WORKFORCE PLANNING AND DEVELOPMENT

EMPLOYMENT OPPORTUNITIES PLAN

INSTRUCTIONAL GUIDE

UPDATED: MARCH 2023

Table of Contents

1.0 Employment Opportunities Plan Background 4

2.0 Employment Opportunities Plan Template 5

3.0 Workforce Planning Data Definitions 6

4.0 Tab Guides 7

Home Tab 7

Getting Started Tab 7

Step 1: Review Overall Setup 8

Step 2: Review Important Features of This Tool 8

(Optional) Step 3: Enable Macros to Utilize Full Functionality 10

(Optional) Step 4: Import Data from Other Sources 10

Agency Profile Tab 11

Step 1: Enter Agency Information 11

Step 2: Enter Classified Workforce Information 13

Workforce Data Tab 14

Step 1: Enter Classified Employee Recruitment Information 14

Step 2: Enter Alternative Hiring Process (AHP) Information 14

Step 3: Enter Classified Employee Retention Information 15

Agency Strategy Tab 16

Optional – Review Workforce Insights Section 17

Step 1: Complete a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis for the Agency Related to the Employment of Individuals with Disabilities 18

Step 2: Create an Agency Strategy 21

(Optional) Step 2(a): Create an Agency Strategy without Macros 23

(Optional) Step 3: Check Spelling 25

EOP Summary Tab 25

(Optional) Refresh Report without Macros 26

Step 1: Complete EOP Summary 27

Step 1(a): Enter Report Summary 27

Step 1(b): Enter Brief Overview and Notes for SWOT Analysis 28

(Optional) Optional Report Settings 29

Step 2: Ensure the Report is Up to Date 31

Step 3: Export the Report to PDF 31
Optional Step 3: Printing the Report to PDF (without Macros) 31
5.0 Submitting the Report to DHRM 32
For Questions or Additional Assistance 32

1.0 Employment Opportunities Plan Background

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

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

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

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

Interested in keeping up to date with workforce planning announcements?
All Announcements are published in the monthly DHRM Highlights

2.0 Employment Opportunities Plan Template

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

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

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

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

3.0 Workforce Planning Data Definitions

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

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

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

4.0 Tab Guides

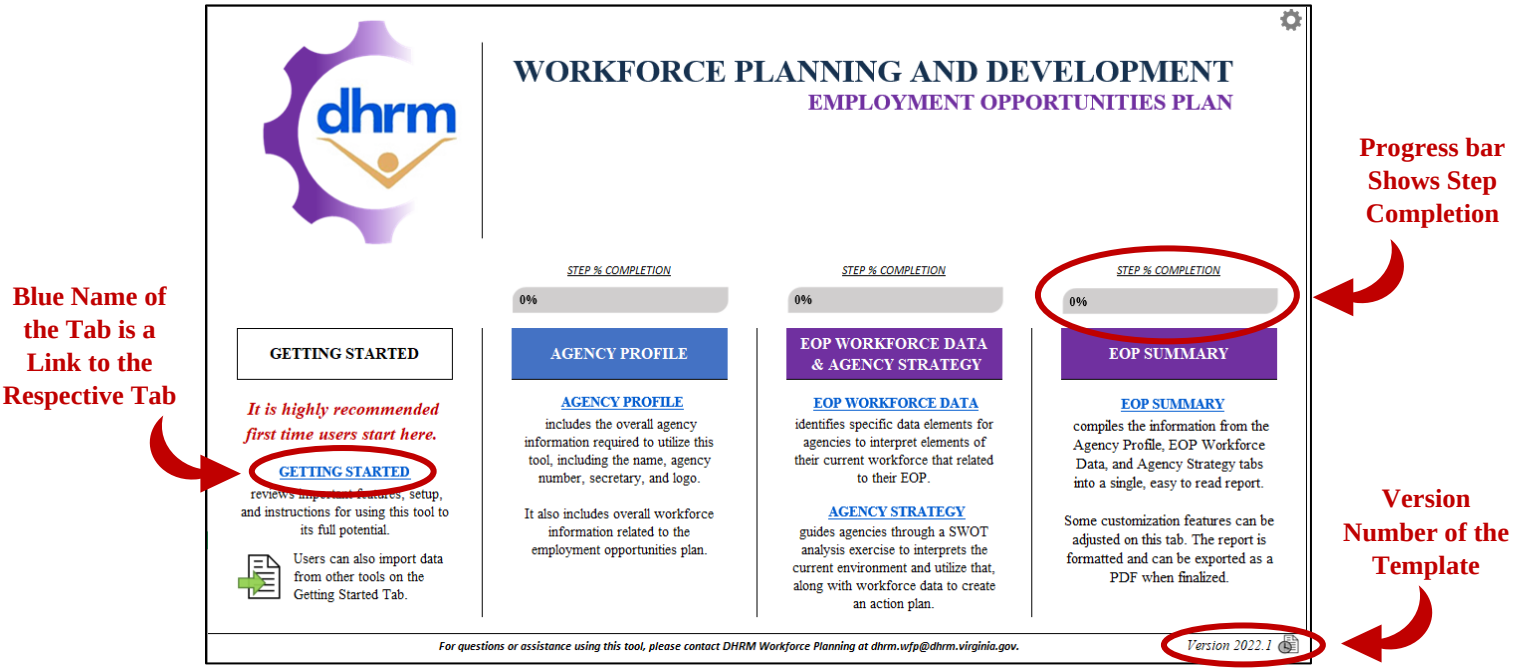
The Employment Opportunities Plan template is divided into several tabs that house similar information. It is recommended for users to progress through the tabs from left to right, beginning with the Home Tab.

Home Tab

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

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

To being using the template, click on the "Getting Started" Tab name in blue.



Getting Started Tab

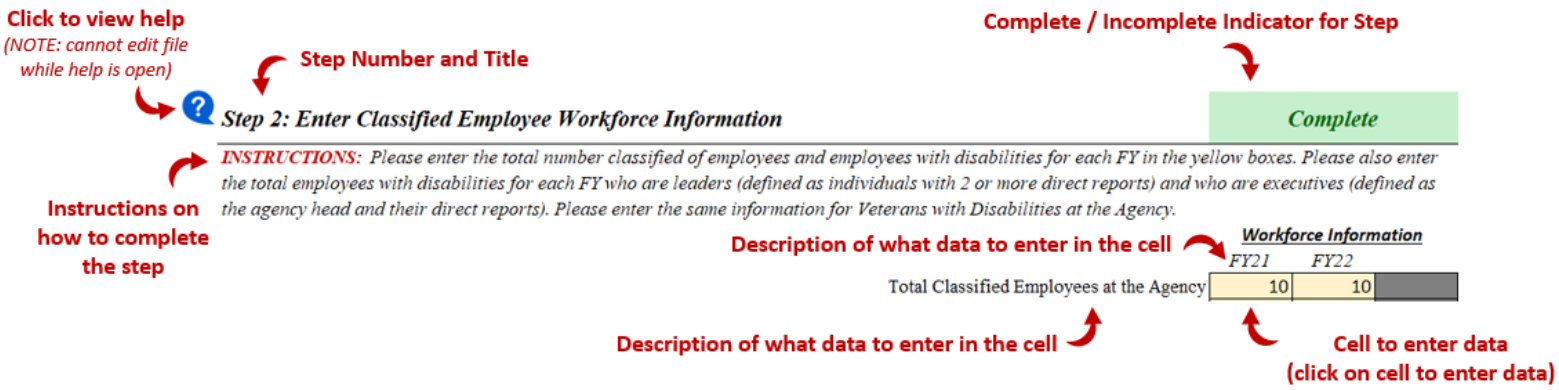
The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Employment Opportunities Plan template. Though it is not required to review, **it is highly recommended users spend time to review this information.**

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

Step 1: Review Overall Setup

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

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



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

Step 2: Review Important Features of This Tool

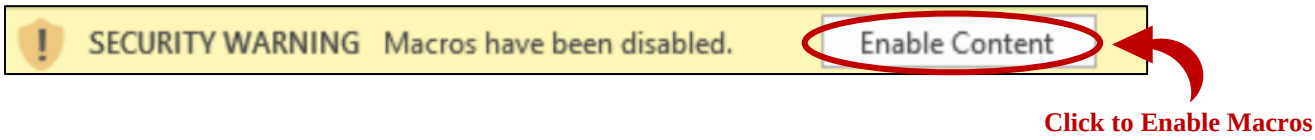
The Getting Started tab provides a breakdown of the important features of the template, used to assist with entering and interpreting workforce information. Below are descriptions of the template's key features.

	USE OF EXCEL MACROS This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. **NOTE: Excel Macros must be enable to use them.** The template can also be used without the Macros, but will require some manual edits.
	EASY FILE NAVIGATION 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.

	COLOR CODED DATA ENTRY 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.
	BUILT-IN HELP FEATURES 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.**
COMPLETE **INCOMPLETE**	**PROGRESS INDICATORS** 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.
	DATA IMPORT 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.**
	EASILY REVIEW PRIOR INFORMATION 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.**
	TEMPLATE VERSIONS 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. 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.

(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.



