



# STRATEGIC WORKFORCE PLANNING

RESILIENCE • RECRUITMENT • ENGAGEMENT • RETENTION • DEVELOPMENT

## AGENCY STRATEGY



## INSTRUCTIONAL GUIDE

*UPDATED: MAY 2024*

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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.

In 2022, 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.

In 2024, DHRM incorporated key learnings and feedback over the last few years to reorganize the template to align with the [DHRM Strategic Workforce Planning webpage](#). The template focuses on three phases of workforce planning (workforce analysis, strategy development, and implementation), with the required information being significantly reduced to allow agencies to be able to better translate data analytics to strategic objectives. Further, rather than dividing the data analysis process by each workforce planning area, the data is divided by the degree of analysis (foundational in-depth, and comprehensive).

As a reminder, all tools and templates for elements related to workforce planning are always available on the DHRM website.



**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 the entire workforce planning process 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 houses general information about the agency, such as the name, mission, executive team, etc. Agencies also have the ability to include strategic objectives from other agency plans, such as the Employment Opportunities Plan, to better align workforce planning initiatives with agency strategic priorities.
- **Foundational** – The Foundational tab identifies all required information for each workforce planning area to create the workforce plan. It focuses on providing overall totals for key metrics and metrics for critical roles to support a data driven approach to strategic workforce planning.
- **In-Depth (Optional - initially hidden until enabled)** – The In-depth tab breaks down metrics from the foundational tab for leaders and executives at the agency. It also includes elements related to workforce engagement, such as survey details, events, employee recognition, and development program details. Agencies can customize which fields are visible and which data to enter.
- **Comprehensive (Optional - initially hidden until enabled)** – The Comprehensive tab further breaks down the key metrics by EEO Code, classification, gender, race, disability, and veteran status. Agencies can customize which fields are visible and which data to enter.
- **SWOT** – The SWOT Tab enables agencies to conduct an environmental analysis of aspects that may impact their workforce. Agencies can enter up to five strengths, weaknesses, opportunities, and threats and describe why the item is considered to belong to the respective area.

- **Risk & Preparedness**– The Risk and Preparedness tab enables agencies to identify the level of risk, their current preparation level, and what is needed to meet the objective for any strategic objective outlined in the Agency Profile tab.
- **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.
- **Appendix (Optional – initially hidden until enabled)** – The Appendix serves as an extension of the WFP summary tab, providing the data elements from the In-Depth and Comprehensive tabs. Information can be customized to the optional data entered.
- **Implementation (Optional)** – The Implementation tab enables agencies to outline ownership and timelines of action items in their workforce strategy and track their progress. Though this is optional to use, it can provide significant benefit for future years when updating the workforce plan.

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 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.



## 4.0 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.

### Flag Feature

On the navigation bar at the top of each tab is the ability to “flag” an item. This highlights the cell in yellow and red text, as well as allows the individual to add a threaded comment that others can reply to. This can help to increase internal collaboration on the workforce plan.

#### Add a Flag

To add a flag, first click on the cell to be flagged and then click the yellow “Flag Item” button on the navigation bar at the top.

The screenshot shows the 'FOUNDATIONAL ANALYSIS' tab. The navigation bar at the top includes buttons for HOME, AGENCY PROFILE, IN-DEPTH ANALYSIS, SWOT ANALYSIS, AGENCY STRATEGY, IMPLEMENTATION NOTES, GETTING STARTED, FOUNDATIONAL ANALYSIS, COMPREHENSIVE ANALYSIS, RISK & PREPARATION, WFP SUMMARY, FLAG ITEM, and CLEAR FLAG. The 'FLAG ITEM' button is highlighted in yellow. A red arrow points to it with the text '2. Click the “Flag Item” Button'. Below the navigation bar, the 'FOUNDATIONAL ANALYSIS' section is displayed. It includes a description: 'This tab includes all required, or foundational, data elements for the workforce plan. These focus on providing totals for key data points, a breakdown by agency critical roles, and specific information on the executive team to meet mandated requirements.' Below this, there is a section titled 'Step 1: Enter Overall Agency Information' with a pink 'Incomplete' status bar. Instructions state: 'Please enter the total number of employees or positions for the respective data fields, focusing on overall aspects of the agency, in the yellow boxes below. Executive positions are those noted on the Agency Profile tab.' A table titled 'Maximum Employment Level' is shown with columns for 'FY-2', 'FY-1', and 'FALSE'. The 'FY-2' and 'FY-1' cells are highlighted in yellow. A red arrow points to the 'FY-2' cell with the text '1. Click in the Cell to be Flagged'.

