enter a brief, high level, description of the items in each respective category (Strengths, Weaknesses, Opportunities, and Threats) for the area of continuity of operations in the yellow box beneath the respective category.

NOTE: See the SWOT help feature for additional information on the different categories.



Step 4: Complete a SWOT Analysis

Incomplete

INSTRUCTIONS: 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 SWOT analysis. Enter a brief, high level, description of the items in each respective category for each area of the analysis. Use the check box beneath each category if there is nothing to enter.

Click for Help if needed

Step 4(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 meet the agency's needs regarding the continuity of operations.

1. Enter the description for the SWOT analysis area in the yellow box.

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

If there is nothing to enter for the respective SWOT Analysis category, the checkbox in the blue bar beneath the yellow can be selected. This will gray out the area for the respective SWOT Analysis area.

Step 4(a): Enter Agency Strengths

Complete

Strengths are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **ENHANCE** an Agency's ability to meet the agency's needs regarding the continuity of operations.

<input checked="" type="checkbox"/> Check box if there is nothing to enter for this category.

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 agency strategy template is imported.**



<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.



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

Prior Year SWOT item description

Repeat this process for each of the areas of the SWOT Analysis.

Step 5: Overall Continuity of Operations Risk and Agency Preparedness

To complete step 5, identify the overall risk level and agency preparedness level regarding the continuity of operations by using entering the specific level of risk and preparedness. After, enter a brief description of the agency needs to address any gaps between the risk and preparedness level or to maintain the current level of preparedness.

Step 5(a): Identify Continuity of Operations Risk

To complete Step 5(a), enter a number between 1 and 100 to indicate the level of risk and click enter. The graphic will then be updated to show the respective level of risk. Continue to adjust the risk number until the chart displays the correct level of risk to the agency.

Step 5(b): Identify Continuity of Operations Preparedness

To complete Step 5(b), use the same procedure as Step 5(a) to identify the agency preparedness level related to the continuity of operations.

Step 5(c): Identify Agency Needs to Address Gap or Maintain Preparedness Level

To complete Step 5(c), enter a brief description of the agency needs to address any gaps between the risk level and preparedness level identified for continuity of operations, or to maintain the current preparedness level in the yellow box (shown in the picture below).

Step 5(c): Agency Needs to Address Gap or Maintain Preparedness Level

Incomplete

INSTRUCTIONS: In the event the risk level exceeds the preparedness level, please provide a brief description in the yellow box below of the agency needs in order to address the gap between the continuity of operations risk level and preparedness. If the preparedness level is higher than the risk level, please provide a brief description of how the agency can maintain the higher preparedness level.

1. Enter the description for the needs to address gaps or maintain preparedness.



(Optional) Step 6: 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 6: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue "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

Recruitment Tab

The Recruitment Tab identifies key metrics related to the applicant and hiring trends at the agency, focusing on position information (including position criticality) and demographics of applicants and hires for all positions, leader positions, and executive positions. Time to fill for the fiscal year is explored through the lens of EEO Code, Classification, Critical Positions, Leader, and Executive Positions.

(Optional) Step: Adjust Data Visibility as Needed

To assist with data entry and for ease of use, in-depth and comprehensive levels of analysis data elements (which are optional) can have their visibility toggled to prevent having to continually scroll between different elements.

To change the visibility, select visible or hidden from the dropdown menu next to the respective data element for the In-Depth and Comprehensive elements. **All items are visible by default but can be changed between visible or hidden at anytime**

FOUNDATIONAL
 Visibility Cannot Be Changed
 Filled & Vacant Positions Visible
 Applicant Information Visible
 Hiring Information Visible
 Time to Fill Information Visible

IN-DEPTH
 Select either Visible or Hidden
 All Leader Recruitment Metrics Visible
 All Executive Recruitment Metrics Visible
 Time to Fill by Quarter Visible

COMPREHENSIVE
 Select either Visible or Hidden
 Recruitment Demographics Visible

FOUNDATIONAL
 Visibility Cannot Be Changed
 Filled & Vacant Positions Visible
 Applicant Information Visible
 Hiring Information Visible
 Time to Fill Information Visible

IN-DEPTH
 Select either Visible or Hidden
 All Leader Recruitment Metrics Visible
 All Executive Recruitment Metrics Visible
 Time to Fill by Quarter Visible

COMPREHENSIVE
 Select either Visible or Hidden
 Recruitment Demographics Hidden

1. Click Cell to Show Dropdown and Select

Each time the visibility of data elements are changed, the tab will need to be refreshed. If the tab needs to be refreshed, the indicator will display “Need to Refresh Visibility”. The tab can be refreshed by clicking the blue “Click to Refresh Data Entry Visibility” button. After, the indicator will say “All Selected Data Elements are Visible”.

Need to Refresh Visibility.

Click to Refresh Data Entry Visibility

1. Click to Refresh Tab

All Selected Data Elements are Visible.

Click to Refresh Data Entry Visibility

If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Position (Filled and Vacant Information)

If the RMS Report was used, the information from the report can be directly imported using the “Import Data from Other Sources” steps outlined in the Getting Started Tab section.

Using the 2 step process to import the information will identify the information for total positions filled, vacant positions (if posted in the RMS), hires, applicant information, and time to fill. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for filled and vacant positions manually.

Step 1(a): Enter Filled Position Information

To complete step 1(a), enter the total number of filled positions at the agency during the fiscal year by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>All Filled Positions by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Filled Positions with EEO Code "Officials and Administrators"			
Total Filled Positions with EEO Code "Professionals"			
Total Filled Positions with EEO Code "Technicians"			
Total Filled Positions with EEO Code "Protective Service Workers"			
Total Filled Positions with EEO Code "Paraprofessionals"			
Total Filled Positions with EEO Code "Administrative Support"			
Total Filled Positions with EEO Code "Skilled Craft Workers"			
Total Filled Positions with EEO Code "Service/Maintenance"			
Total Filled Positions with EEO Code "Faculty"			
Total Filled Positions with EEO Code "Other"			

1. Enter the total number of filled positions for each EEO Code.

<i>All Filled Positions by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Filled Positions			
Total Wage Filled Positions			
Total Agency Head Filled Positions			

2. Enter the total number of filled positions for each classification.

<i>All Filled Critical Roles</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Critical Positions Filled			

3. Enter the total number of critical positions filled.

(Optional) Step 1(b) and Step 1(c): Leader and Executive Filled Positions

To complete step 1(b) and step 1(c), enter the total number of filled leader and executive positions at the agency during the fiscal year by EEO Code, classification, and critical roles using the same procedures as step 1(a), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 1(d): Enter Vacant Position Information

To complete step 1(d), enter the total number of vacant positions at the agency (at the end of the reporting fiscal year) by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>All Vacant Positions by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Vacant Positions with EEO Code "Officials and Administrators"			
Total Vacant Positions with EEO Code "Professionals"			
Total Vacant Positions with EEO Code "Technicians"			
Total Vacant Positions with EEO Code "Protective Service Workers"			
Total Vacant Positions with EEO Code "Paraprofessionals"			
Total Vacant Positions with EEO Code "Administrative Support"			
Total Vacant Positions with EEO Code "Skilled Craft Workers"			
Total Vacant Positions with EEO Code "Service/Maintenance"			
Total Vacant Positions with EEO Code "Faculty"			
Total Vacant Positions with EEO Code "Other"			

1. Enter the total number of vacant positions for each EEO Code.

<i>All Vacant Positions by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Vacant Positions			
Total Wage Vacant Positions			
Total Agency Head Vacant Positions			

2. Enter the total number of vacant positions for each classification.

<i>All Vacant Critical Roles</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Vacant Positions Identified as Critical			

3. Enter the total number of vacant critical positions.

(Optional) Step 1(e) and Step 1(f): Leader and Executive Vacant Positions

To complete step 1(e) and step 1(f), enter the total number of vacant leader and executive positions at the agency at the end of the reporting fiscal year by EEO Code, classification, and critical roles using the same procedures as step 1(d), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 2: Enter Applicant Totals and Demographic Information

If the RMS Report was used, the information from the report can be directly imported using the “Import Data from Other Sources” steps outlined in the Getting Started Tab section.

Using the 2 step process to import the information will identify the information for total positions filled, vacant positions (if posted in the RMS), hires, applicant information, and time to fill. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for applicants manually.

Step 2(a): Enter Applicant Information

To complete step 2(a), enter the total number of applicants at the agency during the fiscal year by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Total Applicants by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Applicants to EEO Code "Officials and Administrators" Positions			
Total Applicants to EEO Code "Professionals" Positions			
Total Applicants to EEO Code "Technicians" Positions			
Total Applicants to EEO Code "Protective Service Workers" Positions			
Total Applicants to EEO Code "Paraprofessionals" Positions			
Total Applicants to EEO Code "Administrative Support" Positions			
Total Applicants to EEO Code "Skilled Craft Workers" Positions			
Total Applicants to EEO Code "Service/Maintenance" Positions			
Total Applicants to EEO Code "Faculty" Positions			
Total Applicants to EEO Code "Other" Positions			

1. Enter the total applicants to positions for each EEO Code.

<i>Total Applicants by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Applicants			
Total Wage Applicants			
Total Agency Head Applicants			

2. Enter the total applicants to positions for each classification.

<i>Total Applicants to Critical Roles</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Applicants to Critical Positions			

3. Enter the total applicants to critical positions.

(Optional) Enter Applicant Demographic Information

To complete this optional step, enter the total number of applicants for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency during the fiscal year in the green boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Total Applicants by Gender</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Male Applicants			
Female Applicants			

1. Enter the total number of applicants for each gender.

<i>Total Applicants by Race</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
American Indian or Alaskan Native Applicants			
Asian Applicants			
Black or African American Applicants			
Hispanic or Latino Applicants			
Native Hawaiian or Other Pac. Islander Applicants			
White Applicants			
Two or More Races			
Race Unknown or not Entered Applicants			

2. Enter the total number of applicants for each race.

<i>Total Applicants for Additional Demographics</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Applicants with Disabilities			
Veteran Applicants			

3. Enter the total number of applicants for each demographic.

(Optional) Step 2(b) and Step 2(c): Leader and Executive Applicants

To complete step 2(b) and step 2(c), enter the total number of applicants to leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 2(a), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 3: Enter Hire Totals and Demographic Information

If the RMS Report was used, the information from the report can be directly imported using the “Import Data from Other Sources” steps outlined in the Getting Started Tab section.

Using the 2 step process to import the information will identify the information for total positions filled, vacant positions (if posted in the RMS), hires, applicant information, and time to fill. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for hires manually.

Step 3(a): Enter Hiring Information

To complete step 3(a), enter the total number of hires at the agency during the fiscal year by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Total Hires by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Hires to EEO Code "Officials and Administrators" Positions			
Total Hires to EEO Code "Professionals" Positions			
Total Hires to EEO Code "Technicians" Positions			
Total Hires to EEO Code "Protective Service Workers" Positions			
Total Hires to EEO Code "Paraprofessionals" Positions			
Total Hires to EEO Code "Administrative Support" Positions			
Total Hires to EEO Code "Skilled Craft Workers" Positions			
Total Hires to EEO Code "Service/Maintenance" Positions			
Total Hires to EEO Code "Faculty" Positions			
Total Hires to EEO Code "Other" Positions			

1. Enter the total hires to positions for each EEO Code.

<i>Total Hires by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Classified Hires			
Total Wage Hires			
Total Agency Head Hires			

2. Enter the total hires to positions for each classification.

<i>All Hires to Critical Roles</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Hires to Critical Positions			

3. Enter the total hires to critical positions.

(Optional) Enter Hire Demographic Information

To complete this optional step, enter the total number of hires for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency during the

fiscal year in the green boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Total Hires by Gender</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Male Hires			
Female Hires			

1. Enter the total number of hires for each gender.

<i>Total Hires by Race</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
American Indian or Alaskan Native Hires			
Asian Hires			
Black or African American Hires			
Hispanic or Latino Hires			
Native Hawaiian or Other Pac. Islander Hires			
White Hires			
Two or More Races			
Race Unknown or not Entered Hires			

2. Enter the total number of hires for each race.

<i>Total Hires for Additional Demographics</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Hires with Disabilities			
Veteran Hires			

3. Enter the total number of hires for each demographic.

(Optional) Step 3(b) and Step 3(c): Leader and Executive Hires

To complete step 3(b) and step 3(c), enter the total number of hires to leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 3(a), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 4: Enter Time to Fill Information

If the RMS Report was used, the information from the report can be directly imported using the “Import Data from Other Sources” steps outlined in the Getting Started Tab section.