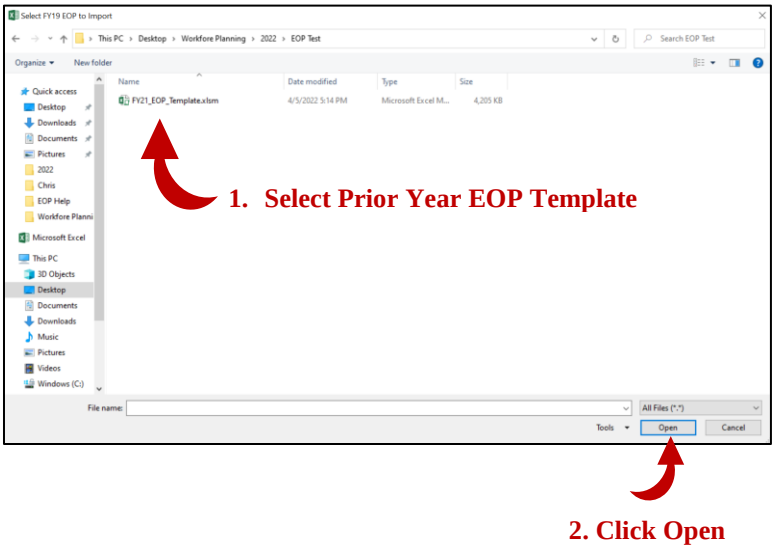
(Optional) Step 4: Import Data from Other Sources

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

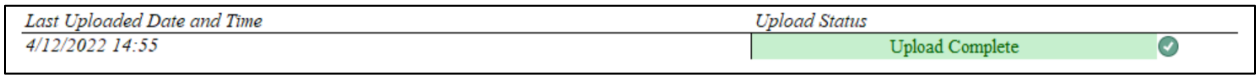
Agency Profile	Workforce Data	Agency Strategy
Agency Name Overall Workforce Data	Hiring Information Applicant Information Internal Promotions Internal Transfers Voluntary Separations External Transfers	SWOT Analysis Response (view only) Strategy Objectives and Action Items

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

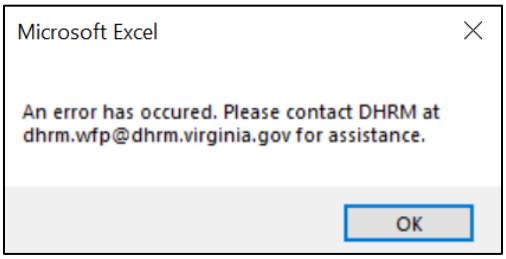
This will open the standard "Open File" dialog box. Simply locate and select the Prior Fiscal Year EOP template and click "Open". (Shown in the picture below).



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



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



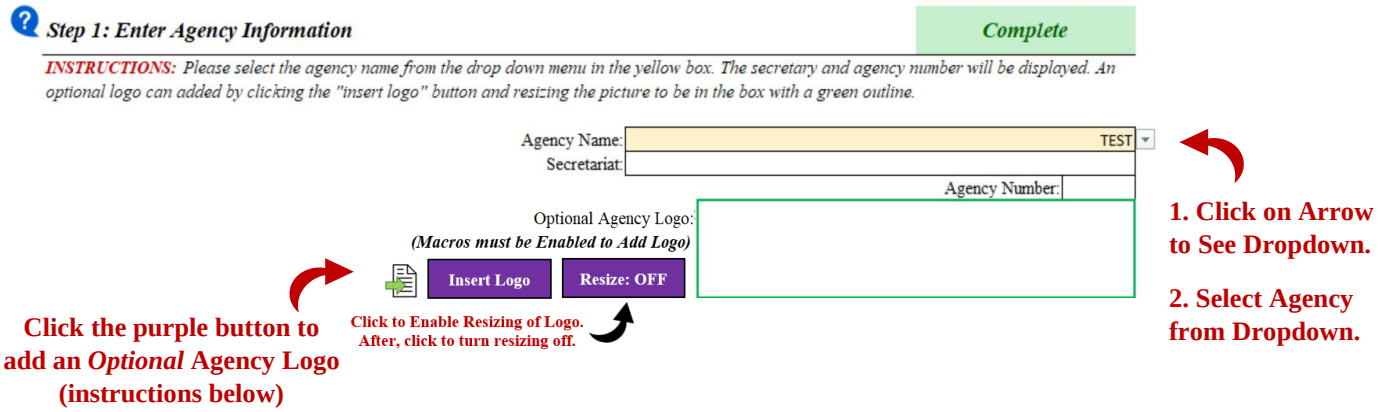
Agency Profile Tab

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

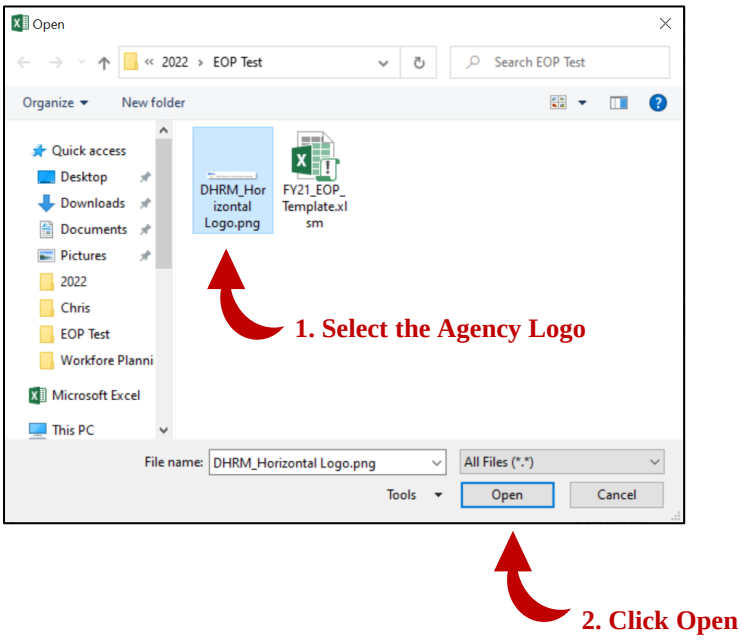
Step 1: Enter Agency Information

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

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

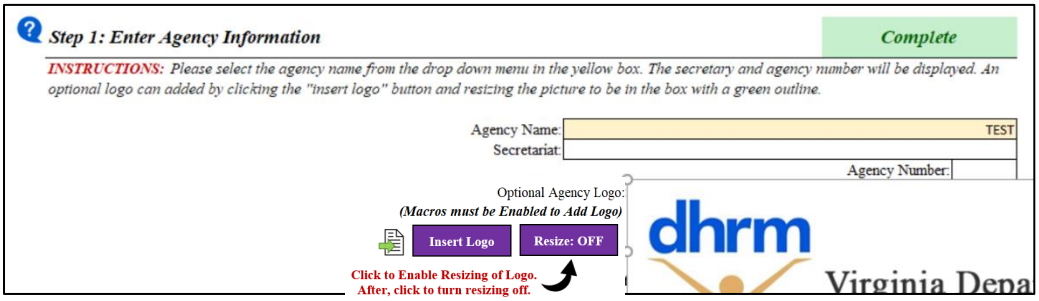


To add an ***optional*** Agency Logo, click on the purple button to open the standard "Open File" dialog box. Simply locate and select the Agency Logo and click the "Open" button. **NOTE: The Agency Logo must be a picture file.**

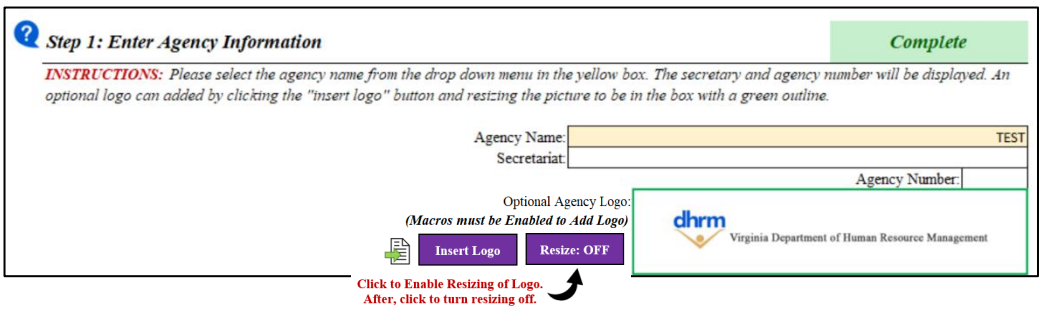


Once added, resize the logo to be within the green outlined box (shown in the picture below) by clicking the "Resize: OFF" purple button. After the Image is resized to be within the green box, click the "Resize: ON" button.

