



WORKFORCE PLANNING AND DEVELOPMENT

CONTINUITY OF OPERATIONS • RECRUITMENT • ENGAGEMENT • RETENTION • DEVELOPMENT



DATA DEFINITIONS

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Table of Contents

1.0	General Definitions	3
2.0	Workforce Planning Definitions	7
3.0	Agency Profile Template Definitions.....	8
4.0	Agency Strategy Template Definitions.....	10
5.0	Identifying Critical Roles Tool Definitions	12
6.0	Employment Opportunities Plan Definitions	14

1.0 General Definitions

AGENCY APPLICANTS

Unique number of applications received at the agency for specific position types within the reporting time period.

AGENCY HIRES

Number of new employees with a start date at the agency within the reporting time period.

AGENCY NAME

The full name (not abbreviation) of the Agency.

AGENCY NUMBER

The unique number assigned to agencies.

AGENCY OPPORTUNITIES

Strengths are elements EXTERNAL to the Agency (defined as being within the control of the Agency) that ENHANCE an Agency's ability to achieve a goal.

AGENCY STRENGTHS

Strengths are elements INTERNAL to the Agency (defined as being within the control of the Agency) that ENHANCE an Agency's ability to achieve a goal.

AGENCY THREATS

Strengths are elements EXTERNAL to the Agency (defined as being within the control of the Agency) that INHIBIT an Agency's ability to achieve a goal.

AGENCY WEAKNESSES

Strengths are elements INTERNAL to the Agency (defined as being within the control of the Agency) that INHIBIT an Agency's ability to achieve a goal.

ALTERNATIVE HIRING PROCESS

A different application process for the employment of people with differing abilities.

AVERAGE YEARS OF SERVICE

The average years of employees at the agency for the specific demographic and time period identified.

APPOINTED POSITION

Positions that are contingent on selection by the Governor of Virginia.

BLANK TEMPLATE

A blank Excel file created by DHRM for Agencies who do not utilize Cardinal or prior systems of the Commonwealth of Virginia so that they can still use the import data process. The template identifies the type of information to be included and the exact column headers for the data to be imported.

CARDINAL

The new human capital management system first launched in Fall of 2021. Agencies who are using this system have the ability to generate specific and ad hoc reports.

CLASSIFIED EMPLOYEE

Salaried employee whose terms and conditions of employment are subject to the Virginia Personnel Act and who is employed in a classified position.

COMMONWEALTH RMS

The Commonwealth of Virginia's Recruitment Management System, which provides reports for Agencies to be able to import into workforce planning tools and templates. These reports, in combination with others, can be used to calculate key recruitment metrics.

EEO CODE

The code corresponding to the classification of a position as identified by the Equal Employment Opportunity commission.

EMPLOYEE CLASSIFICATION

Classification of positions, such as classified, wage, or Administrative/Professional faculty, at the Agency.

EMPLOYEE WITH DISABILITY

Employee who voluntarily identifies as having a disability.

ENGAGEMENT

Refers to any activity, practice, or policies that support the financial, social, physical wellbeing of employees and the diversity, equity, inclusion or other cultural aspects at the agency.

EXECUTIVE TEAM

Employees at the Agency in the specific positions identified by the Agency as part of the executive team, which may be broken down by several workforce demographic categories.


EXTERNAL TRANSFERS

Employees who voluntarily separated from the agency to a position at another state agency in the Commonwealth.

FISCAL YEAR

The timeframe for taxing or accounting purposes. The Commonwealth of Virginia identifies the fiscal year from July 1st to June 30th.

IMPORT DATA ICON:

Represented by a white paper with a green arrow, it indicates with data from other tools or templates can be imported into the current tool. 

INTERNAL PROMOTIONS

Existing employees who were promoted to a new role with greater seniority and/or responsibilities within the agency.

INTERNAL TRANSFERS

Existing employees who were transferred to a different department or division within the agency or reporting to a new supervisor, with their new position remaining at the same level as their previous position.

LEADER / SUPERVISOR

Employees at the Agency that have at least 1 direct report, which may be broken down by several workforce demographic categories.

LEARNING AND DEVELOPMENT

Refers to any activity, practice, or policies that impact the growth and development of the knowledge, skills and abilities of employees at the agency. These can be both internal and external to the agency.

OBJECTIVE ACTION ITEMS

Action items are the specific actions the agency intends to take in order to meet the strategy objectives. Action items should be specific, describing what the action is, how it will be measured, and a potential timeframe for the action to be completed.

POSITION NUMBER

Specific Position Identification Number designated by the Agency.

RECRUITMENT

Refers to any activity, practice, or policies that impact attracting and hiring employees to the agency.