Using the 2 step process to import the information will identify the information for total positions filled, vacant positions (if posted in the RMS), hires, applicant information, and time to fill. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective information for time to fill manually.

Step 4(a): Enter Time to Fill Information

To complete step 4(a), enter the average time to fill for all positions and the average time to fill for by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Average Time to Fill (All Positions)

	FY21	FY22	FY23
Average Time to Fill			

1. Enter average time to fill for all positions.

Average Time to Fill by EEO Code

	FY21	FY22	FY23
Average Time to Fill for EEO Code "Officials and Administrators" Positions			
Average Time to Fill for EEO Code "Professionals" Positions			
Average Time to Fill for EEO Code "Technicians" Positions			
Average Time to Fill for EEO Code "Protective Service Workers" Positions			
Average Time to Fill for EEO Code "Paraprofessionals" Positions			
Average Time to Fill for EEO Code "Administrative Support" Positions			
Average Time to Fill for EEO Code "Skilled Craft Workers" Positions			
Average Time to Fill for EEO Code "Service/Maintenance" Positions			
Average Time to Fill for EEO Code "Faculty" Positions			
Average Time to Fill for EEO Code "Other" Positions			

2. Enter the average time to fill for each EEO Code.

Average Time to Fill by Classification

	FY21	FY22	FY23
Average Time to Fill for Classified Positions			
Average Time to Fill for Wage Positions			
Average Time to Fill for Agency Head Positions			

3. Enter the average time to fill for each classification.

Average Time to Fill for Critical Roles

	FY21	FY22	FY23
Average Time to Fill for Critical Positions			

4. Enter the average time to fill for critical positions.

(Optional) Step 4(b) and Step 4(c): Leader and Executive Time to Fill

To complete step 4(b) and step 4(c), enter the average time to fill for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 4(a), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

(Optional) Step 4(d): Enter Time to Fill Information by Quarter

To complete step 4(d), enter the average time to fill for all positions, leader positions, executive positions, and the average time to fill for by EEO Code, classification, and critical roles for each quarter in the green boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

	<u>Quarter 1</u>			<u>Quarter 2</u>			<u>Quarter 3</u>			<u>Quarter 4</u>		
	FY21	FY22	FY23	FY21	FY22	FY23	FY21	FY22	FY23	FY21	FY22	FY23
Average Time to Fill for All Positions												
Average Time to Fill Leader Positions												
Average Time to Fill Executive Positions												

1. Enter the average time to fill for the respective positions (label on the left) for each quarter.

Repeat this process for each EEO Code, Classification, and Critical Positions.

(Optional Use): Workforce Insights Section

The workforce insights section provides a brief review of the information entered above to assist with interpreting recruitment information that can help with completing the remaining steps. To adjust the graphics, select a fiscal year and demographic group from the drop down menus in the yellow boxes.

Select Items Below to Change Graphics:
Fiscal Year:
Demographic:

1. Click on the yellow box to show the dropdown arrow. Click the dropdown arrow to select a different group.

Optional information can also be viewed or hidden within the workforce insights section by clicking the respective blue button (example shown below) to show or hide the respective section.

Show / Hide Time to Fill by Quarter

Step 5: Complete a SWOT Analysis

To complete Step 5, enter a brief, high level, description of the items in each respective category (Strengths, Weaknesses, Opportunities, and Threats) for the area of recruitment in the yellow box beneath the respective category.

NOTE: See the SWOT help feature for additional information on the different categories.



Step 4: Complete a SWOT Analysis

Incomplete

INSTRUCTIONS: 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 SWOT analysis. Enter a brief, high level, description of the items in each respective category for each area of the analysis. Use the check box beneath each category if there is nothing to enter.

Click for Help if needed

Step 4(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 meet the agency's needs regarding the continuity of operations.

1. Enter the description for the SWOT analysis area in the yellow box.



Check box if there is nothing to enter for this category.

If there is nothing to enter for the respective SWOT Analysis category, the checkbox in the blue bar beneath the yellow can be selected. This will gray out the area for the respective SWOT Analysis area.

Step 4(a): Enter Agency Strengths

Complete

Strengths are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **ENHANCE** an Agency's ability to meet the agency's needs regarding the continuity of operations.

<input checked="" type="checkbox"/> Check box if there is nothing to enter for this category.

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 agency strategy template is imported.**



<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.



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

Repeat this process for each of the areas of the SWOT Analysis.

Step 6: Overall Recruitment Risk and Agency Preparedness

To complete step 6, identify the overall risk level and agency preparedness level regarding the recruitment by entering the specific level of risk and preparedness. After, enter a brief

description of the agency needs to address any gaps between the risk and preparedness level or to maintain the current level of preparedness.

Step 6(a): Identify Recruitment Risk

To complete Step 6(a), enter a number between 1 and 100 to indicate the level of risk and click enter. The graphic will then be updated to show the respective level of risk. Continue to adjust the risk number until the chart displays the correct level of risk to the agency.

Step 6(b): Identify Recruitment Preparedness

To complete Step 6(b), use the same procedure as Step 6(a) to identify the agency preparedness level related to recruitment.

Step 6(c): Identify Agency Needs to Address Gap or Maintain Preparedness Level

To complete Step 6(c), enter a brief description of the agency needs to address any gaps between the risk level and preparedness level identified for recruitment, or to maintain the current preparedness level in the yellow box (shown in the picture below).

Step 6(c): Agency Needs to Address Gap or Maintain Preparedness Level

Incomplete

INSTRUCTIONS: In the event the risk level exceeds the preparedness level, please provide a brief description in the yellow box below of the agency needs in order to address the gap between the recruitment risk level and preparedness. If the preparedness level is higher than the risk level, please provide a brief description of how the agency can maintain the higher preparedness level.

- 1. Enter the description for the needs to address gaps or maintain preparedness.**



(Optional) Step 7: 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 7: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue “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**

Retention & Engagement Tab

The Retention and Engagement tab identifies key metrics related to retention and engagement of agency employees, which makes up the majority of the workforce metrics. This tab focuses on

understanding how employees move within or out of the agency, how long they serve the agency, and more of their experience at the agency.

(Optional) Step: Adjust Data Visibility as Needed

To assist with data entry and for ease of use, in-depth and comprehensive levels of analysis data elements (which are optional) can have their visibility toggled to prevent having to continually scroll between different elements.

To change the visibility, select visible or hidden from the dropdown menu next to the respective data element for the In-Depth and Comprehensive elements. **All items are visible by default but can be changed between visible or hidden at anytime**

<p>FOUNDATIONAL</p> <p>Visibility Cannot Be Changed</p> <p>Average Years of Service Visible</p> <p>Internal Promotions Visible</p> <p>Internal Transfers Visible</p> <p>External Transfers Visible</p> <p>Voluntary Separations Visible</p> <p><i>NOTE: Includes All Employees, Employees within First 5 Years, and First Year Employees.</i></p>	<p>IN-DEPTH</p> <p>Select either Visible or Hidden</p> <p>All Leader Retention Metrics Visible</p> <p>All Executive Retention Metrics Visible</p> <p>Exit or Engagement Survey Visible</p> <p>Engagement Events Visible</p> <p>Employee Recognition Visible</p>	<p>COMPREHENSIVE</p> <p>Select either Visible or Hidden</p> <p>Retention Demographics Visible</p>	<p>1. Click Cell to Show Dropdown and Select</p>
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<p>FOUNDATIONAL</p> <p>Visibility Cannot Be Changed</p> <p>Average Years of Service Visible</p> <p>Internal Promotions Visible</p> <p>Internal Transfers Visible</p> <p>External Transfers Visible</p> <p>Voluntary Separations Visible</p> <p><i>NOTE: Includes All Employees, Employees within First 5 Years, and First Year Employees.</i></p>	<p>IN-DEPTH</p> <p>Select either Visible or Hidden</p> <p>All Leader Retention Metrics Visible</p> <p>All Executive Retention Metrics Visible</p> <p>Exit or Engagement Survey Visible</p> <p>Engagement Events Visible</p> <p>Employee Recognition Visible</p>	<p>COMPREHENSIVE</p> <p>Select either Visible or Hidden</p> <p>Retention Demographics Hidden</p>
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Each time the visibility of data elements are changed, the tab will need to be refreshed. If the tab needs to be refreshed, the indicator will display “Need to Refresh Visibility”. The tab can be refreshed by clicking the blue “Click to Refresh Data Entry Visibility” button. After, the indicator will say “All Selected Data Elements are Visible”.

<p><i>Need to Refresh Visibility.</i></p>	<p>Click to Refresh Data Entry Visibility</p>
<p><i>All Selected Data Elements are Visible.</i></p>	<p>Click to Refresh Data Entry Visibility</p>

1. Click to Refresh Tab

If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Retention Information for All Employees

The following steps can be used to enter the respective retention information manually.

Step 1(a): Enter Average Years of Service for All Employees

To complete step 1(a), enter the average years of service for all employees by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Average Years of Service for All Employees</i>			
	FY21	FY22	FY23
Average Years of Service for All Employees			

1. Enter average years of service for all employees.

<i>Average Years of Service for All Employees by EEO Code</i>			
	FY21	FY22	FY23
Average Years of Service for EEO Code "Officials and Administrators" Employees			
Average Years of Service for EEO Code "Professionals" Employees			
Average Years of Service for EEO Code "Technicians" Employees			
Average Years of Service for EEO Code "Protective Service Workers" Employees			
Average Years of Service for EEO Code "Paraprofessionals" Employees			
Average Years of Service for EEO Code "Administrative Support" Employees			
Average Years of Service for EEO Code "Skilled Craft Workers" Employees			
Average Years of Service for EEO Code "Service/Maintenance" Employees			
Average Years of Service for EEO Code "Faculty" Employees			
Average Years of Service for EEO Code "Other" Employees			

2. Enter the average years of service for each EEO Code.

<i>Average Years of Service for All Employees by Classification</i>			
	FY21	FY22	FY23
Classified Employees Average Years of Service			
Wage Employees Average Years of Service			
Agency Head Employees Average Years of Service			

3. Enter the average years of service for each classification.

<i>Average Years of Service for All Employees in Critical Roles</i>			
	FY21	FY22	FY23
Average Years of Service for Critical Positions			

4. Enter the average years of service for critical positions.

(Optional) Enter Average Years of Service Demographic Information

To complete this optional step, enter average years of service for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency in the green boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Average Years of Service for All Employees by Gender

	FY21	FY22	FY23
Male Average Years of Service			
Female Average Years of Service			

1. Enter the average years of service for each gender.

Average Years of Service for All Employees by Race

	FY21	FY22	FY23
American Indian or Alaskan Native Average Years of Service			
Asian Average Years of Service			
Black or African American Average Years of Service			
Hispanic or Latino Average Years of Service			
Native Hawaiian or Other Pac. Islander Average Years of Service			
White Average Years of Service			
Two or More Races Average Years of Service			
Race Unknown or not Entered Average Years of Service			

2. Enter the average years of service for each race.

Average Years of Service for All Employees of Additional Demographics

	FY21	FY22	FY23
Average Years of Service for Employees with Disabilities			
Veteran Average Years of Service			

3. Enter the average years of service for each demographic.

(Optional) Step 1(a-i) and Step 1(a-ii): Leader and Executive Average Years of Service

To complete Step 1(a-i) and Step 1(a-ii) enter the average years of service for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 1(a), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 1(b): Enter Internal Promotions for All Employees

To complete step 1(b), enter the total internal promotions for all employees by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