Before

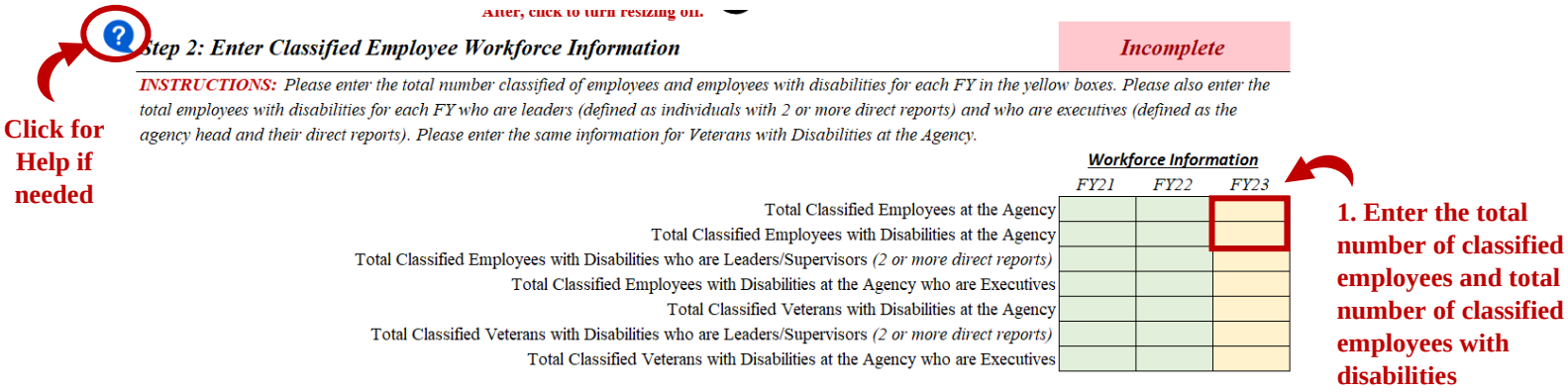


After

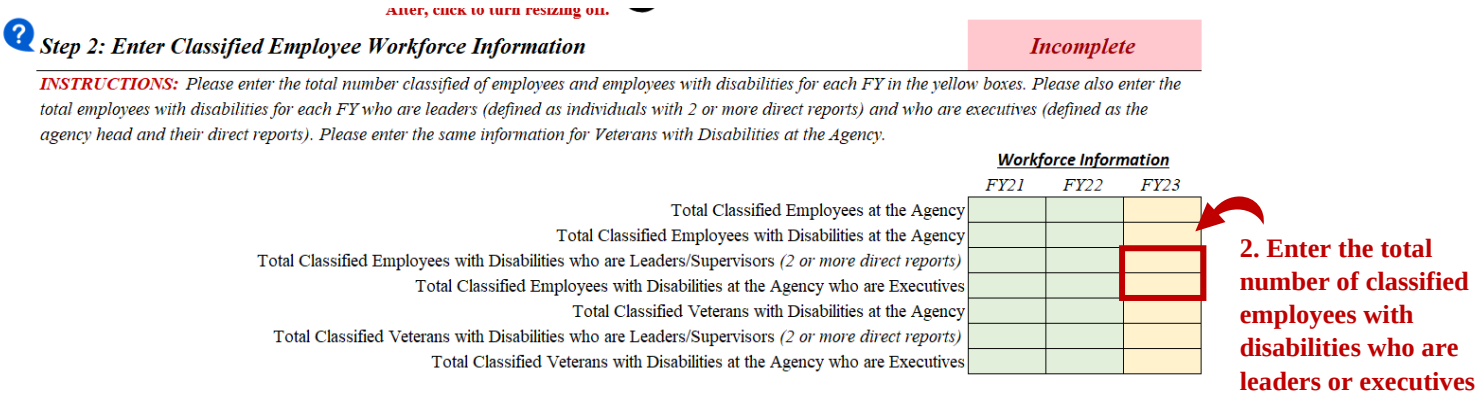


Step 2: Enter Classified Workforce Information

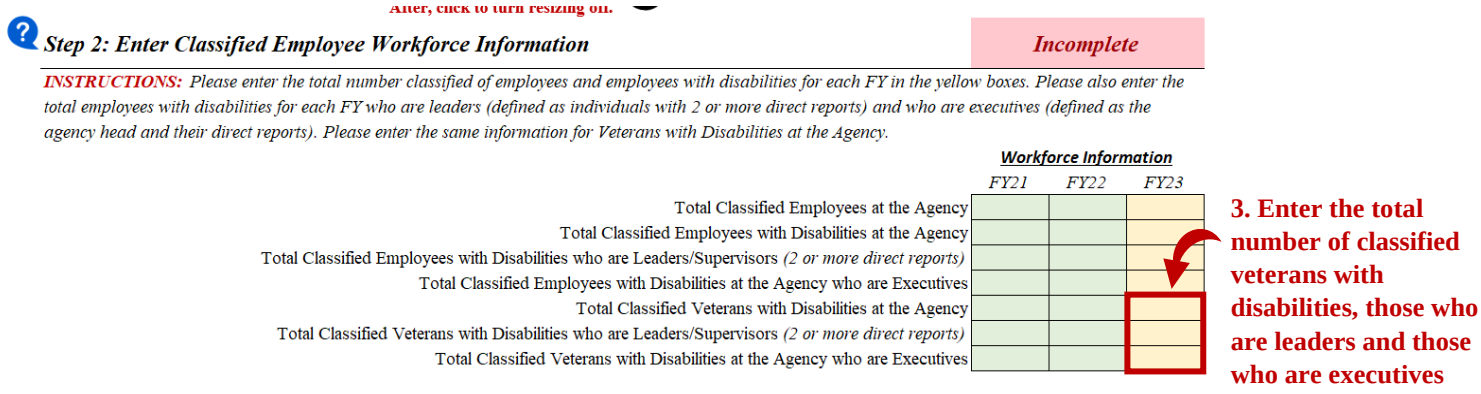
To complete step 2, enter the total number of classified employee and total number of employees with disabilities for each fiscal year in the yellow boxes below outlined in red (shown below). To enter the data, click on the respective cell and then enter the number.



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



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



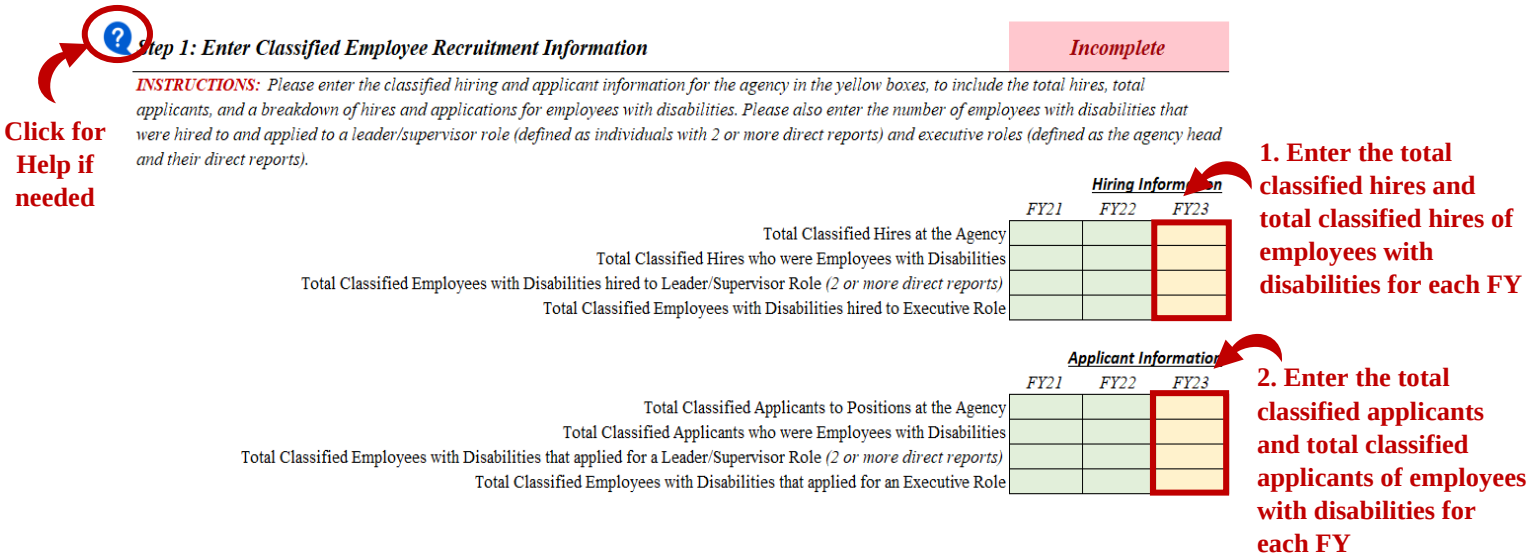
Workforce Data Tab

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

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

Step 1: Enter Classified Employee Recruitment Information

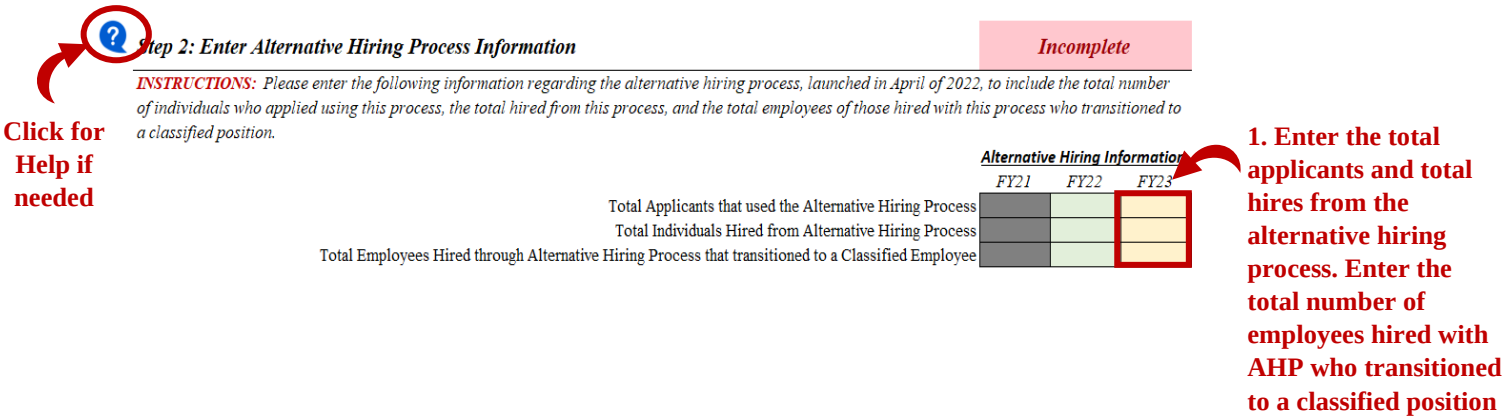
To complete step 1, enter the classified hiring and applicant information for the agency in the yellow boxes outlined in red for each fiscal year. These include the total classified hires, total classified applicants, and a breakdown of classified hires and applicants who were employees with disabilities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



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

Step 2: Enter Alternative Hiring Process (AHP) Information

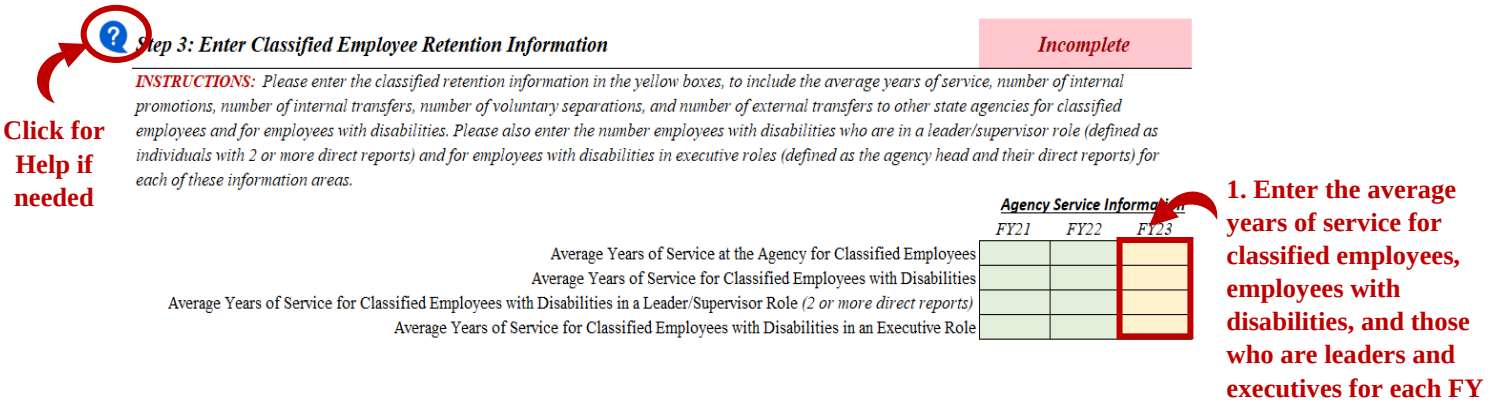
To complete step 2, enter the specific information regarding the alternative hiring process, which launched in April 2022, to include the total number of individuals who applied using this process, the total hired from this process, and the total employees of those hired with this process who transitioned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