RECRUITMENT INFORMATION

The recruitment information section refers to information regarding applicants to the agency and employees hired by the agency. This information can further be broken down to specific demographics and positions (such as employees with disabilities).

RETENTION

Refers to any activity, practice, or policies that impact the years of service of employees at the agency or used to support employees remaining with the agency.

RETENTION INFORMATION

The retention information section refers to information regarding years of service at the agency, mobility within the agency through promotions and internal transfers, and employees exiting the agency through voluntary separations and external transfers to other state agencies. This information can further be broken down to specific demographics and positions (such as employees with disabilities).

SECUREPASS

The portal that houses workforce reports for Agencies. Access to SecurePass must be requested.

SECRETARIAT

Refers to the specific area of the Commonwealth of Virginia Organization Chart, headed by a secretary, the agency belongs to. See the Commonwealth of Virginia Organization Chart to learn more.

STRATEGY OBJECTIVE

An objective of the strategy is a general or broad statement to illustrate what the agency intends to do in order to achieve their goals or strategic priorities.

TOTAL APPLICANTS THAT USED THE ALTERNATIVE HIRING PROCESS

The total number of applications received by the agency using the alternative hiring process.

TOTAL INDIVIDUALS HIRED FROM ALTERNATIVE HIRING PROCESS

The total number of hires from the applications received using the alternative hiring process.

TOTAL INDIVIDUALS THAT TRANSITION TO CLASSIFIED POSITIONS (USING AHP)

The total number of individuals hired through the alternative hiring process that transitioned to a classified employee.

VERSION ICON

Noted by a white piece of paper and clock, it is a visual icon to help identify where the version number of any tools or template are located. 📄🕒

VETERAN

Employee who voluntarily identifies they are a veteran.

VOLUNTARY SEPARATIONS

Employees who voluntarily separated from the agency, such as service retirements, resignations, etc.

WORKFORCE PLANNING TEMPLATE

A guide that assists Agencies with identifying, interpreting, and analyzing workforce information that is compiled into a summary or report.

WORKFORCE PLANNING TOOL

A guide to assist Agencies with collecting, interpreting, and analyzing workforce information as an assessment to be used to further support workforce planning efforts or be imported into a template.

WORKING TITLE

Title of the position designated by the Agency.

2.0 Workforce Planning Definitions

IDENTIFYING CRITICAL ROLES TOOL

A separate tool that assists agencies with creating a custom assessment to determine criticality, distributing the assessment, tracking completions, and summarizing assessment data.

WORKFORCE PLANNING AGENCY PROFILE

A separate tool that serves as the foundation for workforce planning and development. It houses general agency information that can then be imported into the suite of integrated workforce planning tools.

3.0 Agency Profile Template Definitions

AGENCY DETAILS TAB:

This tab is part of the Workforce Planning and Development Agency profile and identifies general information of the agency, such as name, secretariat, number, and logo. It also captures the total number of positions at the agency, leader positions, and executive positions by EEO code and Classification. It provides the agency options to identify internal departments or sub-agencies for future tools. It also captures information of other strategic initiatives that may impact areas of workforce planning and development.

AGENCY LOCATION:

Represents a physical location of the agency or a group of physical locations in close proximity.

AGENCY MISSION

A brief description of the purpose of the Agency, to potentially include their vision, expectations, strategic priorities, and how they meet the needs of those they serve.

AGENCY STRATEGIC PLAN INFORMATION

The Agency Strategic Plan Information outlines objectives and action items the agency is currently working towards that could be impacted by workforce planning efforts (continuity of operations, recruitment, retention and engagement, and workforce development).

AGENCY WORKFORCE TAB

This tab is part of the Workforce Planning and Development Agency profile and identifies general workforce demographic information to include gender, race, EEO code, classification, veteran status, and employees with disabilities. Leaders and Executives at the Agency are also broken down by these categories.

CALCULATING EMPLOYEE DEMOGRAPHICS:

Counts the total number of each demographic group in the data report (SecurePass, Cardinal, or Blank Template) to determine the total number of employees for each. Employees with Disabilities are calculated for any data values that are "yes". Veterans are calculated by counting any values that are "Veteran".

The same calculations are used for leader positions, with the additional criteria of the position number being identified as a Supervisor. For executives, the same calculations are used with the additional criteria of the position number being identified as executives on the Customization Tab.

CUSTOMIZATION TAB:

This tab is part of the Workforce Planning and Development Agency Profile that allows an agency to identify the types of employee classifications at the agency, identify positions that are part of the executive team, identify additional parameters for calculating retirements, and a custom map of transaction types from the HR systems (if desired).