Internal Promotions of All Employees

	FY21	FY22	FY23
Internal Promotions of All Employees			

1. Enter total internal promotions for all employees.

Internal Promotions of All Employees by EEO Code

	FY21	FY22	FY23
Internal Promotions of EEO Code "Officials and Administrators" Employees			
Internal Promotions of EEO Code "Professionals" Employees			
Internal Promotions of EEO Code "Technicians" Employees			
Internal Promotions of EEO Code "Protective Service Workers" Employees			
Internal Promotions of EEO Code "Paraprofessionals" Employees			
Internal Promotions of EEO Code "Administrative Support" Employees			
Internal Promotions of EEO Code "Skilled Craft Workers" Employees			
Internal Promotions of EEO Code "Service/Maintenance" Employees			
Internal Promotions of EEO Code "Faculty" Employees			
Internal Promotions of EEO Code "Other" Employees			

2. Enter the internal promotions for each EEO Code.

Internal Promotions of All Employees by Classification

	FY21	FY22	FY23
Classified Employees Internal Promotions			
Wage Employees Internal Promotions			
Agency Head Employees Internal Promotions			

3. Enter the internal promotions for each classification.

Internal Promotions of All Employees in Critical Roles

	FY21	FY22	FY23
Internal Promotions of Critical Positions			

4. Enter the internal promotions for critical positions.

Optional) Enter Internal Promotions Demographic Information

To complete this optional step, enter the internal promotions for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency in the green boxes (the same as the average years of service). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

(Optional) Step 1(b-i) and Step 1(b-ii): Leader and Executive Internal Promotions

To complete Step 1(b-i) and Step 1(b-ii) enter the internal promotions for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 1(b), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 1(c): Enter Internal Transfers for All Employees

To complete step 1(c), enter the total internal transfers for all employees by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<u>Internal Transfers of All Employees</u>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Internal Transfers of All Employees			

1. Enter total internal transfers for all employees.

<u>Internal Transfers of All Employees by EEO Code</u>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Internal Transfers of EEO Code "Officials and Administrators" Employees			
Internal Transfers of EEO Code "Professionals" Employees			
Internal Transfers of EEO Code "Technicians" Employees			
Internal Transfers of EEO Code "Protective Service Workers" Employees			
Internal Transfers of EEO Code "Paraprofessionals" Employees			
Internal Transfers of EEO Code "Administrative Support" Employees			
Internal Transfers of EEO Code "Skilled Craft Workers" Employees			
Internal Transfers of EEO Code "Service/Maintenance" Employees			
Internal Transfers of EEO Code "Faculty" Employees			
Internal Transfers of EEO Code "Other" Employees			

2. Enter the internal transfers for each EEO Code.

<u>Internal Transfers of All Employees by Classification</u>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Classified Employees Internal Transfers			
Wage Employees Internal Transfers			
Agency Head Employees Internal Transfers			

3. Enter the internal transfers for each classification.

<u>Internal Transfers of All Employees in Critical Roles</u>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Internal Transfers of Critical Positions			

4. Enter the internal transfers for critical positions.

(Optional) Enter Internal Transfers Demographic Information

To complete this optional step, enter internal transfers for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency in the green boxes (the same as the average years of service). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

(Optional) Step 1(c-i) and Step 1(c-ii): Leader and Executive Internal Transfers

To complete Step 1(c-i) and Step 1(c-ii) enter the internal transfers for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 1(c), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 1(d): Enter External Transfers for All Employees

To complete step 1(d), enter the external transfers for all employees by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>External Transfers of All Employees</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
External Transfers of All Employees			

1. Enter total external transfers for all employees.

<i>External Transfers of All Employees by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
External Transfers of EEO Code "Officials and Administrators" Employees			
External Transfers of EEO Code "Professionals" Employees			
External Transfers of EEO Code "Technicians" Employees			
External Transfers of EEO Code "Protective Service Workers" Employees			
External Transfers of EEO Code "Paraprofessionals" Employees			
External Transfers of EEO Code "Administrative Support" Employees			
External Transfers of EEO Code "Skilled Craft Workers" Employees			
External Transfers of EEO Code "Service/Maintenance" Employees			
External Transfers of EEO Code "Faculty" Employees			
External Transfers of EEO Code "Other" Employees			

2. Enter the external transfers for each EEO Code.

<i>External Transfers of All Employees by Classification</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Classified Employees External Transfers			
Wage Employees External Transfers			
Agency Head Employees External Transfers			

3. Enter the external transfers for each classification.

<i>External Transfers of All Employees in Critical Roles</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
External Transfers of Critical Positions			

4. Enter the external transfers for critical positions.

Optional) Enter External Transfers Demographic Information

To complete this optional step, enter external transfers for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency in the green boxes (the same as the average years of service). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

(Optional) Step 1(d-i) and Step 1(d-ii): Leader and Executive External Transfers

To complete Step 1(d-i) and Step 1(d-ii) enter the external transfers for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 1(d), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 1(e): Enter Voluntary Separations for All Employees

To complete step 1(e), enter the voluntary separations for all employees by EEO Code, classification, and critical roles in the yellow boxes (shown in the picture below). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

<i>Voluntary Separations of All Employees</i>			
	FY21	FY22	FY23
Voluntary Separations of All Employees			

1. Enter total voluntary separations for all employees.

<i>Voluntary Separations of All Employees by EEO Code</i>			
	FY21	FY22	FY23
Voluntary Separations of EEO Code "Officials and Administrators" Employees			
Voluntary Separations of EEO Code "Professionals" Employees			
Voluntary Separations of EEO Code "Technicians" Employees			
Voluntary Separations of EEO Code "Protective Service Workers" Employees			
Voluntary Separations of EEO Code "Paraprofessionals" Employees			
Voluntary Separations of EEO Code "Administrative Support" Employees			
Voluntary Separations of EEO Code "Skilled Craft Workers" Employees			
Voluntary Separations of EEO Code "Service/Maintenance" Employees			
Voluntary Separations of EEO Code "Faculty" Employees			
Voluntary Separations of EEO Code "Other" Employees			

2. Enter the voluntary separations for each EEO Code.

<i>Voluntary Separations of All Employees by Classification</i>			
	FY21	FY22	FY23
Classified Employees Voluntary Separations			
Wage Employees Voluntary Separations			
Agency Head Employees Voluntary Separations			

3. Enter the voluntary separations for each classification.

<i>Voluntary Separations of All Employees in Critical Roles</i>			
	FY21	FY22	FY23
Voluntary Separations of Critical Positions			

4. Enter the voluntary separations for critical positions.

(Optional) Enter Voluntary Separations Demographic Information

To complete this optional step, enter voluntary separations for each gender, race, and additional demographics (individuals with disabilities and veterans) at the agency in the green boxes (the same as the average years of service). Please note, classifications are unique to the Agency. The classifications below are to provide an example only.

(Optional) Step 1(e-i) and Step 1(e-ii): Leader and Executive Voluntary Separations

To complete Step 1(e-i) and Step 1(e-ii) enter the voluntary separations for leader and executive positions at the agency by EEO Code, classification, critical roles and demographics using the same procedures as step 1(e), with the exception of entering the information in the green boxes instead of yellow (as the information is optional).

Step 2: Enter Retention Information for Employees in their First Five Years

If the HuRman or Cardinal Transaction Report was used, the information from the report can be directly imported using the "Import Data from Other Sources" steps outlined in the Getting Started Tab section. The transaction codes are identified as either internal promotion, internal

transfer, external transfer or voluntary separation based on the categorization map in the Agency Profile.

Using the 2 step process to import the information will identify the respective metrics for employees within their first five years, and employees in their first year. This information is broken down for all employees, leaders, and executives by EEO code, classification, critical roles and demographics. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective retention information manually.

Step 2(a): Enter Total Employees within First Five Years

To complete step 2(a), enter the total number of employees in their first five years at the agency and the total number of employees in their first five years at the agency by EEO Code in the yellow boxes (shown in the picture below).

<i>Total Employees in First Five Years</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Number of Employees in First Five Years			

<i>Total Employees in First Five Years by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total EEO Code "Officials and Administrators" in First Five Years			
Total EEO Code "Professionals" in First Five Years			
Total EEO Code "Technicians" in First Five Years			
Total EEO Code "Protective Service Workers" in First Five Years			
Total EEO Code "Paraprofessionals" in First Five Years			
Total EEO Code "Administrative Support" in First Five Years			
Total EEO Code "Skilled Craft Workers" in First Five Years			
Total EEO Code "Service/Maintenance" in First Five Years			
Total EEO Code "Faculty" in First Five Years			
Total EEO Code "Other" in First Five Years			

1. Enter the total number of employees in their first five years.

2. Enter the total number of employees in their first five years for each EEO code.

Step 2(a)-Step 2(e): Enter Total Employees within First Five Years

To complete the remaining steps for employees within their first five years, follow the same process used to complete step 1. Step 2 follows the exact same pattern of average years of service, internal promotions, internal transfers, external transfers, and voluntary separations.

Step 3: Enter Retention Information for Employees in their First Year

If the HuRman or Cardinal Transaction Report was used, the information from the report can be directly imported using the "Import Data from Other Sources" steps outlined in the Getting Started Tab section. The transaction codes are identified as either internal promotion, internal transfer, external transfer or voluntary separation based on the categorization map in the Agency Profile.

Using the 2 step process to import the information will identify the respective metrics for employees within their first five years, and employees in their first year. This information is

broken down for all employees, leaders, and executives by EEO code, classification, critical roles and demographics. The information entered should be verified and can be adjusted as needed to ensure numbers are correct.

The following steps can be used to enter the respective retention information manually.

Step 2(a): Enter Total Employees within First Year

To complete step 2(a), enter the total number of employees in their first year at the agency and the total number of employees in their first five years at the agency by EEO Code in the yellow boxes (shown in the picture below).

<i>Total Employees in First Year</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total Number of Employees in First Year			

1. Enter the total number of employees in their first year.

<i>Total Employees in First Year by EEO Code</i>			
	<i>FY21</i>	<i>FY22</i>	<i>FY23</i>
Total EEO Code "Officials and Administrators" in First Year			
Total EEO Code "Professionals" in First Year			
Total EEO Code "Technicians" in First Year			
Total EEO Code "Protective Service Workers" in First Year			
Total EEO Code "Paraprofessionals" in First Year			
Total EEO Code "Administrative Support" in First Year			
Total EEO Code "Skilled Craft Workers" in First Year			
Total EEO Code "Service/Maintenance" in First Year			
Total EEO Code "Faculty" in First Year			
Total EEO Code "Other" in First Year			

2. Enter the total number of employees in their first year for each EEO code.

Step 3(a)-Step 3(e): Enter Total Employees within First Year

To complete the remaining steps for employees within their first \year, follow the same process used to complete step 1 and step 2. Step 3 follows the exact same pattern of average years of service, internal promotions, internal transfers, external transfers, and voluntary separations.

(Optional) Step 4: Enter Engagement Information

To complete Step 4, enter information pertaining to employee engagement, to include the exit surveys, any agency exit or engagement surveys, any engagement events held during the fiscal year and any employee recognition awarded.

(Optional) Step 4(a): Enter Commonwealth of Virginia Exit Survey Results

To complete Step 4(a), enter the total survey participants, net promoter score, percent favorable and percent highly influenced to leave scores for the respective survey categories in the green boxes (shown below).

Reports for the Commonwealth of Virginia Exit Survey can be accessed by select individuals at the Agency or DHRM can run reports for agencies upon request.

<u>Fiscal Year Total Survey Participants</u>			
	FY21	FY22	FY23
Total Survey Participants			

<u>Fiscal Year Survey Net Promoter Score</u>			
	FY21	FY22	FY23
Net Promoter Score			

<u>Job Experience % Favorable</u>			
	FY21	FY22	FY23
Management / Leadership			
Growth Opportunities			
Person / Work Fit			
Work Environment			
Rewards			
Meaningful Work			

<u>Reason For Leaving % Highly Influenced</u>			
	FY21	FY22	FY23
Management / Leadership			
Growth Opportunities			
Person / Work Fit			
Work Environment			
Rewards			

1. Enter the total number of survey participants.

2. Enter the Net Promoter Score for the FY.

3. Enter percent favorable (green) for each survey area.

4. Enter percent of highly influenced to leave (red) percent.

(Optional) Step 4(b): Enter Agency Exit or Engagement Survey Results

To complete Step 4(b), enter the survey title, total survey participants, overall score name and score, and survey area names and percent favorable for either the agency exit survey or agency engagement survey in the green boxes (shown below).