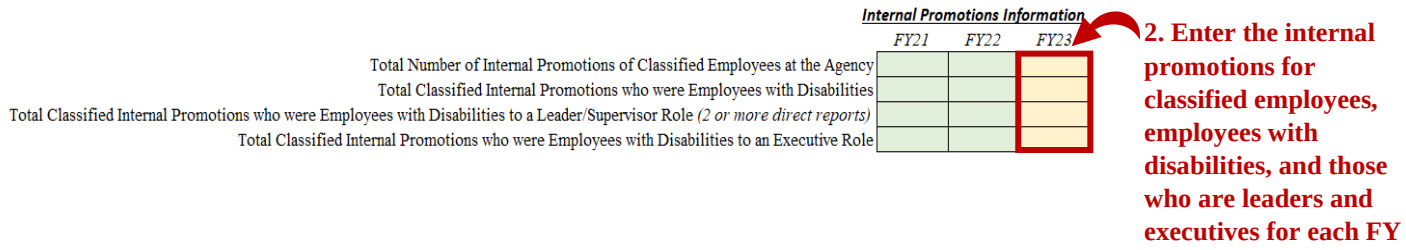
Step 3: Enter Classified Employee Retention Information

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

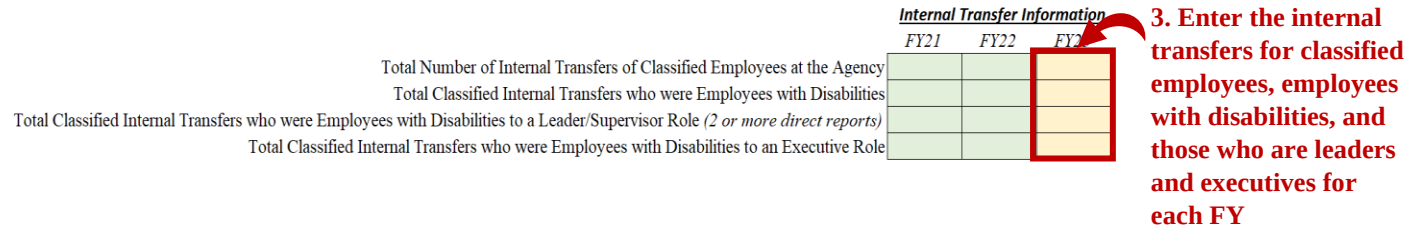
To enter the agency years of service, enter the average years of service for classified employees and classified employees with disabilities. Then, enter the average years of service for employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more direct reports)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



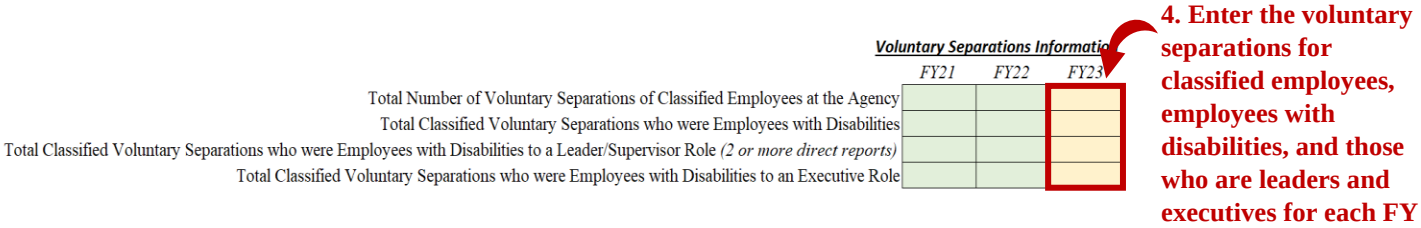
Next, enter the number of internal promotions in the yellow boxes outlined in red below for classified employees and classified employees with disabilities. Then, enter the number of internal promotions of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more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



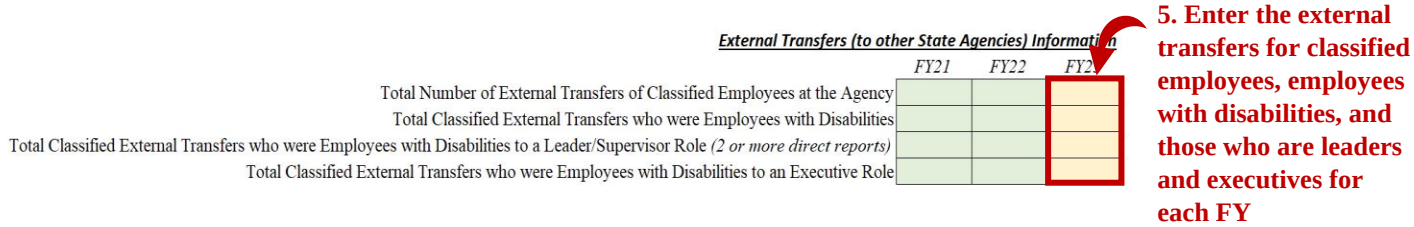
Next, enter the number of internal transfers in the yellow boxes outlined in red below for classified employees and classified employees with disabilities. Then, enter the number of internal transfers of employees with disabilities who are leaders or supervisors (defined as individuals with 2 or more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



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



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

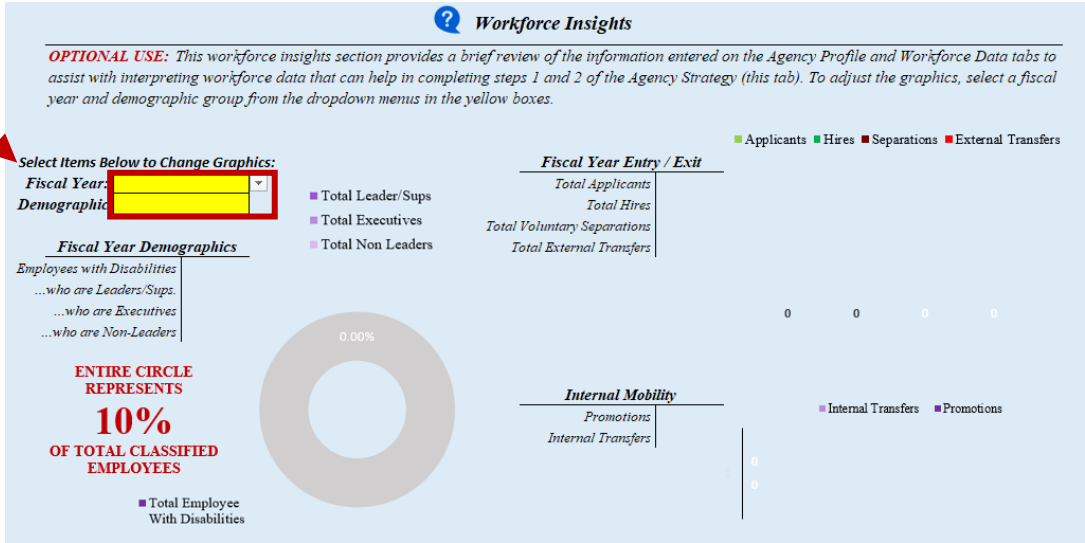


Agency Strategy Tab

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

Optional – Review Workforce Insights Section

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



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

After Fiscal Year and Demographic Data is selected:

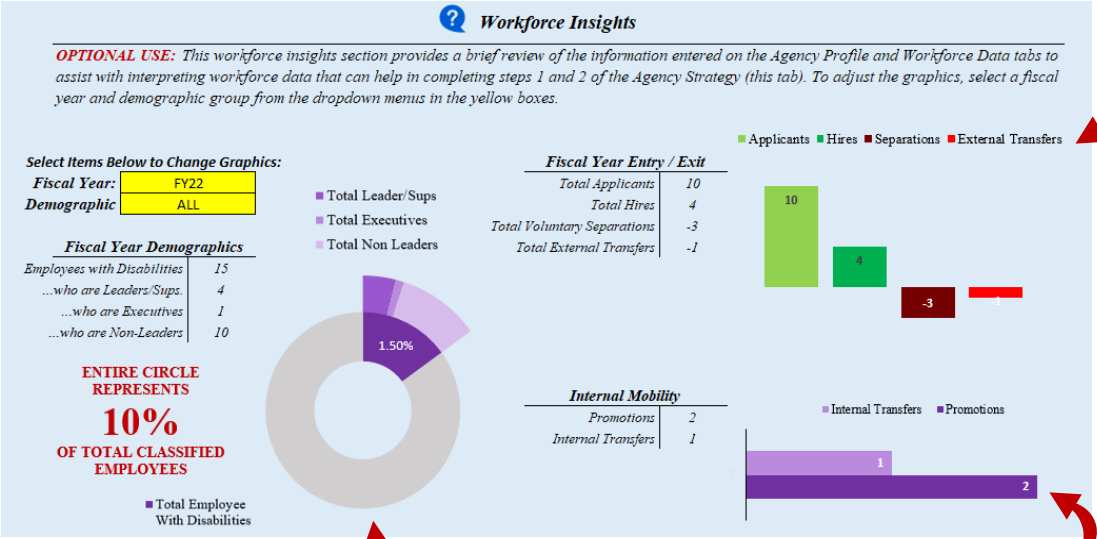


Chart to show agency entry (applicants and hires) and exits (vol. separations and external transfers) of employees with disabilities

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

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

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

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

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

▼ -10.0%

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

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

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

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

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

Step 1(a): Enter Agency Strengths **Incomplete**

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

Recruitment	Retention	Engagement	Learning / Development
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

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

Click the checkbox if there are no items to enter

Step 1(b): Enter Agency Weaknesses **Incomplete**

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

Recruitment	Retention	Engagement	Learning / Development
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

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

Click the checkbox if there are no items to enter

Step 1(c): Enter Agency Opportunities **Incomplete**

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

Recruitment	Retention	Engagement	Learning / Development
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

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

Click the checkbox if there are no items to enter

Step 1(d): Enter Agency Threats **Incomplete**

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

Recruitment	*Retention*	*Engagement*	*Learning / Development*
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

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

Click the checkbox if there are no items to enter

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

SHOW Prior Year Strengths

Click the magnifying glass icon to show prior year responses.