DEGREE FROM AGENCY HEAD

The number of organizational levels between the position and agency head. For example, a position that is a direct report to the Agency Head, would be 1 degree of separation.

FISCAL YEAR 2022 EMPLOYMENT OPPORTUNITIES PLAN:

This was the plan that was released in April of 2022 for Fiscal Year 2022 (July 1, 2021 to June 30, 2022) and was an Excel based template.

INTERNAL DEPARTMENT:

Specified the Agency, represent internal group or departments at the agency to be used as additional filters or in the Internal Department/Sub-Agency or Division Review Tool.

LINE OF SERVICE:

A modified approach to the traditional "line of business". Lines of Service are how the agency meets the needs of those they serve and achieve their missions.

PRIOR VERSION OF THE AGENCY PROFILE:

Any previous version of the Agency Profile. The version number is located on the Home Tab on the bottom right hand corner. The current version can be found on the DHRM Workforce Planning webpage.

SUB-AGENCY OR DIVISION:

Specified by the Agency, represent any self-sufficient agencies or areas of an agency. An example could be the individual community colleges across the Commonwealth that make up the Virginia Community College System.

TOTAL EXECUTIVE POSITIONS:

Employees at the Agency in the specific positions identified by the Agency as part of the executive team, which may be broken down by several workforce demographic categories.

4.0 Agency Strategy Template Definitions

AGENCY STRATEGY

The Agency Strategy refers outlines objectives and action items the agency expects to take to achieve goals or strategic priorities. Regarding the Employment Opportunities Plan, these refer to the goals, initiatives, and actions the agency expects to take to promote the employment of individuals with disabilities.

APPLICANTS / HIRES

Number of applicants to positions by various categories and demographics for all applicants, applicants to leader positions, applicants to executive positions. Number of Hire to positions by various categories and demographics for all hires, hires to leader positions, hires to executive positions

CONTINUITY OF OPERATIONS

The workforce planning area that focuses on critical elements of the workforce that could significantly impact the agency operations; to include critical roles, retirements, and executive risk.

FILLED / VACANT POSITIONS

Filled positions by various categories for all positions, leader positions, and executive positions
Vacant positions (as of June 30th of the reporting fiscal year) by various categories for all positions, leader positions, and executive positions

FORMAL INTERNSHIP PROGRAM

Agency internship program with formal infrastructure designed to attract and employee interns on a regular and on-going basis.

FY21 WORKFORCE PLANNING AND DEVLEOPMENT TEMPLATE

This was the plan that was released for Fiscal Year 2021 (July 1, 2020 to June 30, 2021) and was an Excel Based Template.

IDENTIFYING CRITICAL ROLES TOOL

A separate tool created by DHRM that allows for agencies to create a custom assessment to identify critical roles, collect information from that assessment, and then utilize a brief summary to explore assessment results. Data from completed assessments can be imported into the Agency Strategy to identify metrics related to critical positions.

INTERNSHIPS

An internship is a form of experiential learning that integrates knowledge and theory learned in the classroom with practical application and skills development in a professional setting. Internships give students the opportunity to gain valuable applied experience and make connections in professional fields they are considering for career paths; and give employers the opportunity to guide and evaluate talent. Internships provide a learning experience that provides for applying the knowledge gained in the classroom. It does not serve to only advance the operations of the employer or be the work that a regular employee would routinely perform. Internship length may vary and may include several weeks,

several months, year-long, and micro-internships that may be structured around a project and the number of hours required to complete that project.

OBJECTIVE ACTION ITEMS

Action items are the specific actions the agency intends to take in order to meet the strategy objectives. Action items should be specific, describing what the action is, how it will be measured, and a potential timeframe for the action to be completed.

RECRUITMENT

The workforce planning area that focuses on applicant and hiring trends at the agency, focusing on position information (including critical positions) and demographics, and time to fill of positions.

RETENTION AND ENGAGEMENT

The workforce planning area that focuses on the retention and engagement of employees, which makes up the majority of the workforce metrics to understand how employees move within or out of the agency.

RETIREMENT ELIGIBILITY

By default, retirements are identifies as employees who are at least 65 years of age with at least 5 years of service. However, the agency is able to add additional parameters to identify retirement eligibility in the Agency Profile template.

STRATEGY OBJECTIVE

An objective of the strategy is a general or broad statement to illustrate what the agency intends to do in order to achieve their goals or strategic priorities.

TIME TO FILL

Average time to fill positions by various categories for all positions, leader positions, and executive positions. Average time to fill positions by various categories for all positions, leader positions, and executive positions for each fiscal year quarter.

WORKFORCE DEVELOPMENT

The workforce planning area that focuses on assisting agencies with answering the question "how does the agency develop its workforce" by exploring development types, impacts, and participant demographics.