Agency Exit Survey Title

<u>Fiscal Year Total Exit Survey Participants</u>			
	FY21	FY22	FY23
Total Survey Participants			

3. Enter overall score name (such as Net Promoter Score)

<u>Fiscal Year Exit Survey Overall Score (Example: Net Promoter Score)</u>			
	FY21	FY22	FY23

5. Enter Survey Area Names

	FY21	FY22	FY23

6. Enter Favorable Score for each survey category.

1. Enter Survey Title

2. Enter the total number of survey participants.

4. Enter the overall survey score.

6. Enter Favorable Score for each survey category.

NOTE: This process can be repeated to enter the information for both the agency's own exit survey and/or engagement survey.

(Optional) Step 4(c): Enter Agency Engagement Events

To complete Step 4(c), enter the event name, purpose, date held, and attendance by clicking blue button (shown in the pictures below). Up to 15 events can be added.

If Not Using the Excel Macros, Skip to Step 4(c-i)

(Optional) Step 4(c): Enter Agency Engagement Events

INSTRUCTIONS: Please enter any events hosted by the agency to promote employee engagement (such as social events, recognition events, thank you events, etc.). Please enter the name, a very brief description or purpose of the event, the date the event was held and the number of individuals who attended the event by clicking the blue "Add Event" button. Up to 15 events can be added.

1. Click the "Add Engagement Event" to add an event.

Add Engagement Event

Remove Last Engagement Event

Event Name	Very Brief Description / Event Purpose	Date Held	Attendance
Example Event	Example	8/10/2021	10

2. Enter Event Name

3. Enter Description or Purpose

4. Enter Date Held

5. Enter Event Attendance

(Optional) Step 4(c): Enter Agency Engagement Events

INSTRUCTIONS: Please enter any events hosted by the agency to promote employee engagement (such as social events, recognition events, thank you events, etc.). Please enter the name, a very brief description or purpose of the event, the date the event was held and the number of individuals who attended the event by clicking the blue "Add Event" button. Up to 15 events can be added.

Add Engagement Event

Remove Last Engagement Event

Click to Remove Last Event Added

Event Name	Very Brief Description / Event Purpose	Date Held	Attendance
Example Event	Example	8/10/2021	10

(Optional) Step 4(c-i): Enter Agency Engagement Events without Macros

If the blue buttons were used to add engagement events, this step can be skipped.

In the event Macros are not being used, agency engagement events can be entered by first entering the total number in the green box.

(Optional) Step 4(c-i): Enter Engagement Event if not using Macros

If chosen not to use Macros, please indicate the number of engagement events that should be included. 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 scores for each area in the cells above.

Total Number of Engagement Events

1. Enter the Total Number of Events

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
HOME		AGENCY PROFILE			RECRUITMENT			WORKFORCE DEVELOPMENT			AGENCY STRATEGY									
GETTING STARTED		CONTINUITY OF OPERATIONS			RETENTION & ENGAGEMENT			FUTURE DIRECTION			WF PLANNING SUMMARY									



2. Click the filter Icon to show filter menu

INSTRUCTIONS: Please enter any events hosted by the agency to promote employee engagement (such as social events, recognition events, thank you events, etc.). Please enter the name, a very brief description or purpose of the event, the date the event was held and the number of individuals who attended the event by clicking the blue "Add Event" button. Up to 15 events can be added.

Add Engagement Event

Remove Last Engagement Event

Event Name	Very Brief Description / Event Purpose	Date Held	Attendance
Example Event	Example	8/10/2021	10



(Optional) Step 4(d): Enter Employee Recognition

To complete Step 4(d), select the recognition type from the dropdown that best aligns with the recognition or select other, enter the recognition type if other is selected, a brief description of the recognition and the number of employees recognized by clicking the blue button and entering the information in the green boxes (shown in the pictures below). Up to 20 recognition items can be added.

If Not Using the Excel Macros, Skip to Step 4(d-i)

(Optional) Step 4(d): Enter Employee Recognition

INSTRUCTIONS: Please enter any types of recognition used at the agency during the reporting fiscal year. Please enter the recognition type from the dropdown menu, enter a brief name if other, a very brief description of the recognition or award and the number of individuals who have been recognized with the award by clicking the "Add Recognition Item" blue button. Up to 20 recognition items can be added.

1. Click the "Add Recognition Item" to add recognition.

Recognition Type	If Other, Enter Type/Name	Very Brief Description of Recognition / Award	Number Recognized
Recognition Leave		Example	5
Other	Recognition Bonus	Example	1

- 2. Select Recognition Type**
- 3. Enter Type if "Other"**
- 4. Enter Description of Award**
- 5. Enter Number of Employees Recognized**

(Optional) Step 4(d): Enter Employee Recognition

INSTRUCTIONS: Please enter any types of recognition used at the agency during the reporting fiscal year. Please enter the recognition type from the dropdown menu, enter a brief name if other, a very brief description of the recognition or award and the number of individuals who have been recognized with the award by clicking the "Add Recognition Item" blue button. Up to 20 recognition items can be added.

Click to Remove Last Recognition Item Added

Recognition Type	If Other, Enter Type/Name	Very Brief Description of Recognition / Award	Number Recognized
Recognition Leave		Example	5
Other	Recognition Bonus	Example	1



(Optional) Step 4(d-i): Enter Employee Recognition without Macros

If the blue buttons were used to add recognition items, this step can be skipped.

In the event Macros are not being used, agency recognition items can be entered by first entering the total number in the green box.

(Optional) Step 4(d-i): Enter Employee Recognition if not using Macros

If chosen not to use Macros, please indicate the number of employee recognition items that should be included. 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 scores for each area in the cells above.

Total Number of Employee Recognition Items

1. Enter the Total Number of Recognition Items

(Optional) Step 4(d): Enter Employee Recognition

INSTRUCTIONS: Please enter any types of recognition used at the agency during the reporting fiscal year. Please enter the recognition type from the dropdown menu, enter a brief name if other, a very brief description of the recognition or award and the number of individuals who have been recognized with the award by clicking the "Add Recognition Item" blue button. Up to 20 recognition items can be added.

Recognition Type	If Other, Enter Type/Name	Very Brief Description of Recognition / Award	Number Recognized
Recognition Leave		Example	5
Other	Recognition Bonus	Example	1

(Optional) Step 4(d-i): Enter Employee Recognition if not using Macros

If chosen not to use Macros, please indicate the number of employee recognition items that should be included. 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 scores for each area in the cells above.

Total Number of Employee Recognition Items

2. Click the filter Icon to show filter menu

(Optional) Step 4(d): Enter Employee Recognition

INSTRUCTIONS: Please enter any types of recognition used at the agency during the reporting fiscal year. Please enter the recognition type from the dropdown menu, enter a brief name if other, a very brief description of the recognition or award and the number of individuals who have been recognized with the award by clicking the "Add Recognition Item" blue button. Up to 20 recognition items can be added.

Recognition Type	If Other, Enter Type/Name	Very Brief Description of Recognition / Award	Number Recognized
Recognition Leave		Example	5
Other	Recognition Bonus	Example	1

(Optional) Step 4(d-i): Enter Employee Recognition if not using Macros

If chosen not to use Macros, please indicate the number of employee recognition items that should be included. 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 scores for each area in the cells above.

Total Number of Employee Recognition Items

3. Verify "0" is unchecked

4. Click Ok

(Optional Use): Workforce Insights Section

The workforce insights section provides a brief review of the information entered above to assist with interpreting retention and engagement information that can help with completing the remaining steps. To adjust the graphics, select a fiscal year, demographic group, and years of service group from the drop down menus in the yellow boxes.

Select Items Below to Change Graphics:

Fiscal Year:	FY22
Demographic:	ALL
Years of Service Group:	All Employees

1. Click on the yellow box to show the dropdown arrow. Click the dropdown arrow to select a different group.

Optional information can also be viewed or hidden within the workforce insights section by clicking the respective blue button (example shown below) to show or hide the respective section.



Step 5: Complete a SWOT Analysis

To complete Step 5, enter a brief, high level, description of the items in each respective category (Strengths, Weaknesses, Opportunities, and Threats) for the area of retention and engagement in the yellow box beneath the respective category.

NOTE: See the SWOT help feature for additional information on the different categories.



Click for Help if needed

Step 5: Complete a SWOT Analysis Incomplete

INSTRUCTIONS: 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 SWOT analysis. Enter a brief, high level, description of the items in each respective category for each area of the analysis. Use the check box beneath each category if there is nothing to enter.

Step 5(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 meet the agency's retention and engagement needs.



1. Enter the description for the SWOT analysis area in the yellow box.

Check box if there is nothing to enter for this category.

If there is nothing to enter for the respective SWOT Analysis category, the checkbox in the blue bar beneath the yellow can be selected. This will gray out the area for the respective SWOT Analysis area.

Step 5(a): Enter Agency Strengths

Complete

Strengths are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **ENHANCE** an Agency's ability to meet the agency's retention and engagement needs.

<input checked="" type="checkbox"/> Check box if there is nothing to enter for this category.

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 agency strategy template is imported.**



<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.



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

Repeat this process for each of the areas of the SWOT Analysis.

Step 6: Overall Retention and Engagement Risk and Agency Preparedness

To complete step 6, identify the overall risk level and agency preparedness level regarding the retention and engagement by entering the specific level of risk and preparedness. After, enter a brief description of the agency needs to address any gaps between the risk and preparedness level or to maintain the current level of preparedness.

Step 6(a): Identify Retention and Engagement Risk

To complete Step 6(a), enter a number between 1 and 100 to indicate the level of risk and click enter. The graphic will then be updated to show the respective level of risk. Continue to adjust the risk number until the chart displays the correct level of risk to the agency.

Step 6(b): Identify Retention and Engagement Preparedness

To complete Step 6(b), use the same procedure as Step 6(a) to identify the agency preparedness level related to retention and engagement.

Step 6(c): Identify Agency Needs to Address Gap or Maintain Preparedness Level

To complete Step 6(c), enter a brief description of the agency needs to address any gaps between the risk level and preparedness level identified for retention and engagement, or to maintain the current preparedness level in the yellow box (shown in the picture below).

Step 6(c): Agency Needs to Address Gap or Maintain Preparedness Level

Incomplete

INSTRUCTIONS: In the event the risk level exceeds the preparedness level, please provide a brief description in the yellow box below of the agency needs in order to address the gap between the retention and engagement risk level and preparedness. If the preparedness level is higher than the risk level, please provide a brief description of how the agency can maintain the higher preparedness level.

1. Enter the description for the needs to address gaps or maintain preparedness.



(Optional) Step 7: 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 7: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue "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

Workforce Development Tab

The Workforce Development Tab focuses on answering the question “how does the agency develop its workforce?” by providing agencies the ability to explore the impacts of development initiatives. Specifically, agencies explore initiatives related to critical roles, executive positions, to address upcoming retirements, or any other agency practices that support the development of employees.

(Optional) Step: Adjust Data Visibility as Needed

To assist with data entry and for ease of use, in-depth and comprehensive levels of analysis data elements (which are optional) can have their visibility toggled to prevent having to continually scroll between different elements.

To change the visibility, select visible or hidden from the dropdown menu next to the respective data element for the In-Depth and Comprehensive elements. **All items are visible by default but can be changed between visible or hidden at anytime**

FOUNDATIONAL
Visibility Cannot Be Changed
Internship Information **Visible**

IN-DEPTH
Select either Visible or Hidden
Internship Details **Visible**
Workforce Development Details **Visible**
Critical Roles Development Details **Visible**
Development to Address Retirements **Visible**
Executive Development **Visible**
Development Support **Visible**

COMPREHENSIVE
Select either Visible or Hidden
Development Demographics **Visible**

1. Click Cell to Show Dropdown and Select

FOUNDATIONAL
Visibility Cannot Be Changed
Internship Information **Visible**

IN-DEPTH
Select either Visible or Hidden
Internship Details **Visible**
Workforce Development Details **Visible**
Critical Roles Development Details **Visible**
Development to Address Retirements **Visible**
Executive Development **Visible**
Development Support **Visible**

COMPREHENSIVE
Select either Visible or Hidden
Development Demographics **Hidden**

Each time the visibility of data elements are changed, the tab will need to be refreshed. If the tab needs to be refreshed, the indicator will display “Need to Refresh Visibility”. The tab can be refreshed by clicking the blue “Click to Refresh Data Entry Visibility” button. After, the indicator will say “All Selected Data Elements are Visible”.