Recruitment	*Retention*	*Engagement*	*Learning / Development*
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

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

HIDE Prior Year Strengths

Click the magnifying glass icon to hide prior year responses.

Recruitment	*Retention*	*Engagement*	*Learning / Development*
The agency does an excellent job of advertising positions and including inclusive language in its job postings.		*The agency does an excellent job of working with DARS to*	
☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.	☐ Check box if there is nothing to enter for this category.

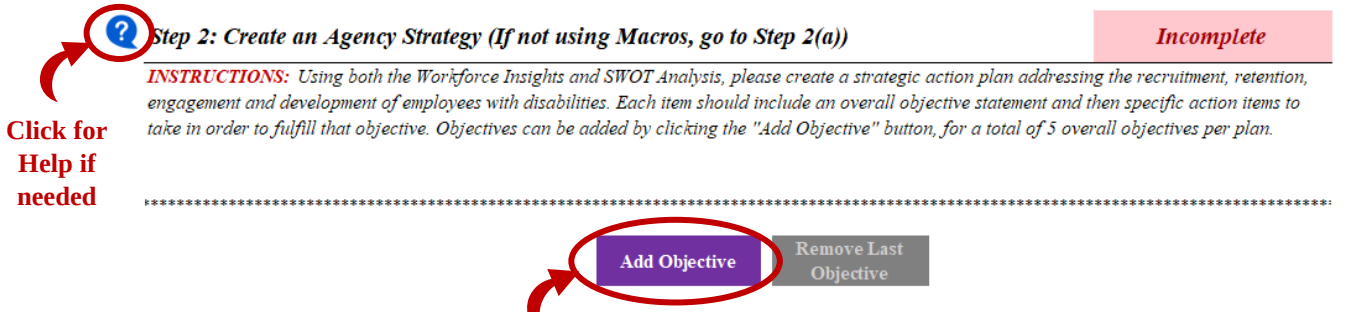
Step 2: Create an Agency Strategy

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

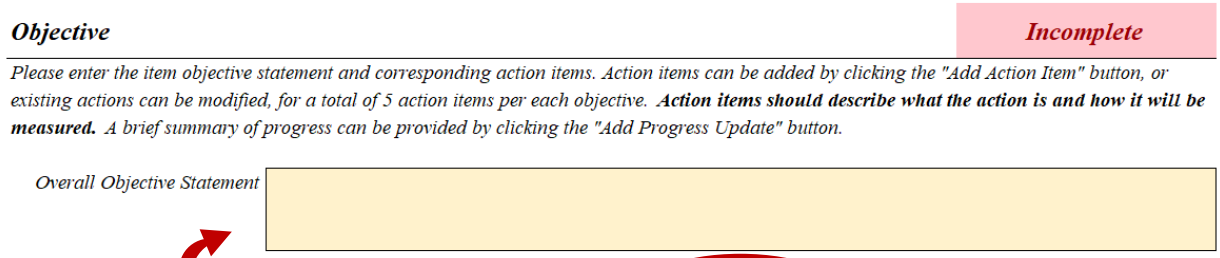
Each item should include an overall objective statement and then specific actions items to take in order to fulfill that objective. A total of 5 objectives can be added per plan and a total of 5 action items can be added per objective.

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

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

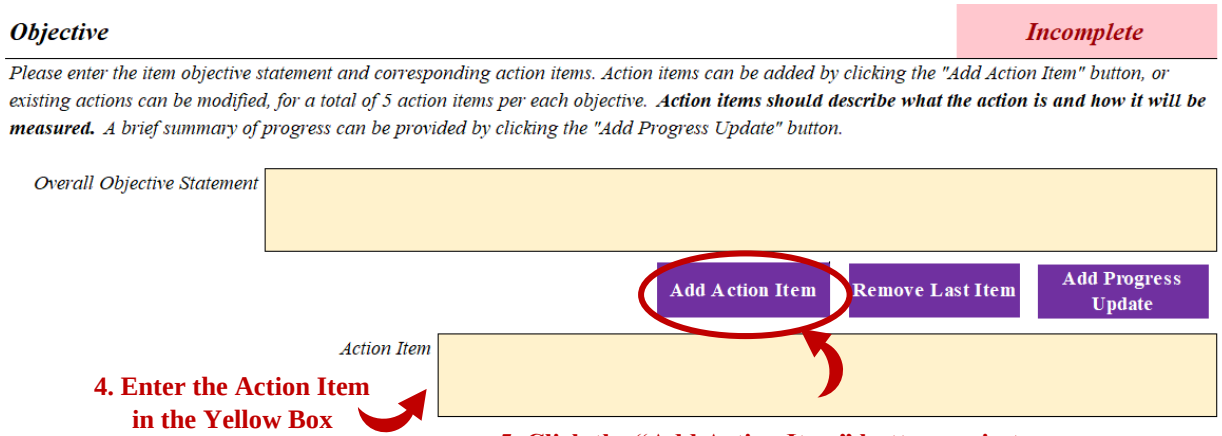


1. Click the "Add Objective" to see Objective Entry Box (below)



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

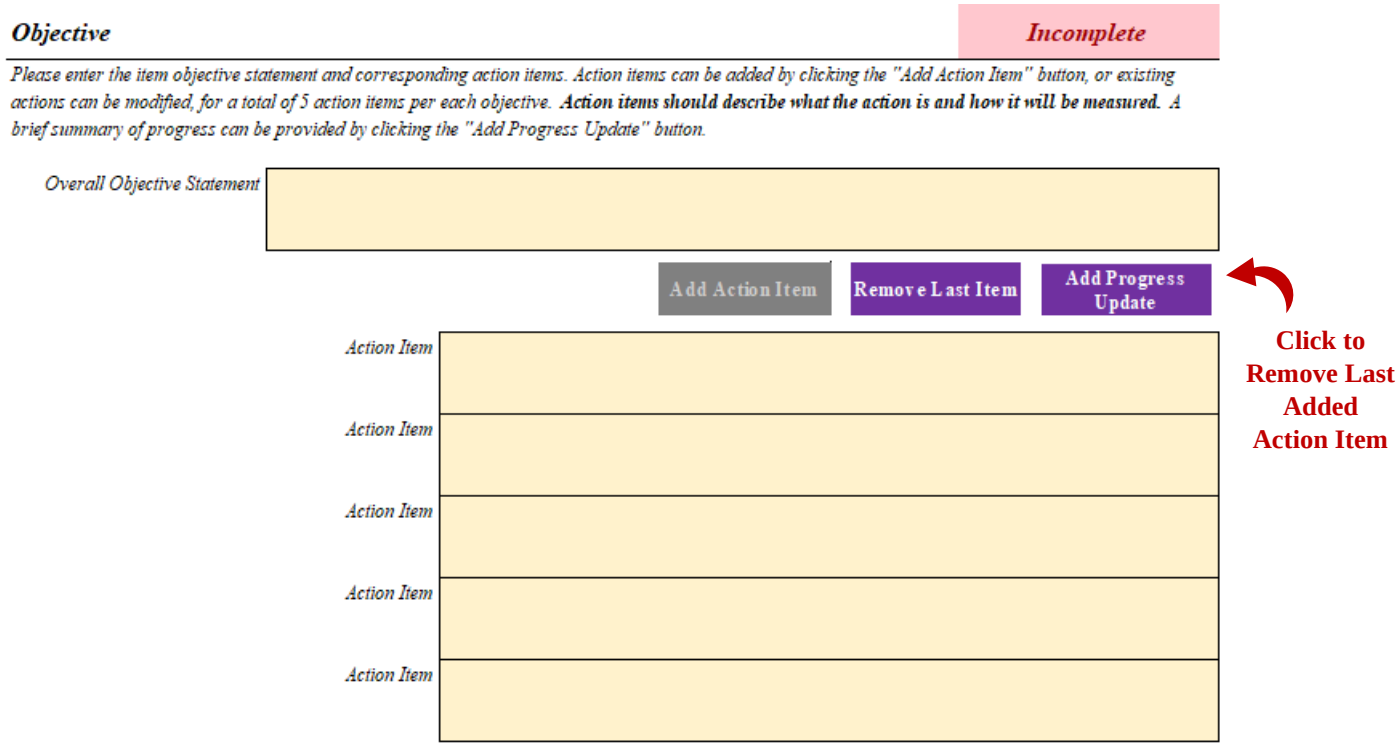
3. Click the "Add Action Item" button to see the Action Item Entry box



4. Enter the Action Item in the Yellow Box

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

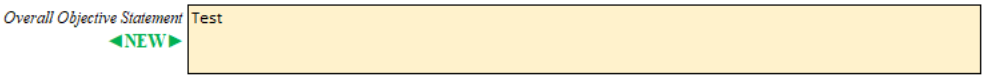
Action items can be removed by clicking the “Remove Last Item” purple button. This will remove the last action item that was added.



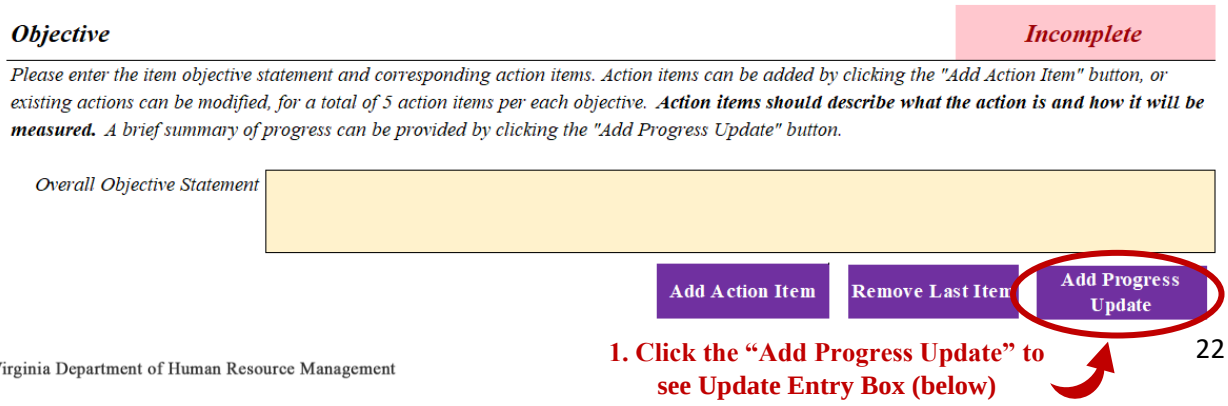
If the prior year employment opportunities plan was imported, the prior year objectives and action items will be shown. These items can be modified, new items added, or a progress update provided.