A dialog box will show to enter a reason why the item is flagged. This can be a quick note or a detailed description but should be enough to serve as a reminder for yourself or describe the reason to another individual.

The screenshot shows a dialog box titled 'Flag Description'. It contains a text input field with the placeholder text 'Why is this item flagged?'. Below the input field are two buttons: 'OK' and 'Cancel'. A red arrow points to the 'OK' button with the text '2. Click OK'. Another red arrow points to the input field with the text '1. Enter a reason'.



Once the item is flagged, it will appear yellow with red text. The reason entered will appear as a threaded comment when clicking on or hovering over the cell. You can continue to add notes to the comment by clicking the “reply” button or others can reply as well.

The screenshot shows the 'FOUNDATIONAL ANALYSIS' tab. A table titled 'Maximum Employment Level' has columns for 'FY-2', 'FY-1', and 'FALSE'. The 'FY-2' cell contains the value '10' and is highlighted in yellow. A comment thread is visible for this cell, showing a user 'Kinney, Christopher (DHRM)' with a timestamp 'May 20, 2024, 1:05 PM'. A 'Reply' button is visible at the bottom of the comment thread.

Click reply to add to comment thread.

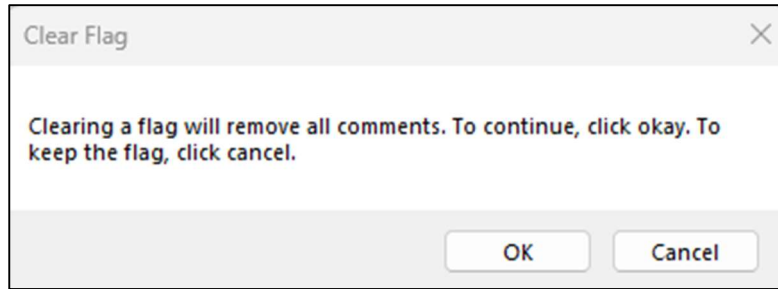
### Remove a Flag

To remove a flag, click on the cell with the flag and then click the “Clear Flag” button on the navigation bar at the top of the tap. This will return the cell to its original format and remove the comments. A message will appear confirming the removal of the flag and comments.

The screenshot shows the 'FOUNDATIONAL ANALYSIS' tab. The 'Maximum Employment Level' table is visible. The 'FY-2' cell contains the value '10' and is highlighted in yellow. In the top navigation bar, there is a 'CLEAR FLAG' button. A red arrow points from the 'CLEAR FLAG' button to the 'FY-2' cell, indicating the steps to remove the flag.