Need to Refresh Visibility.

Click to Refresh Data Entry Visibility

1. Click to Refresh Tab

All Selected Data Elements are Visible.

Click to Refresh Data
Entry Visibility

If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

Step 1: Enter Internship Information

Please enter information pertaining to any internships offered at the Agency. If the agency did provide a formal internship, please provide additional details regarding the internship. Agencies can also provide participant demographics for the internship program.

Step 1(a): Enter Internship Information

To complete step 1(a), enter the internship information indicating if the agency employed interns, the number of interns at the agency, the number of interns that participated in paid internships from agency funds, those that participated in paid internships from outside sources, those who participated in unpaid internships and those that received academic credit for their internships in the yellow boxes (shown in the picture below).

	Agency Internship Information		
	FY21	FY22	FY23
Did the Agency employ interns in the reporting fiscal year?			
How many individuals were in internship roles at the agency?			
How many individuals participated in paid internships supported by agency funds?			
How many individuals participated in paid-internships supported by outside resources/funds (scholarships, grants, etc.)?			
How many individuals participated in unpaid internships (not compensated monetarily in any way)?			
How many unpaid interns received academic credit?			

1. Enter the respective information regarding internships.

(Optional) Step 1(b): Formal Internship Program Details

To complete step 1(b), click the blue “add internship” button and enter the information for the internship program. Participant demographic can also be added for the internship. Up to 5 different internship programs can be added.

IN-DEPTH

(Optional) Step 1(b): Formal Internship Program Details

Complete

INSTRUCTIONS: If the agency provided a formal internship program, please provide details of the internship by clicking the blue "Add Internship" button and entering the information in the yellow boxes. Up to 5 different internship programs can be added.

Add Internship

Remove Last
Internship

1. Click to add Internship Program Details

Enter the required information for the internship program, noted in the yellow boxes below.

Internship 1 Information

Incomplete

Internship Title or Name	<input type="text"/>
Is the Internship Paid or Unpaid	<input type="text"/>
Internship Funding Source	<input type="text"/>
If Other	<input type="text"/>
Total Internship Participants	<input type="text"/>
Internship Description (structure, topics covered, work performed, etc.)	<input type="text"/>
Potential or Observed Impacts Internship	<input type="text"/>

1. Enter the internship name
2. Select Paid/ Unpaid and Funding Source
3. Enter Total Participants
4. Enter a description of the internship program and any impacts.

Demographics of participants can also be entered in the green boxes (shown below) but are optional to include.

Internship 1 Participant Gender

	FY21	FY22	FY23
Male	<input type="text"/>	<input type="text"/>	<input type="text"/>
Female	<input type="text"/>	<input type="text"/>	<input type="text"/>

Internship 1 Participant Race

	FY21	FY22	FY23
American Indian or Alaskan Native	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asian	<input type="text"/>	<input type="text"/>	<input type="text"/>
Black or African American	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hispanic or Latino	<input type="text"/>	<input type="text"/>	<input type="text"/>
Native Hawaiian or Other Pac. Islander	<input type="text"/>	<input type="text"/>	<input type="text"/>
White	<input type="text"/>	<input type="text"/>	<input type="text"/>
Two or More Races	<input type="text"/>	<input type="text"/>	<input type="text"/>
Race Unknown or not Entered	<input type="text"/>	<input type="text"/>	<input type="text"/>

Additional Demographics of Internship 1 Participants

	FY21	FY22	FY23
Individuals with Disabilities	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterans	<input type="text"/>	<input type="text"/>	<input type="text"/>

1. Enter number of participants for each gender
2. Enter number of participants for each race
3. Enter number of participants for the additional demographics

Add Internship

Remove Last Internship

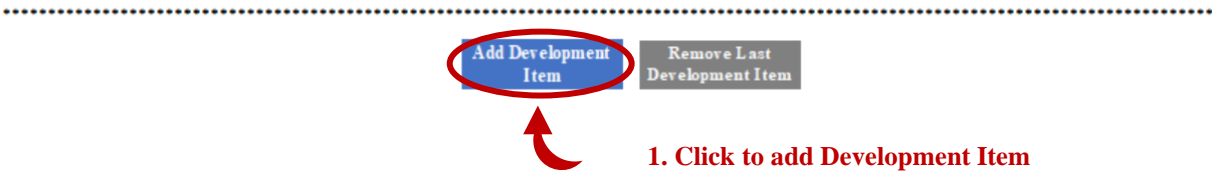
Click to Remove Last Internship Program Details Added

(Optional) Step 2: Enter Workforce Development Information

To complete step 2, enter any workforce development items that took place during the reporting fiscal year. Workforce development items should reflect professional development or growth opportunities that support an employee’s ability to take on or complete additional responsibilities, gain additional knowledge to support specific agency initiatives, or to prepare for a higher level position.

If any workforce development items were specifically designed to address elements related to critical roles, retirements, or executive development, please enter that information in steps 3 through 5.

To enter workforce development items, click the blue “Add development item” button (shown in the picture below) and enter the development item name, select if it was internal or external to the agency, select the delivery method, enter the total number of participants, the purpose and any impacts in the yellow boxes (shown below). Up to 10 development items can be added.



A screenshot of a form titled "Development Item 1" with a red "Incomplete" status indicator. The form contains several input fields: "Development Item Name", "Internal or External to the Agency", "Delivery Method", and "Total Number of Participants". Below these are two large yellow text areas for "Purpose, Development Types Included, or Key Learnings from" and "Potential or Observed Impacts from Development". Red arrows point to each field with instructions: "1. Enter the development item name", "2. Select internal/external and delivery method", "3. Enter Total Participants", and "4. Enter Purpose and Impacts".

Demographics of participants can also be entered in the green boxes (similar to the prior tabs) but are optional to include. Please note, classifications are unique to the Agency. The classifications below are to provide an example only.



(Optional) Step 2(a): Enter Development Items without Macros

If the blue buttons were used to add development items, this step can be skipped.

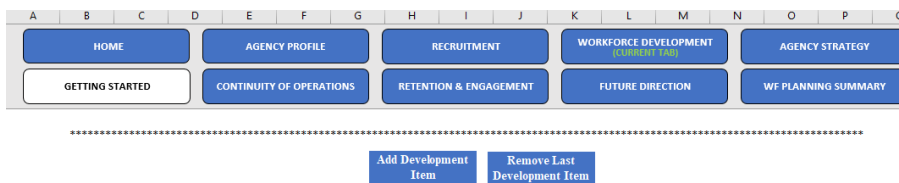
In the event Macros are not being used, agency development items can be entered by first entering the total number in the green box.

(Optional) Step 2(a): Enter Workforce Development Information if not using Macros

If chosen not to use Macros, please indicate the number workforce development items that should be included. 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 information for each area in the cells above.

Total Workforce Development Items

1. Enter the Total Number of Development Items

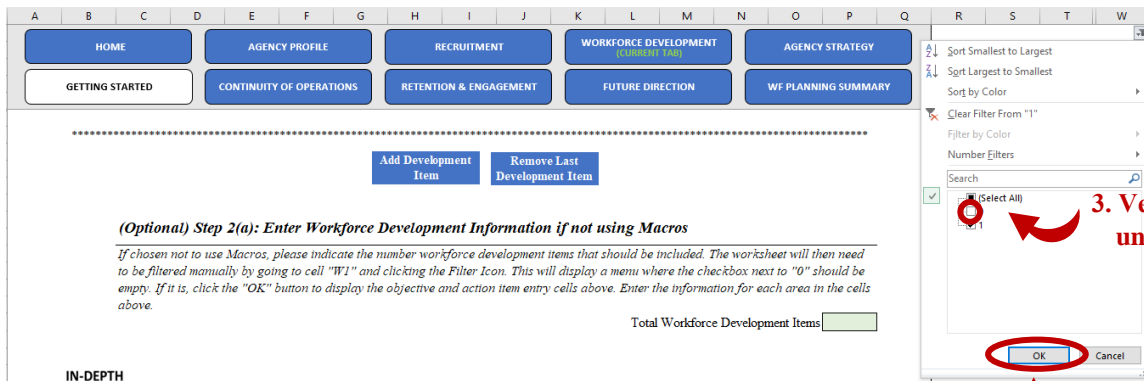


2. Click the filter Icon to show filter menu

(Optional) Step 2(a): Enter Workforce Development Information if not using Macros

If chosen not to use Macros, please indicate the number workforce development items that should be included. 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 information for each area in the cells above.

Total Workforce Development Items



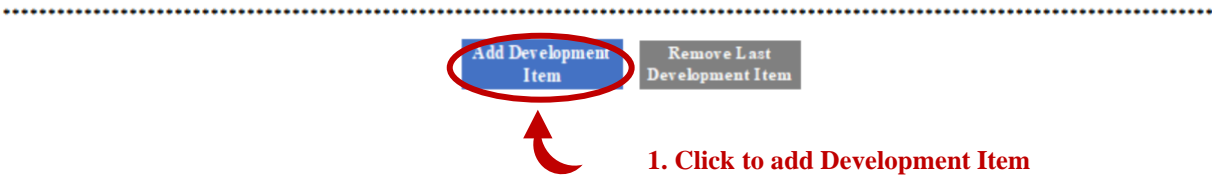
3. Verify "0" is unchecked

4. Click Ok

(Optional) Step 3: Enter Workforce Development Information Specific to Critical Roles

To complete step 3, enter any workforce development items specific to critical roles that took place during the reporting fiscal year. Workforce development items should reflect professional development or growth opportunities that support an employee’s ability to take on or complete additional responsibilities, gain additional knowledge to support specific agency initiatives, or to prepare for a higher level position.

To enter workforce development items, click the blue “Add development item” button (shown in the picture below) and enter the development item name, select if it was internal or external to the agency, select the delivery method, enter the total number of participants, the purpose and any impacts in the yellow boxes (shown below). Up to 5 development items specific to critical roles can be added.



Development Item 1 Incomplete

Development Item Name

Internal or External to the Agency

Delivery Method

Total Number of Participants

Purpose, Development Types Included, or Key Learnings from

Potential or Observed Impacts from Development

1. Enter the development item name

2. Select internal/external and delivery method

3. Enter Total Participants

4. Enter Purpose and Impacts



(Optional) Step 3(a): Enter Development Items specific to critical roles without Macros
If the blue buttons were used to add development items specific to critical roles, this step can be skipped.

In the event Macros are not being used, agency development items specific to critical roles can be entered by first entering the total number in the green box.

(Optional) Step 3(a): Enter Workforce Development Information for Critical Roles if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for critical roles and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

1. Enter the Total Number of Development Items

2. Click the filter Icon to show filter menu

Add Development Item Remove Last Development Item

(Optional) Step 3(a): Enter Workforce Development Information for Critical Roles if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for critical roles and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

3. Verify "0" is unchecked

4. Click Ok

Add Development Item Remove Last Development Item

(Optional) Step 3(a): Enter Workforce Development Information for Critical Roles if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for critical roles and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

(Optional) Step 4: Enter Workforce Development Information for Retirements

To complete step 3, enter any workforce development items for retirements that took place during the reporting fiscal year. Workforce development items should reflect professional development or growth opportunities that support an employee’s ability to take on or complete additional responsibilities, gain additional knowledge to support specific agency initiatives, or to prepare for a higher level position.

To enter workforce development items, click the blue “Add development item” button (shown in the picture below) and enter the development item name, select if it was internal or external to the agency, select the delivery method, enter the total number of participants, the purpose and any impacts in the yellow boxes (shown below). Up to 5 development items for retirements can be added.

1. Click to add Development Item

Development Item 1

Incomplete

Development Item Name

Internal or External to the Agency

Delivery Method

Total Number of Participants

Purpose, Development Types Included, or Key Learnings from

Potential or Observed Impacts from Development

1. Enter the development item name
2. Select internal/external and delivery method
3. Enter Total Participants
4. Enter Purpose and Impacts

.....