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

New items will show a “New” Indicator.



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

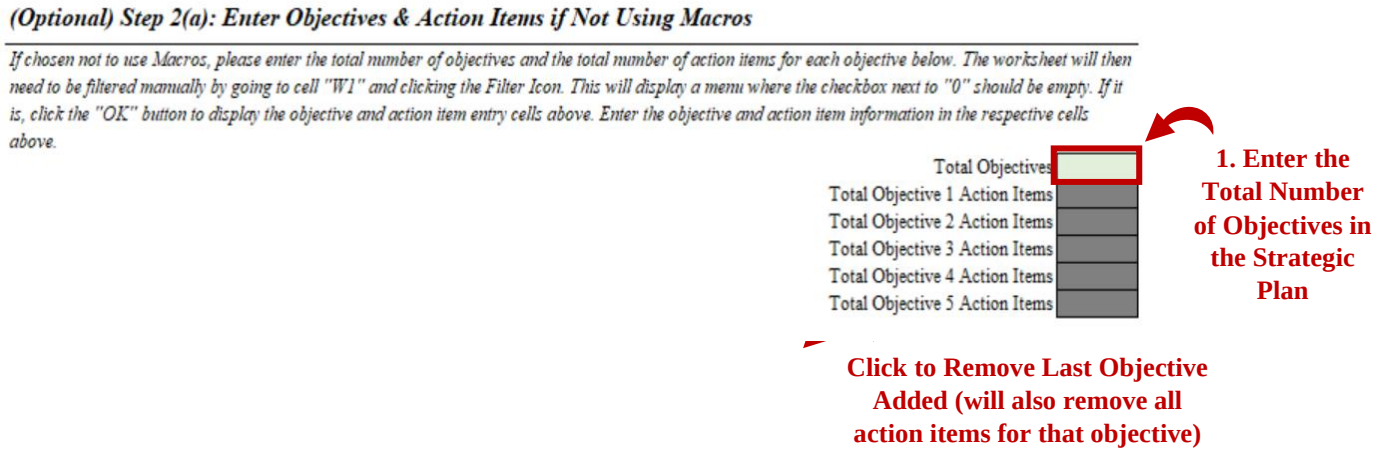


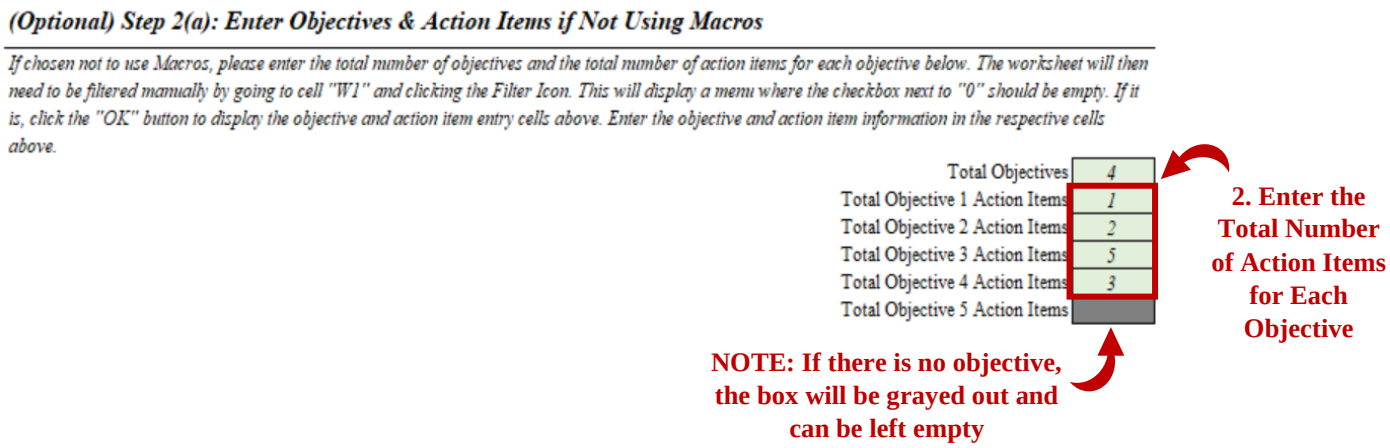
These steps should be repeated for any additional objectives (up to 5) added to the strategic action plan. In the event an objective should be removed, click the "Remove Objective" purple button. This will remove the objective and all action items.

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

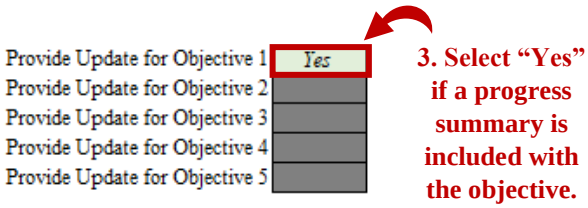
If the purple buttons were used to enter the Strategic Action Plan, this step can be skipped.

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

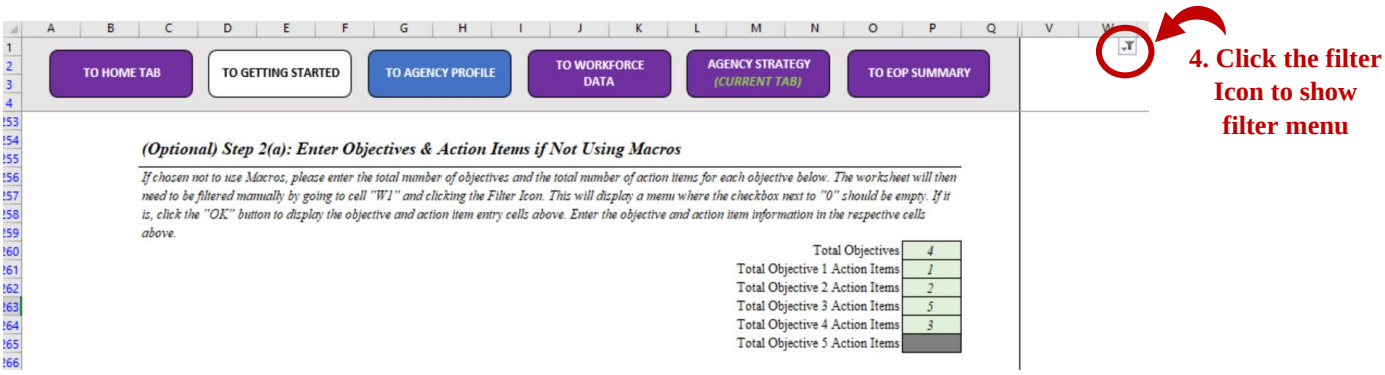


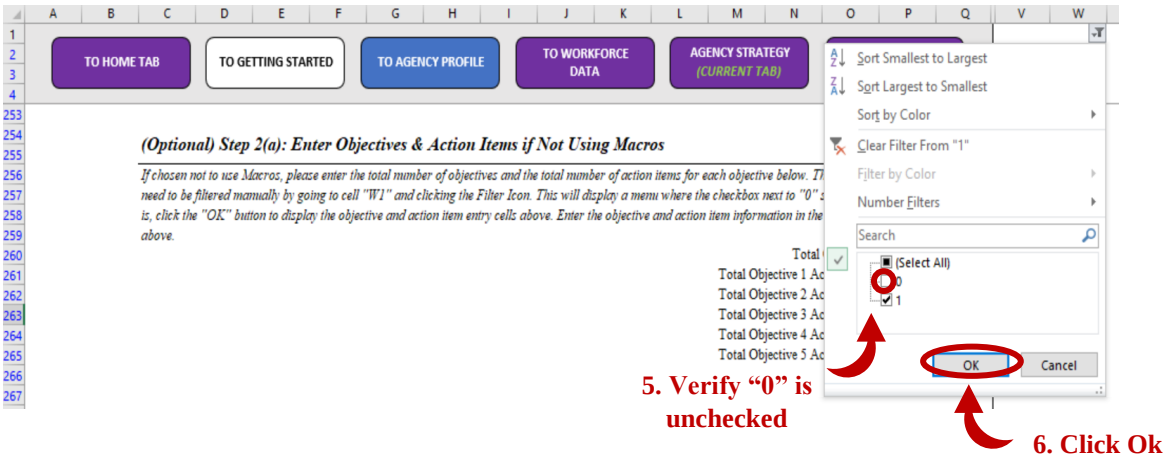


If any updates are being added to any of the objectives, select "yes" from the dropdown next to the objective the update is for (shown in the picture below).