WORKFORCE PLANNING AREAS

The Workforce Planning areas this template focuses on are continuity of operations, recruitment, retention and engagement, and development.

WORKFORCE PLANNING CRITICAL ROLES

The positions that impact the agency mission, operations, quality, strategy and customer engagement (Citizens of the Commonwealth). If unfilled, these positions can have a significant negative impact on executing the agency's mission.

5.0 Identifying Critical Roles Tool Definitions

ADDITIONAL ASSESSMENT PARAMTERS

Refers to additional parameters for each assessment areas identified by the Agency. Additional parameters can be indicated to be in addition to or alongside the overall assessment parameter for a position to be identified as critical.

ADDITIONAL ASSESSMENT QUESTIONS

Corresponds to custom questions Agencies can include in their Critical Roles Assessment and are not limited to the specific areas of the core assessment questions.

ADDITIONAL ASSESSMENT SCALE

A custom scale to provide additional data labels to any additional questions added. Each scale level (1-6) can be given a custom description to match any additional questions that do not align with the built in question scales.

ASSESSMENT DATE

Refers to the date the assessment was created, as entered by the Agency.

ASSESSOR NAME

Name of the individual who will be completing the assessment for the specific position.

ASSESSMENT QUESTIONS

Corresponds to the questions of the Critical Roles Tool Assessment, which focus on the areas of Vacancy Risk, Recruitment, Learning and Development, Knowledge Management, Operational Impact, Strategic Objectives Impact, Impact from the Environment, and Position Specific questions.

BUILD ASSESSMENT TAB:

The Build Assessment Tab of the Identifying Critical Roles tool allows agencies to choose specific questions to be included in their assessment, add additional questions, and outline the measures required for a position to be identified as critical.

CRITICAL ROLES SUMMARY TAB:

The Critical Roles Summary tab provides an overall breakdown of positions identified as critical, responses to each criticality area and question, and a list of the assessment results for each position. The summary can be exported as an individual PDF.

DATA COLLECTION PROCESS

Identifies how the Critical Rolls Tool Assessment Data is to be collected, either from others or the individual using the tool.

DATA COLLECTION TAB:

The Data Collection Tab of the Identifying Critical Roles tool allows agencies to specify how data is to be collected, either from others or an individual entering it in themselves. If collecting data from others, the tool can serve as a tracker of which assessments have been created and which have been returned for each position.

OVERALL ASSESSMENT PARAMETER

Refers to the Agency defined overall score that must be met or exceeded in order for a position to be identified as critical.

OVERALL ASSESSMENT SCORE

Refers to the total Critical Roles Assessment score, calculated by adding together the total score for each assessment area.

WORKFORCE PLANNING CRITICAL ROLES

The positions that impact the agency mission, operations, quality, strategy and customer engagement (Citizens of the Commonwealth). If unfilled, these positions can have a significant negative impact on executing the agency's mission.

6.0 Employment Opportunities Plan Definitions

[AGENCY PROFILE TAB \(Within EOP\)](#)

This tab corresponds directly to the Workforce Planning and Development AGENCY PROFILE tool, but only includes the information pertaining to the Employment Opportunities Plan.

[AGENCY STRATEGY](#)

The Agency Strategy refers outlines objectives and action items the agency expects to take to achieve goals or strategic priorities. Regarding the Employment Opportunities Plan, these refer to the goals, initiatives, and actions the agency expects to take to promote the employment of individuals with disabilities.

[EXECUTIVE TEAM \(FOR EOP\)](#)

Agency Head and Direct Reports.

[FISCAL YEAR 2021 EMPLOYMENT OPPORTUNITIES PLAN](#)

This was the plan that was released for Fiscal Year 2021 (July 1, 2020 to June 30, 2021) and was an Excel based template.

[FISCAL YEAR DEMOGRAPHICS CHART](#)

The chart that displays the total percentage of employees with disabilities and the breakdown of employees with disabilities as leaders/supervisors, executives, and non-leaders.

[FISCAL YEAR ENTRY / EXIT CHART](#)

A bar chart that shows applicants and hires vs. voluntary separations and external transfers of employees with disabilities at the agency for the selected fiscal year and demographic group.

[INTERNAL MOBILITY CHART](#)

A bar chart that shows the total number of internal promotions and internal transfers of employees with disabilities at the agency for the selected fiscal year and demographic group.

[LEADER / SUPERVISOR \(FOR EOP\)](#)

Individuals with at least 2 direct reports.

[WORKFORCE DATA TAB \(With EOP\)](#)

This tab houses specific workforce information pertaining to the employment of individuals with disabilities, to include recruitment, alternative application, and retention information.