Click to Remove Last Development Item Added

(Optional) Step 4(a): Enter Development Items for retirements without Macros

If the blue buttons were used to add development items for retirements, this step can be skipped.

In the event Macros are not being used, agency development items for retirements can be entered by first entering the total number in the green box.

(Optional) Step 4(a): Enter Workforce Development Information for Retirements if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for retirements and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

1. Enter the Total Number of Development Items

A B C D E F G H I J K L M N O P Q R S T

HOME AGENCY PROFILE RECRUITMENT WORKFORCE DEVELOPMENT (CURRENT TAB) AGENCY STRATEGY

GETTING STARTED CONTINUITY OF OPERATIONS RETENTION & ENGAGEMENT FUTURE DIRECTION WF PLANNING SUMMARY

retirements. Up to 5 items can be added.

2. Click the filter icon to show filter menu

(Optional) Step 4(a): Enter Workforce Development Information for Retirements if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for retirements and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

3. Verify "0" is unchecked

4. Click Ok

(Optional) Step 5: Enter Workforce Development Information for Executives

To complete step 3, enter any workforce development items for executives that took place during the reporting fiscal year. Workforce development items should reflect professional development or growth opportunities that support an employee’s ability to take on or complete additional responsibilities, gain additional knowledge to support specific agency initiatives, or to prepare for a higher level position.

To enter workforce development items, click the blue “Add development item” button (shown in the picture below) and enter the development item name, select if it was internal or external to the agency, select the delivery method, enter the total number of participants, the purpose and any impacts in the yellow boxes (shown below). Up to 5 development items for executives can be added.

1. Click to add Development Item

1. Enter the development item name

2. Select internal/external and delivery method

3. Enter Total Participants

4. Enter Purpose and Impacts

Add Development Item

Remove Last Development Item

Click to Remove Last Development Item Added

(Optional) Step 5(a): Enter Development Items for executives without Macros

If the blue buttons were used to add development items for executives, this step can be skipped.

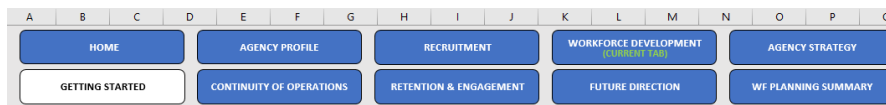
In the event Macros are not being used, agency development items for executives can be entered by first entering the total number in the green box.

(Optional) Step 5(a): Enter Workforce Development Information for Executives if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for executives and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items

1. Enter the Total Number of Development Items



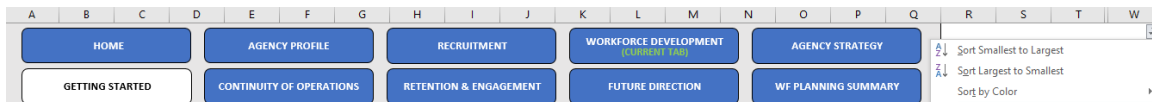
2. Click the filter icon to show filter menu

Add Development Item Remove Last Development Item

(Optional) Step 5(a): Enter Workforce Development Information for Executives if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for executives and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items



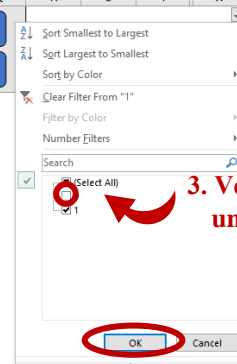
3. Verify "0" is unchecked

Add Development Item Remove Last Development Item

(Optional) Step 5(a): Enter Workforce Development Information for Executives if not using Macros

If chosen not to use Macros, please indicate the number workforce development items for executives and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Items



4. Click Ok

Optional) Step 6: Enter Workforce Development Support Information

To complete step 3, enter any workforce development support items that took place during the reporting fiscal year. Workforce development items should reflect professional development or growth opportunities that support an employee’s ability to take on or complete additional responsibilities, gain additional knowledge to support specific agency initiatives, or to prepare for a higher level position.

To enter workforce development items, click the blue “Add development item” button (shown in the picture below) and enter the development item name, select if it was internal or external to the agency, select the delivery method, enter the total number of participants, the purpose and any impacts in the yellow boxes (shown below). Up to 5 development support items.

IN-DEPTH



Step 6: Enter Workforce Development Support Information

Complete

INSTRUCTIONS: Please enter any information pertaining to how the agency supports the development of employees, such as providing funding for professional development opportunities, that was used during the reporting fiscal year. Up to 5 support items can be added.



1. Click to add Development Support Item

Development Support Item 1

Incomplete

1. Enter the development support item name

Development Support Item Name
Total Number of Participants / Employees who utilized Support Item

2. Enter Total Participants

Support Item Description

Potential or Observed Impacts from Support Development Item

3. Enter a description and impacts

Demographics of participants of the support items can also be entered in the green boxes (prior to the other tabs) but are optional to include. Please note, classifications are unique to the Agency. The classifications below are to provide an example only.



Click to Remove Last Development Support Item Added

(Optional) Step 6(a): Enter Development support items without Macros

If the blue buttons were used to add development support items, this step can be skipped.

In the event Macros are not being used, agency development support items can be entered by first entering the total number in the green box.

(Optional) Step 6(a): Enter Workforce Development Support Information if not using Macros

If chosen not to use Macros, please indicate the number workforce development support items and if the participant demographics should be included. 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 information for each area in the cells above.

Total Workforce Development Support Items

1. Enter the Total Number of Development Support Items

The screenshot shows a software interface with a grid of navigation buttons: HOME, AGENCY PROFILE, RECRUITMENT, WORKFORCE DEVELOPMENT (CURRENT TAB), AGENCY STRATEGY, GETTING STARTED, CONTINUITY OF OPERATIONS, RETENTION & ENGAGEMENT, FUTURE DIRECTION, and WF PLANNING SUMMARY. Below these are 'Add Development Support Item' and 'Remove Last Support Item' buttons. A text input field labeled 'Total Workforce Development Support Items' is present. A red circle highlights a filter icon in the top right corner of the interface.

2. Click the filter Icon to show filter menu

This screenshot shows the same software interface as above, but with a filter menu open. The menu includes options like 'Sort Smallest to Largest', 'Sort Largest to Smallest', 'Sort by Color', 'Clear Filter From "1"', 'Filter by Color', and 'Number Filters'. A search bar is also visible. A red circle highlights the '0' checkbox in the filter menu, which is currently unchecked. Below the filter menu, the 'OK' button is circled in red.

3. Verify "0" is unchecked

4. Click Ok

Optional Use): Workforce Insights Section

The workforce insights section provides a brief review of the information entered above to assist with interpreting workforce development information that can help with completing the remaining steps.


Optional information can also be viewed or hidden within the workforce insights section by clicking the respective blue button (example shown below) to show or hide the respective section.



Step 7: Complete a SWOT Analysis

To complete Step 7, enter a brief, high level, description of the items in each respective category (Strengths, Weaknesses, Opportunities, and Threats) for the area of retention and engagement in the yellow box beneath the respective category.

NOTE: See the [SWOT help feature](#) for additional information on the different categories.

 **Step 5: Complete a SWOT Analysis** Incomplete

INSTRUCTIONS: 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 SWOT analysis. Enter a brief, high level, description of the items in each respective category for each area of the analysis. Use the check box beneath each category if there is nothing to enter.

Click for Help if needed

Step 5(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 meet the agency's retention and engagement needs.*

1. Enter the description for the SWOT analysis area in the yellow box.

Check box if there is nothing to enter for this category.

If there is nothing to enter for the respective SWOT Analysis category, the checkbox in the blue bar beneath the yellow can be selected. This will gray out the area for the respective SWOT Analysis area.

Step 5(a): Enter Agency Strengths Complete

*Strengths are elements **INTERNAL** to the Agency (defined as being within the control of the Agency) that **ENHANCE** an Agency's ability to meet the agency's retention and engagement needs.*

Check box if there is nothing to enter for this category.

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 agency strategy template is imported.**


Click the magnifying glass icon to show prior year responses.

<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.


Click the magnifying glass icon to hide prior year responses.

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

Repeat this process for each of the areas of the SWOT Analysis.

Step 8: Overall Workforce Development Risk and Agency Preparedness

To complete step 8, identify the overall risk level and agency preparedness level regarding the workforce development by entering the specific level of risk and preparedness. After, enter a brief description of the agency needs to address any gaps between the risk and preparedness level or to maintain the current level of preparedness.

Step 8(a): Identify Workforce Development Risk

To complete Step 8(a), enter a number between 1 and 100 to indicate the level of risk and click enter. The graphic will then be updated to show the respective level of risk. Continue to adjust the risk number until the chart displays the correct level of risk to the agency.

Step 8(b): Identify Retention and Engagement Preparedness

To complete Step 8(b), use the same procedure as Step 8(a) to identify the agency preparedness level related to workforce development.

Step 8(c): Identify Agency Needs to Address Gap or Maintain Preparedness Level

To complete Step 8(c), enter a brief description of the agency needs to address any gaps between the risk level and preparedness level identified for workforce development, or to maintain the current preparedness level in the yellow box (shown in the picture below).

Step 9(c): Agency Needs to Address Gap or Maintain Preparedness Level

Incomplete

INSTRUCTIONS: In the event the risk level exceeds the preparedness level, please provide a brief description in the yellow box below of the agency needs in order to address the gap between the workforce development risk level and preparedness. If the preparedness level is higher than the risk level, please provide a brief description of how the agency can maintain the higher preparedness level.

- 1. Enter the description for the needs to address gaps or maintain preparedness.**



(Optional) Step 9: 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 7: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue “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**

Future Direction Tab

The Future Direction tab examines past workforce trends but also includes the future direction of the agency by classifying the strategic objectives or action items in the Agency Profile Template to each of the workforce planning areas. For each strategic objectives, actions already taken and expected impacts are explored. Lastly, agencies identify potential actions needed to bridge the gap between actions taken and expected outcomes.

NOTE: If the Agency Profile was not imported, skip to Step 1(a) to enter the information manually.

Step 1: Identify Impact of Strategic Initiatives to Workforce Planning

If the Agency Profile was imported, the strategic objectives and action items of the Agency will be visible (up to 15).

To complete Step 1, identify any progress towards the respective strategic objective and action items from the Agency Profile and the expected outcomes. Next, classify the objective or actions items into the any or all workforce planning areas it impacts (continuity of operations, recruitment, retention and engagement, and workforce development)

<i>Summary of Progress toward Strategic Objective or Action Items</i>				
<i>Potential or Expected outcomes from Strategic Objective or Action Items</i>				
<i>Select the checkbox for any workforce planning areas this strategic objective or action items impact / are impacted by.</i>				
	<input type="checkbox"/>	Impacts Continuity of Operations	<input type="checkbox"/>	Impacts Recruitment
	<input type="checkbox"/>	Impacts Retention and Engagement	<input type="checkbox"/>	Impacts Workforce Development

1. Enter progress and expected outcomes

2. Select any or all workforce planning areas impact using the checkbox

Repeat this process for all strategic objectives in Step 1.

(Optional) Step 1(a): Identify Impact of Strategic Initiatives without using Macros
If the Agency Profile was imported, this step can be skipped.

In the event Macros are not being used, strategic objectives can be added by entering the total number of objectives and the total number of action items for each objective (shown below).

(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

NOTE: If the Agency Profile Template was not imported (data was manually entered on the Agency Profile Tab), Step 1(a), Enter Agency Strategic Initiatives & Information if Not using Macros must be used.

Total Objective	
Total Action Items for Objective 1	
Total Action Items for Objective 2	
Total Action Items for Objective 3	
Total Action Items for Objective 4	
Total Action Items for Objective 5	
Total Action Items for Objective 6	
Total Action Items for Objective 7	
Total Action Items for Objective 8	
Total Action Items for Objective 9	
Total Action Items for Objective 10	
Total Action Items for Objective 11	
Total Action Items for Objective 12	
Total Action Items for Objective 13	
Total Action Items for Objective 14	
Total Action Items for Objective 15	

1. Enter the Total Number of Strategic Objectives

2. Enter the number of action items for each objective

(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

NOTE: If the Agency Profile Template was not imported (data was manually entered on the Agency Profile Tab), Step 1(a), Enter Agency Strategic Initiatives & Information if Not using Macros must be used.