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





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

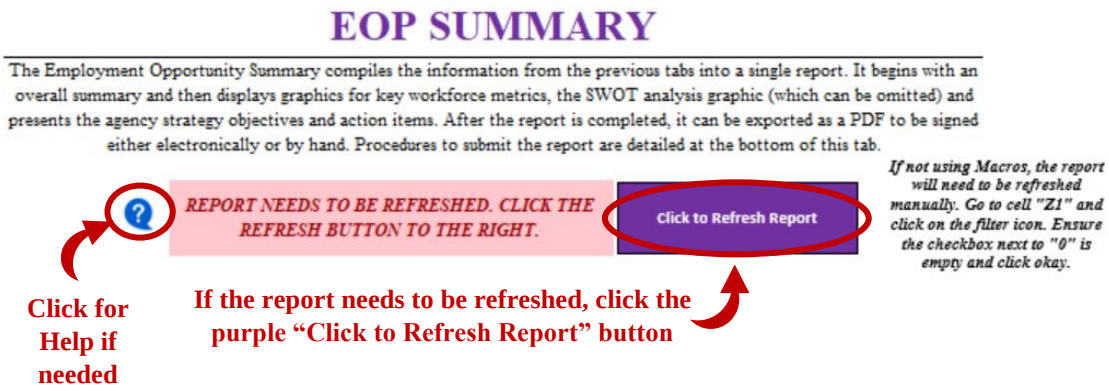
***(Optional)* Step 3: Check Spelling**

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

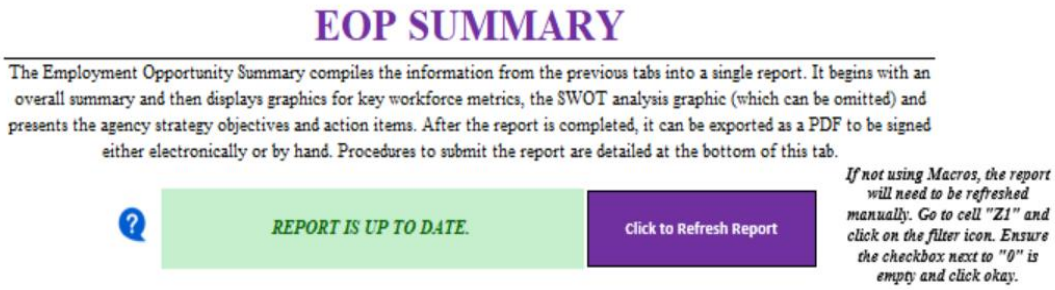
EOP Summary Tab

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

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

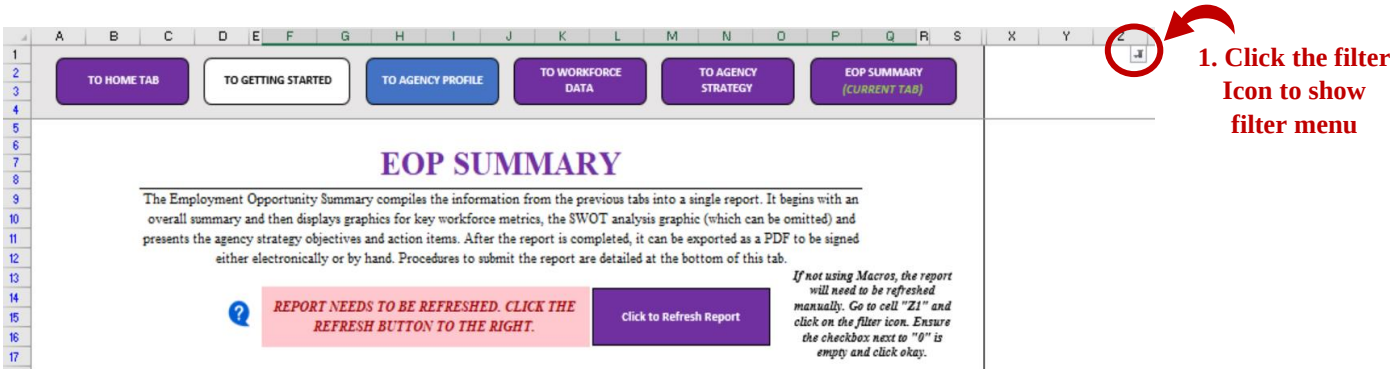


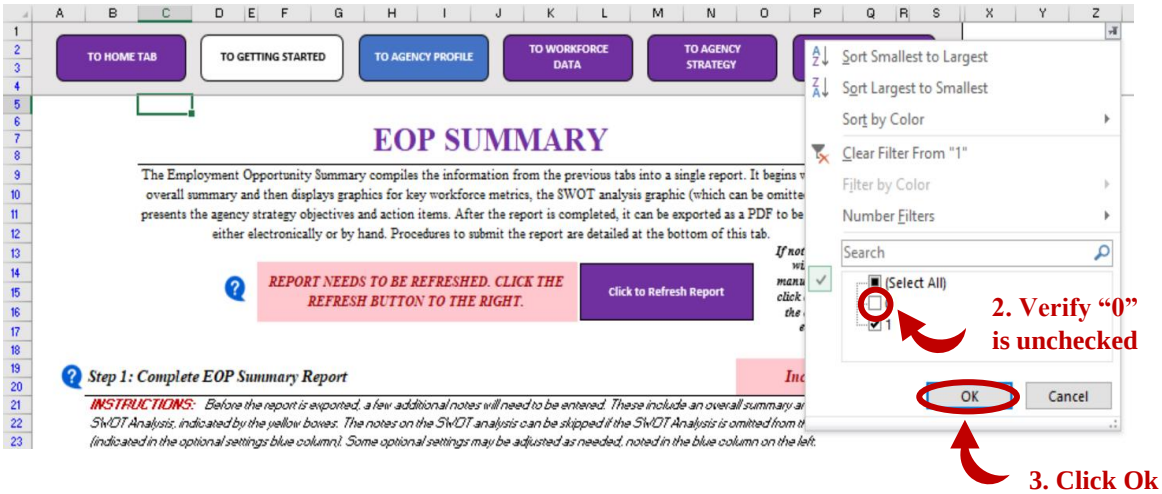
The indicator will change to "Report is up to date" after refreshing the report.

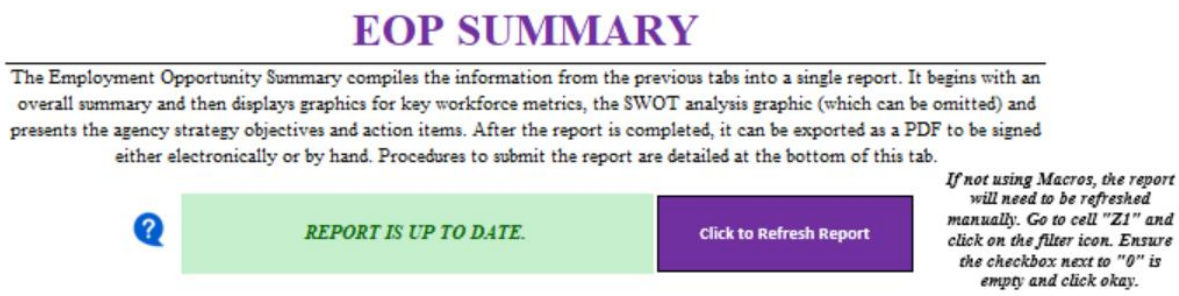


<u>(Optional) Refresh Report without Macros</u>

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

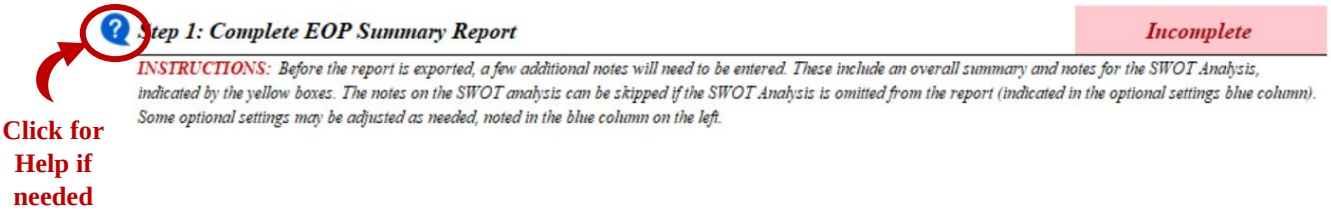






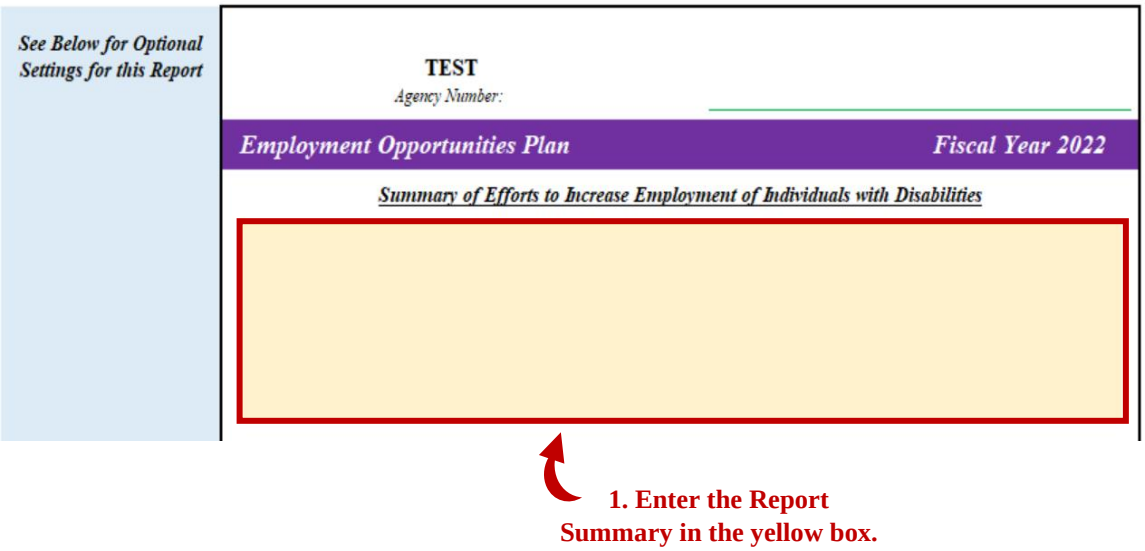
Step 1: Complete EOP Summary

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



Step 1(a): Enter Report Summary

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

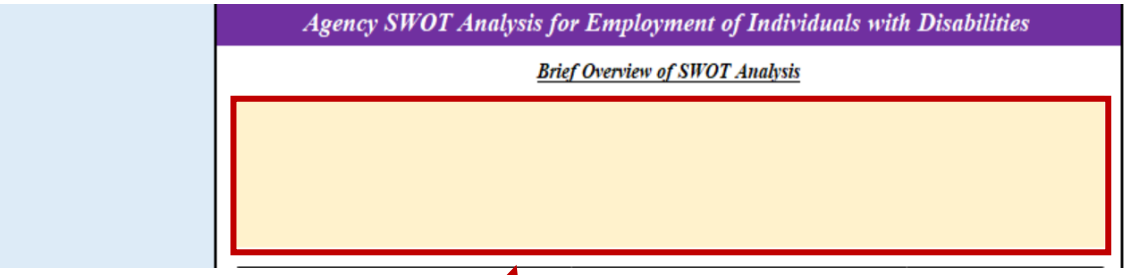


1. Enter the Report Summary in the yellow box.

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

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

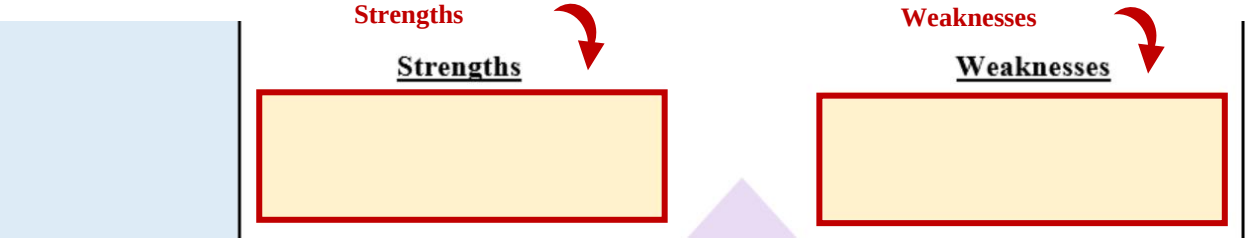
This step can be skipped if the SWOT analysis is omitted from the report. See the Optional settings on how to exclude the SWOT analysis on the report.

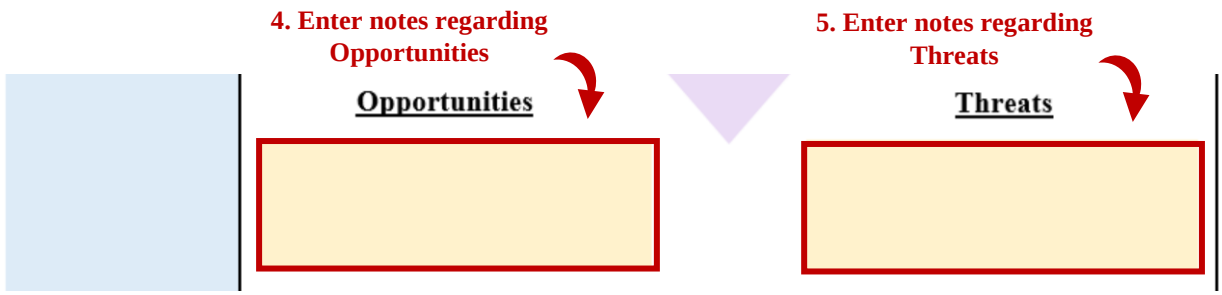


1. Enter a brief summary of the SWOT Analysis.

2. Enter notes regarding Strengths

3. Enter notes regarding Weaknesses

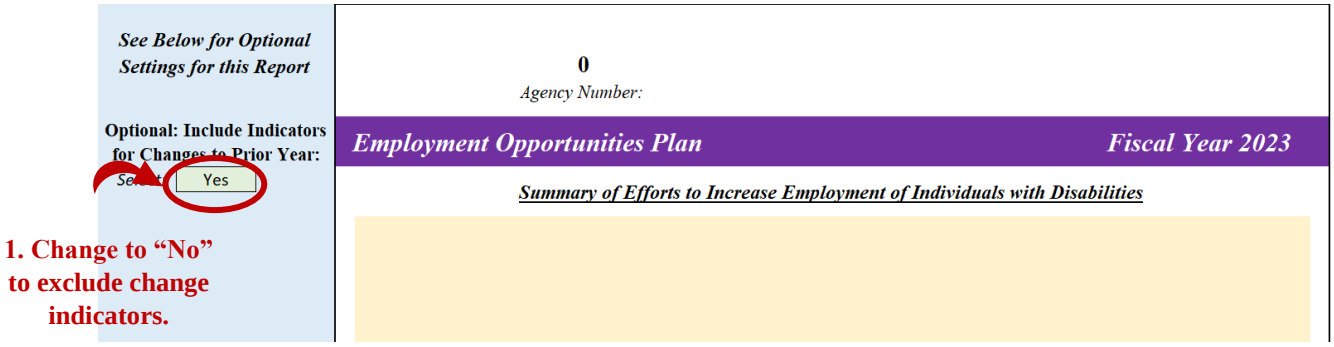




(Optional) Optional Report Settings

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

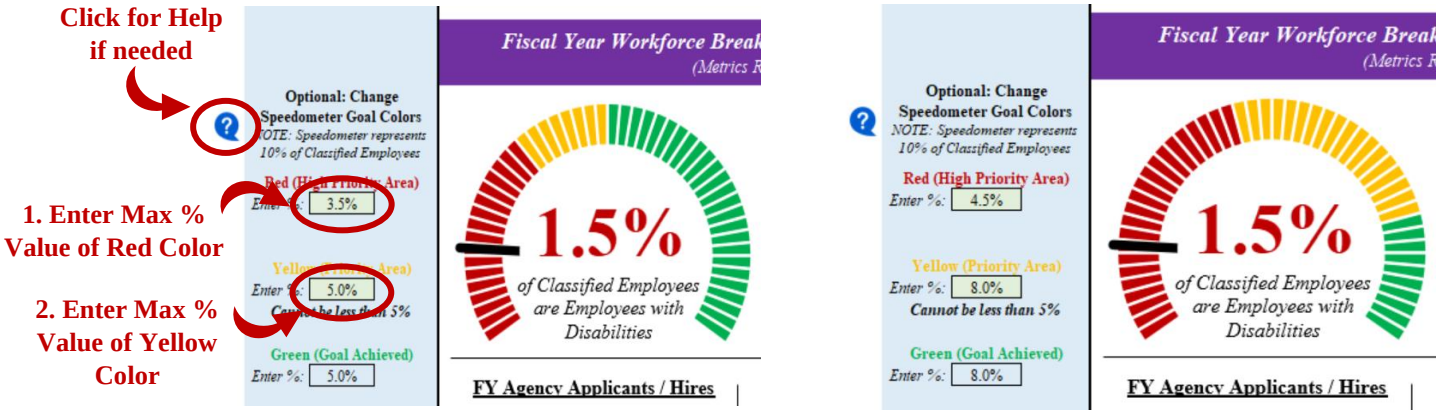
In the blue column on the left side of the report, the settings can be changed. For the data metrics, change indicators are included by default but can be exclude from the report if desired. To change this setting, change the "yes" to "no" in the green box for the "optional: include indicators for changes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



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

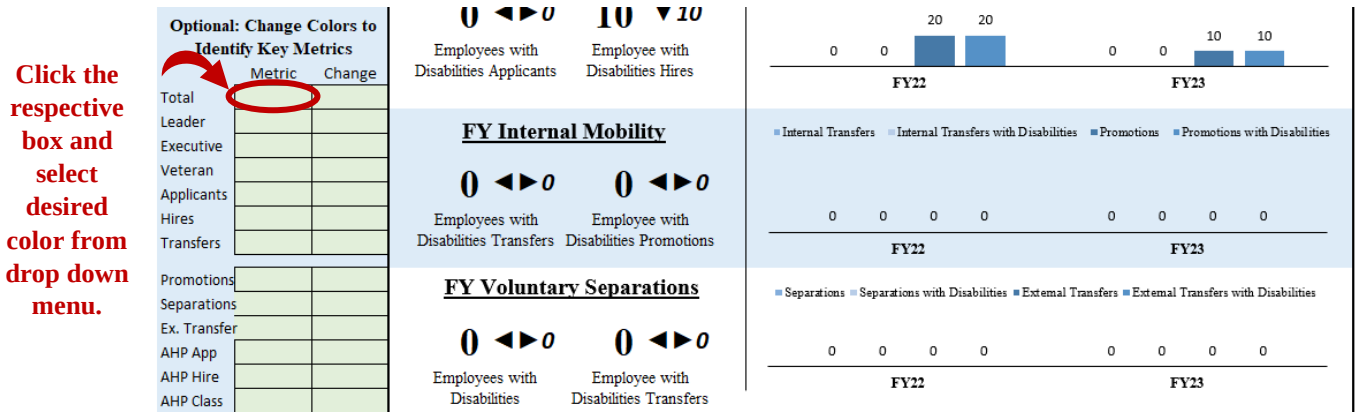
The default maximum value for the red area is 3.5% and the maximum default value of the yellow area is 5%.

Before Adjustment **After Adjustment**



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

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

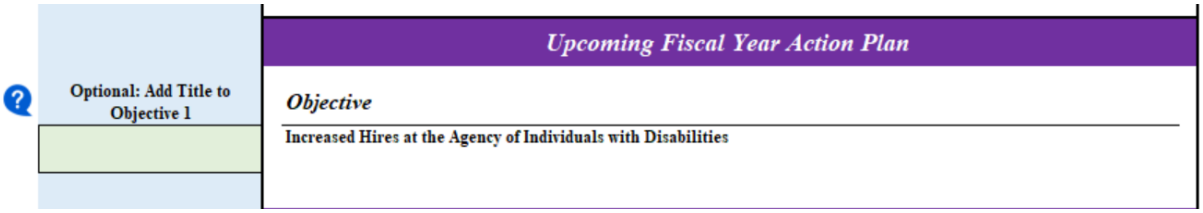


The next optional settings is to either include or omit the SWOT analysis from the report. By default, the SWOT analysis is included. To change this setting, change the green box under the "Include SWOT Analysis in Report?" optional setting in the blue column to "No". After, click the purple "Refresh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

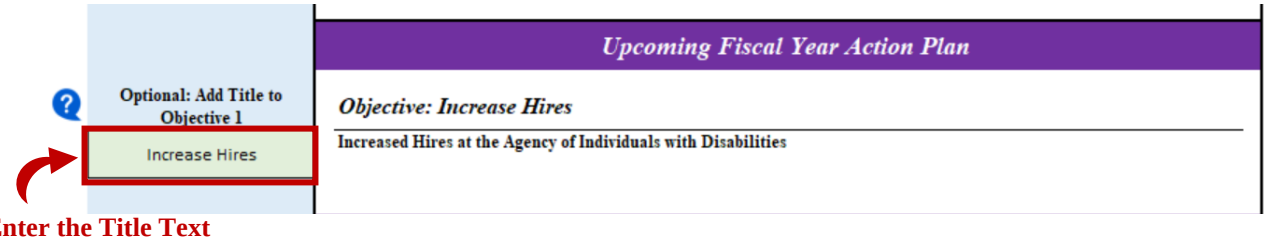
To change the setting back to including the SWOT analysis in the report, change the green box to "Yes" and click the "Refresh Report" purple button again.

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

Before Title is Added



After Title Is Added



1. Enter the Title Text into the Green Box

<u>Step 2: Ensure the Report is Up to Date</u>

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

<u>Step 3: Export the Report to PDF</u>

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

<u>Optional Step 3: Printing the Report to PDF (without Macros)</u>

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

5.0 Submitting the Report to DHRM

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

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

For Questions or Additional Assistance

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