Total Objectives	
Total Action Items for Objective 1	
Total Action Items for Objective 2	
Total Action Items for Objective 3	
Total Action Items for Objective 4	
Total Action Items for Objective 5	
Total Action Items for Objective 6	
Total Action Items for Objective 7	
Total Action Items for Objective 8	
Total Action Items for Objective 9	
Total Action Items for Objective 10	
Total Action Items for Objective 11	
Total Action Items for Objective 12	
Total Action Items for Objective 13	
Total Action Items for Objective 14	
Total Action Items for Objective 15	

3. Click the filter Icon to show filter menu

(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

NOTE: If the Agency Profile Template was not imported (data was manually entered on the Agency Profile Tab), Step 1(a), Enter Agency Strategic Initiatives & Information if Not using Macros must be used.

Total Objectives	
Total Action Items for Objective 1	
Total Action Items for Objective 2	
Total Action Items for Objective 3	
Total Action Items for Objective 4	
Total Action Items for Objective 5	
Total Action Items for Objective 6	
Total Action Items for Objective 7	
Total Action Items for Objective 8	
Total Action Items for Objective 9	
Total Action Items for Objective 10	
Total Action Items for Objective 11	
Total Action Items for Objective 12	
Total Action Items for Objective 13	
Total Action Items for Objective 14	
Total Action Items for Objective 15	

3. Verify "0" is unchecked

4. Click Ok

Scroll up to then enter the strategic objectives and action items to include and follow the procedure described in Step 1 to complete the step.

Step 2: Identify Top 3 Strategic Objectives per Workforce Planning Area

For each of the workforce planning areas, select the top three strategic objectives from Step 1 that impacts or is impacted by the workforce planning area. This information is showed on the summary to communicate which current strategic objectives are related to the workforce planning area.

To complete Step 2, select the objective for the 1st, 2nd, and 3rd objective dropdown menus by first clicking on the cell and then using the gray dropdown arrow to the right. Only the objectives identified as part of the specific workforce planning area will be displayed.

Step 2: Identify Top 3 Strategic Objectives per Workforce Planning Area Complete

INSTRUCTIONS: Not all current strategic objectives will appear on the workforce planning summary presented to senior leaders. Please identify the top three strategic objectives that impact or are impacted by each workforce planning area to appear of the workforce planning summary.

Step 2(a): Continuity of Operation Top 3 Strategic Objectives Complete

1st Objective	Select Objective
2nd Objective	Select Objective
3rd Objective	Select Objective

1. Select the objective from the dropdown menu

If there are no objectives for the specific area or level, “None” can be selected.

Step 3: Identify Needs by Workforce Planning Area to Meet Strategic Objectives

For each of the workforce planning areas, enter a brief description of the agency needs for each workforce planning area in order to meet the strategic objectives or the top three objectives from Step 1 and Step 2 in the yellow box below the workforce planning area (shown below).

Step 3: Identify Needs by Workforce Planning Area to Meet Strategic Objectives Complete

INSTRUCTIONS: Please identify the agency needs for each workforce planning area to meet the strategic objectives identified to impact or be impacted by the respective area.

Continuity of Operation Needs to Meet Strategic Objectives

1. Enter description of needs

Repeat this process for the remaining workforce planning areas. If no objectives are related to the specific workforce planning area, the yellow box can be left blank.

(Optional) Step 4: 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 7: Check Spelling

INSTRUCTIONS: To check the spelling of items on this tab, please click the blue "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

Agency Strategy Tab


The Agency Strategy tab are the objectives and action items the agency intends to take to address their workforce needs, risks, and preparedness levels.

Optional Use): Workforce Insights Section

The workforce insights section provides a brief review of the information entered from the previous tabs to show the risks and preparedness levels and needs for each of the workforce planning areas.

Step 1: Create an Overall Workforce Strategy

To complete Step 1, create an overall workforce strategy by clicking the blue “Add Objective” button and then entering an overall objective statement in the yellow box (shown below). After, add any specific action items needed to meet the objective by clicking the blue “add action item button”. Up to 5 objectives, with up to 5 action items each, can be added.

 **Step 1: Create An Overall Workforce Strategy** Complete

***INSTRUCTIONS:** Using all previous information in this template, please create a strategic action plan to address the agency's workforce needs, challenges, and strategic priorities. Each item should include an overall objective statement and then specific action items, broken down by the four workforce planning areas (continuity of operations, recruitment, retention and engagement, and workforce development). Objectives can be added by clicking the "Add Objective" button for a total of 5 overall objectives per strategy.*



1. Click to add Objective

Objective 1

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items. Select the workforce planning area the action item corresponds to or select general if it does not relate to any workforce planning area. An objective does not need to have action items for each workforce planning area. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

1. Enter the Objective Statement

Add Action item

Remove Last Action Item

2. Click to add Action Item

Click to remove last Action Item

Repeat this process to add additional objectives and corresponding action items. An objective and all action items can be removed by clicking the “remove last objective” button (shown below).



1. Click to remove last Objective and Action Items

Optional) Step 1(a): Create Overall Workforce Strategy without using Macros

If the blue buttons were used to add objectives and action items, this step can be skipped.

In the event Macros are not being used, strategic objectives can be added by entering the total number of objectives and the total number of action items for each objective (shown below).

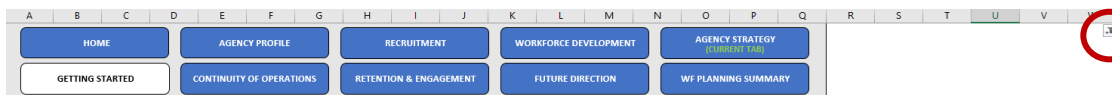
(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

Total Objectives	<input type="text"/>
Total Action Items for Objective	<input type="text"/>
Total Action Items for Objective	<input type="text"/>
Total Action Items for Objective	<input type="text"/>
Total Action Items for Objective	<input type="text"/>
Total Action Items for Objective	<input type="text"/>

1. Enter the Total Number of Strategic Objectives

2. Enter the number of action items for each objective



3. Click the filter Icon to show filter menu

(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

Total Objectives	<input type="text"/>
Total Action Items for Objective 1	<input type="text"/>
Total Action Items for Objective 2	<input type="text"/>
Total Action Items for Objective 3	<input type="text"/>
Total Action Items for Objective 4	<input type="text"/>
Total Action Items for Objective 5	<input type="text"/>

(Optional) Step 1(a): Enter Agency Strategic Initiatives & Information if not using Macros

If chosen not to use Macros, please indicate the number strategic objectives and corresponding action items that should be included. Next, indicate which workforce planning area is impacted by each objective. 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 information for each area in the cells above.

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

(Optional) Step 2: Check Spelling

3. Verify "0" is unchecked

4. Click Ok

Scroll up to then enter the strategic objectives and action items to include and follow the procedure described in Step 1 to complete the step.

(Optional) Step 2: 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 7: Check Spelling

INSTRUCTIONS: *To check the spelling of items on this tab, please click the blue "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

Workforce Planning Summary Tab

The Workforce Plan Summary compiles information from the previous tabs into a single report. It begins with an executive summary and then presents key metrics and information regarding the areas of workforce planning (continuity of operations, recruitment, retention and engagement, and workforce development). The report then presents the agency strategy.

Before viewing the report, it will need to be refreshed by clicking the blue "Click to Refresh Summary Report" if the indicator says "Report needs to be Refreshed. Click the Refresh button to the right". After, the indicator will turn green and say "Report is Up to Date".

Report Needs to be Refreshed. Click the Refresh Button to the Right.

Click to Refresh Summary Report

1. Click to Refresh Report

If not using Macros, the tab will need to be refreshed manually. Go to cell "AA1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

Report is Up to Date.

Click to Refresh
Summary Report

If not using Macros, the tab will need to be refreshed manually. Go to cell "AA1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

Step 1: Complete Workforce Plan Summary Report

To complete Step 1, enter the remaining required information into the respective sections on the report.

Step 1(a): Enter Executive Report Summary

To complete Step 1(a), enter an executive summary in yellow box in the first section of the report. The executive summary can be an overview of the contents of the report, key findings or learnings from the workforce planning process, and key elements of the workforce strategy and how it aligns with the needs or strategic direction of the agency.

Workforce Planning and Development Executive Summary

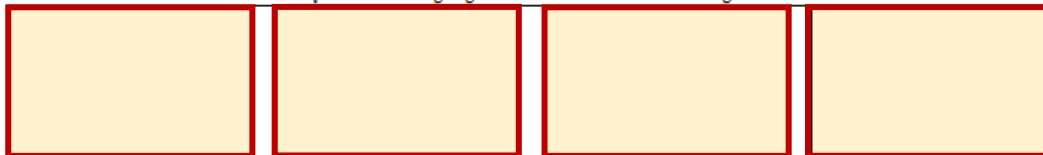


1. Enter the Executive Summary

Step 1(b): Enter Key Findings or Highlights in Agency at a Glance

To complete Step 1(b), enter a very brief 1-2 sentence description of any key highlights that a senior leader should be aware of for each respective workforce planning area.

Key Points and Highlights for Each Workforce Planning Area



1. Enter a description in each box for the respective workforce planning area

Additional Information for each workforce planning area can be found on subsequent pages of this summary report.

Step 1(c): Enter Key Findings for Continuity of Operations

To complete Step 1(c), in the top right corner of the continuity of operations page, enter a more detailed description of any highlights or key information regarding the continuity of operations as a continuation of what was entered in the Agency at a Glance section.

The screenshot shows the 'Continuity of Operations' section. At the top, a blue header contains the title and a descriptive sentence: 'Continuity of Operations focuses on elements that could significantly impact Agency operations, to include critical roles, retirements, and executive risk.' Below this is a risk scale with four categories: LOW (green), MEDIUM (yellow), HIGH (orange), and SIGNIFICANT (red). Two progress bars are shown: 'RISK TO AGENCY' and 'AGENCY PREPAREDNESS'. Below the progress bars are four labels: 'NOT PREPARED' (purple), 'SOMEWHAT PREPARED' (red), 'PREPARED' (yellow), and 'VERY PREPARED' (green). On the right side, a yellow box labeled 'Key Findings and Highlights' is highlighted with a red border and a red arrow pointing to it from the text '1. Enter highlights for continuity of operations'.

Step 1(d): Enter Executive Team Definition

To complete Step 1(d), enter a very brief definition of how the agency defined the executive team for the report in the yellow box on the continuity of operations page.

The screenshot shows the 'Executive Team Risk' section. A blue header contains the title and a descriptive sentence: 'Agency Executive Team Definition'. Below this is a yellow box labeled 'Agency Executive Team Definition' which is highlighted with a red border and a red arrow pointing to it from the text '1. Enter executive team definition'.

Step 1(e): Enter Key Findings for Recruitment

To complete Step 1(e), in the top right corner of the recruitment page, enter a more detailed description of any highlights or key information regarding the recruitment as a continuation of what was entered in the Agency at a Glance section.

The screenshot shows the 'Recruitment' section. At the top, a blue header contains the title and a descriptive sentence: 'Recruitment focuses on elements related to applicant and hiring trends at the Agency, to include applicants to the agency, hires, time to fill, and filled and vacant positions.' Below this is a risk scale with four categories: LOW (green), MEDIUM (yellow), HIGH (orange), and SIGNIFICANT (red). Two progress bars are shown: 'RISK TO AGENCY' and 'AGENCY PREPAREDNESS'. Below the progress bars are four labels: 'NOT PREPARED' (purple), 'SOMEWHAT PREPARED' (red), 'PREPARED' (yellow), and 'VERY PREPARED' (green). On the right side, a yellow box labeled 'Key Findings and Highlights' is highlighted with a red border and a red arrow pointing to it from the text '1. Enter highlights for recruitment'.

Step 1(f): Enter Key Findings for Retention and Engagement

To complete Step 1(f), in the top right corner of the retention and engagement page, enter a more detailed description of any highlights or key information regarding the retention and engagement as a continuation of what was entered in the Agency at a Glance section.

Retention & Engagement | *Retention and Engagement focuses on understanding how employees move within or out of the agency, how long they serve the agency, and their experience at the agency.*

LOW MEDIUM HIGH SIGNIFICANT

RISK TO AGENCY

AGENCY PREPAREDNESS

NOT PREPARED SOMEWHAT PREPARED PREPARED VERY PREPARED

Key Findings and Highlights

1. Enter highlights for retention and engagement

(Optional) Step 1(f-i): Enter Agency Events Additional Details

To complete Step 1(f-i), enter a brief description of the agency engagement events on the second page of the retention and engagement section.

Agency Engagement Events

<u>Event Month</u>	<u>Event Name</u>	<u>Event Participation</u>	<u>Key Notes on Events</u>

1. Enter notes for engagement events

(Optional) Step 1(f-ii): Enter Employee Recognition Additional Details

To complete Step 1(f-ii), enter a brief description or additional details of employee recognition on the second page of the retention and engagement section.

Agency Employee Recognition

<u>Number of Employees Recognized by Award Type</u>	<u>Key Notes on Employee Recognition</u>
<ul style="list-style-type: none"> ■ Tangible Award ■ Certificate ■ Bonus ■ Recognition Leave ■ Service Award ■ Other 	

1. Enter notes on Employee Recognition

Step 1(g): Enter Key Findings for Workforce Development

To complete Step 1(g), in the top right corner of the workforce development page, enter a more detailed description of any highlights or key information regarding workforce development as a continuation of what was entered in the Agency at a Glance section.

The screenshot shows a blue header for "Workforce Development" with a sub-header: "Workforce Development focuses on exploring the impacts of any development initiatives conducted, hosted, or supported by the Agency." Below this are two progress bars: "RISK TO AGENCY" with levels LOW (green), MEDIUM (orange), HIGH (red), and SIGNIFICANT (grey); and "AGENCY PREPAREDNESS" with levels NOT PREPARED (purple), SOMEWHAT PREPARED (red), PREPARED (orange), and VERY PREPARED (green). A yellow box labeled "Key Findings and Highlights" is highlighted with a red border and an arrow pointing to it from the text "1. Enter highlights for workforce development".

(Optional) Step 1(g-i): Enter Development Support Additional Details

To complete Step 1(g-i), enter a brief description or additional details development support for employee professional development on the workforce development page.

The screenshot shows a blue header for "Agency Support for Workforce Development". Below it is a bar chart titled "Participation by Support Item" with a legend and an x-axis from 0% to 100%. A yellow box labeled "Additional Notes on Development Support" is highlighted with a red border and an arrow pointing to it from the text "1. Enter highlights for development support".

(Optional Use): Custom Settings for the Report

The Workforce Planning Summary allows for some settings to be customized for the agency, to include identified changes from the prior year for certain metrics, colors of specific metrics for data callouts, specific optional sections to be omitted to the report, objective titles for the agency strategy, and a page break to ensure the signature does not fall on two pages.

To change any of the settings, select the setting from the dropdown menu for the respective metric or section in the light blue bar on the left side of the report.

The screenshot shows a settings interface. On the left, a light blue bar contains a question mark icon and the text "See Below for Optional Settings for this Report". Below this is a dropdown menu for "Optional: Include Indicators for Changes" with "Yes" selected. A red circle highlights the "Yes" option, with an arrow pointing to it from the text "1. Change to 'No' to exclude change indicators." The main report area shows "0" for "Agency Number", "Agency Workforce Planning and Development Summary" for "Fiscal Year 2023", and "Workforce Planning and Development Executive Summary" as a section title.

1. Change to "No" to exclude change indicators.

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.

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

EEO Codes	Critical	Exec.
Off. and Admin.		
Professionals		
Technicians		
Prot. Service		
Paraprofessionals		
Administrative Support		
Skilled Craft Workers		
Service/Maintenance		
Faculty		
Other		

Assessed Critical	Critical Roles by EEO Code	Value
1	Officials and Administrators	0
0.9	Professionals	0
0.8	Technicians	0
0.7	Protective Service Workers	0
0.6	Paraprofessionals	0
0.5	Administrative Support	0
0.4	Skilled Craft Workers	0
0.3	Service/Maintenance	0
0.2	Faculty	0
0.1	Other	0
0		

Total Positions Identified as Part of the Executive Team	Executive Team by EEO Code	Value
0	Officials and Administrators	0
0	Professionals	0
0	Technicians	0
0	Protective Service Workers	0
0	Paraprofessionals	0
0	Administrative Support	0
0	Skilled Craft Workers	0
0	Service/Maintenance	0
0	Faculty	0
0	Other	0

Sections of the Agency Strategy template that were optional can be omitted from the final summary by selecting “No” from the respective drop down in the optional column.

Optional Change: Include COV or Agency Exit Survey, Events, or Recognition Sections?

Include Exit Survey?	Yes
Include Agency Survey?	Yes
Include Engagement Events?	Yes
Include Employee Recognition?	Yes

Retention & Engagement | *Retention and Engagement focuses on understanding how employees move within or out of the agency, how long they serve*

RISK TO AGENCY: LOW MEDIUM HIGH SIGNIFICANT

Key Findings and Highlights

1. Change to “No” to exclude specific optional section.

Step 2: Refresh Report

After all information has been entered or settings adjusted, the report may need to be refreshed. The report can be refreshed by clicking the blue “Click to Refresh Summary Report” if the indicator says “Report needs to be refreshed. Click the Refresh button to the right”. After, the indicator will turn green and say “Report is Up to Date”.

Report Needs to be Refreshed. Click the Refresh Button to the Right.

Click to Refresh Summary Report

If not using Macros, the tab will need to be refreshed manually. Go to cell "AA1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

1. Click to Refresh Report

Report is Up to Date.

Click to Refresh Summary Report

If not using Macros, the tab will need to be refreshed manually. Go to cell "AA1" and click on the filter icon. Ensure the checkbox next to "0" is empty and click okay.

(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 7: Check Spelling

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



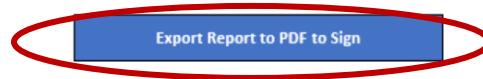
1. Click Spell Check This Tab button to launch the Check Spelling function

Step 4: Export Report to be Signed

To sign the report, the workforce planning summary can be exported to a PDF using the blue “Export Report to PDF to Sign” button.

Step 4: Export the Report to PDF

INSTRUCTIONS: *Click the blue button below to Export the report to a PDF. The PDF can then be used to collect electronic signatures or printed as a hard copy to be signed.*



1. Click to Export Report to PDF

6.0 Differences for Sub-Agency, Internal Department or Team Input Tool

If completing the internal tool, the same procedures detailed in the previous sections of this instructional guide can be followed with the following exceptions:

Agency Profile Tab

The employee classifications, executive team definition, and executive team positions are not included in the internal tool. The agency team or individual who is preparing the annual workforce plans determines which classifications and the executive positions to be included in the plan.

The internal group who is completing the tool only needs to review this information for awareness of the information that is included.

Complete/Incomplete and Progress Indicators

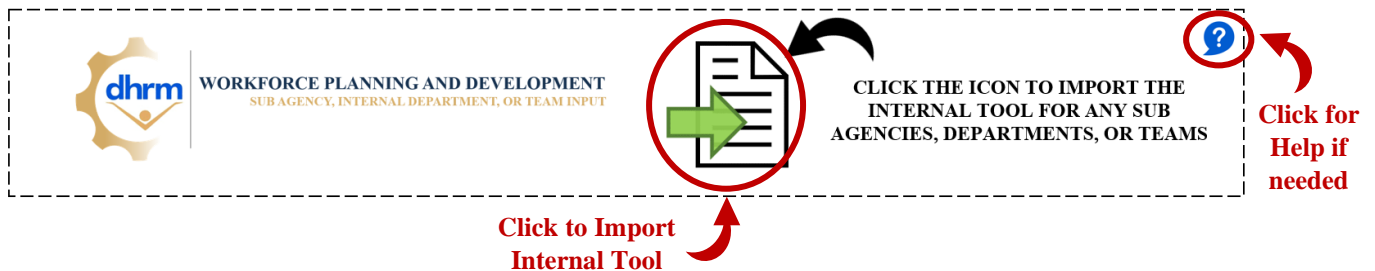
The design of the internal tool enables it to be complete customized for any internal group at any agency. Therefore, these are not included in the internal tool as the amount and type of required information will vary drastically for each group using the tool.

Internal Plan Review Tab

This tab is used to import and review information from the Sub-Agency, Internal Department, or Team Input Tool related to the Agency Strategy. This tab provides a quick glance tracker to know which plans have been imported, the date they were imported, and whether the data is still within the template. Information pertaining to the Agency Strategy can be easily viewed for comparison and completing the Agency Strategy template.

Step 1: Importing Internal Tools for each Respective Group

To import Internal Tools, click on the import data icon (white paper with green arrow) for the internal tool and follow the steps outlined in the Getting Started Tab section of these instructions.



After a tool is imported, the quick glance section in Step 1 will be updated to show the imported status, last imported date, and whether data from the tool is currently in the Agency Strategy template (shown below).

Sub Agencies

Sub-Agency Name	Current Import Status	Last Imported Date	Data In Template
Example1	Imported	4/4/23 4:59 PM	Data In Template
Example2	Imported	4/5/23 8:49 AM	Data In Template

(Optional) Step 2: Review Open Responses from the Internal Tool (for the Agency Profile)

To quickly review any free response questions pertaining to the Agency Strategy (SWOT Analysis, Risks, Preparation, Needs, Events, Recognition, Internships, and Development Programs), select which response to review from the drop-down menu for the specific group. This will automatically update the responses for each respective Sub Agency, Internal Department, or Internal team (shown below).

Some information may require two levels of items be selected to display the information. For example, to view the strengths an agency entered, first select which workforce planning area the strengths should be from and then select “strengths” from the second dropdown.

This process can be repeated for the remaining steps to review their information.

(Optional) Step 2: Review SWOT Analysis, Risks, Preparation, and Needs from the Imported Internal Plans

INSTRUCTIONS: To review information pertaining to the SWOT Analysis, Risk, Preparation, or Needs, select the information to view from the dropdowns in the yellow boxes below. After, for each group that that was imported, the respective information will be shown for the Agency to review easily. This information can then be used as a reference to complete the sections of the Agency Strategy Template.

Select which WFP Area of the Information
Select the Information to View

1. Select which response type to view.

(Optional) Step 3: Clear Data from Imported Internal Tools

Once data from any internal plans is imported, it remains in the Agency Strategy template unless manually cleared using the “Clear Data” gold button (shown below). This will remove all imported data from all internal tools.

(Optional) Step 3: Clear Data from Imported Internal Tools

INSTRUCTIONS: The data from the imported internal plans can remain in the template. However, if the Agency is more comfortable with removing the data, it can be removed by clicking the “Clear Data” button below. This will remove all imported internal plan information.

1. Click to remove data imported from internal plans.

7.0 Submitting the Workforce Plan to DHRM

After the report is signed, the Report PDF and Agency Strategy Excel Template can be emailed to dhrm.wfp@dhrm.virginia.gov no later than September 30th of the reporting fiscal year.

Please include the Agency Name and the term “Workforce Plan Report” 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.

8.0 Appendix & Additional Resources

Cardinal Report Information

Agencies still have access to historical data using the HuRman e480 report tool. The Cardinal reports are set up differently and may be a little more cumbersome, especially since we are just learning how to use them. However, agencies have direct access to their own data. You may want to review the [Catalog of reports](#) listed under the Resources tab on the Cardinal Webpage to determine which ones best meet your needs. In addition to the Job Data reports, you may want to review:

- Employee Disability and Veterans Status
- Employee Turnover
- Job Group Diversity
- Separations

The Cardinal team has an HCM Reports Job Aid tool and a Learning webinar to assist with running the reports.

Interactive Data Guides

DHRM is currently developing data guides to assist Agencies with understanding what data is available, where the data is located, and how to analyze the data; as well as sharing data analysis best practices to better equip agencies to develop data driven workforce strategies.

These interactive guides are under development and are expected to be available over the summer of 2023 (*as of May 2023*).

Workforce Planning Webpage

Visit the DHRM workforce planning webpage to learn more of strategic workforce planning, tools available to assist with workforce analysis, and additional resources available to assist agencies with developing effective workforce strategies.