2. Click the “Clear Flag” Button

1. Click in the Cell with the Flag to be removed

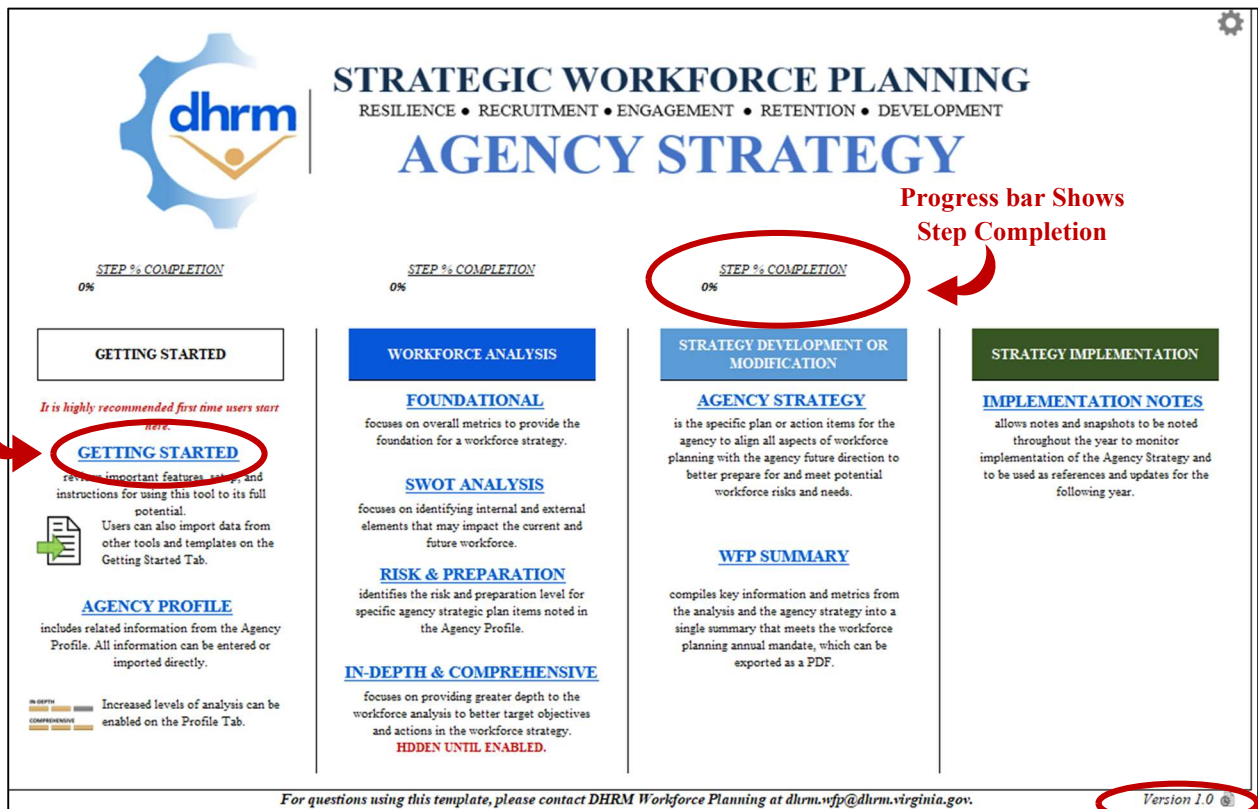


2. Click OK to clear flag and remove comments.

## 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.



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

Progress bar Shows Step Completion

Version Number of the Template

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 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**.

**Level of Analysis**  
FOUNDATIONAL

**Step Number and Title**  
**Step 1: Enter Position (Filled and Vacant) Information**

**Complete / Incomplete Indicator for Step**  
**Incomplete**

**Instructions on how to complete the step**  
**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.

**Sub-Step Number and Title**  
**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.

**Description of what data to enter in the cell**

	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"		






**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**

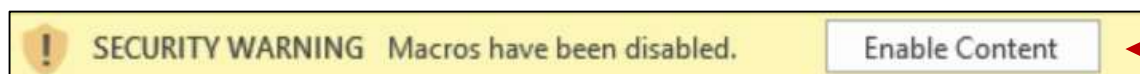
The Getting Started tab provides a breakdown of the important features of the template, used to assist with entering and interpreting workforce information. Below are descriptions of the template's key features.

	<p><b>USE OF EXCEL MACROS</b></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. <b>NOTE: Excel Macros must be enabled to use them.</b> The template can also be used without the Macros, but will require some manual edits.</p>
	<p><b>EASY FILE NAVIGATION</b></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><b>COLOR CODED DATA ENTRY</b></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><b>BUILT-IN HELP FEATURES</b></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. <b>NOTE: Macros must be enabled. The template cannot be edited while help windows are open.</b></p>
<p><b>COMPLETE</b> <b>INCOMPLETE</b></p>	<p><b>PROGRESS INDICATORS</b></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><b>DATA IMPORT</b></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. <b>NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</b></p>

	<p style="text-align: center;"><b>EASILY REVIEW PRIOR INFORMATION</b></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. <b>NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</b></p>
	<p style="text-align: center;"><b>TEMPLATE VERSIONS</b></p> <p>As we continue to enhance this template, integrate it with other elements of workforce planning and development, or as changes to any mandates or guidance occurs, new versions of this template may be released. The version number is located on the Home tab in the bottom right corner.</p> <p>It is important to be using the most up to date version, which will be noted on the DHRM Workforce Planning Website. As new versions are released, the prior version data can be imported so no progress is lost.</p>
<p><b>FOUNDATIONAL</b></p>  <p><b>IN-DEPTH</b></p>  <p><b>COMPREHENSIVE</b></p> 	<p style="text-align: center;"><b>INCREASING LEVELS OF ANALYSIS</b></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**

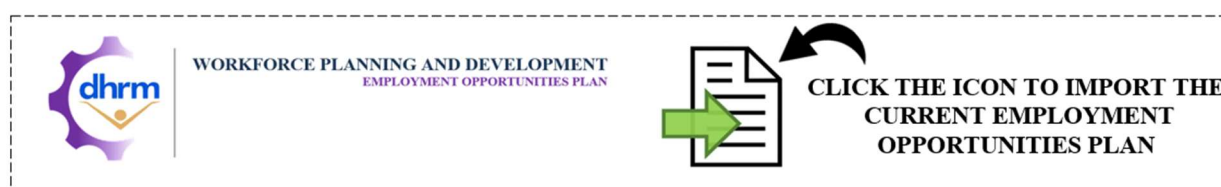
For efficiency and integration to other workforce planning and development tools, data from other sources can be imported. Imported data, shown in the table below, will automatically enter the information into the respective cells. Agencies are encouraged to still review the information for accuracy.



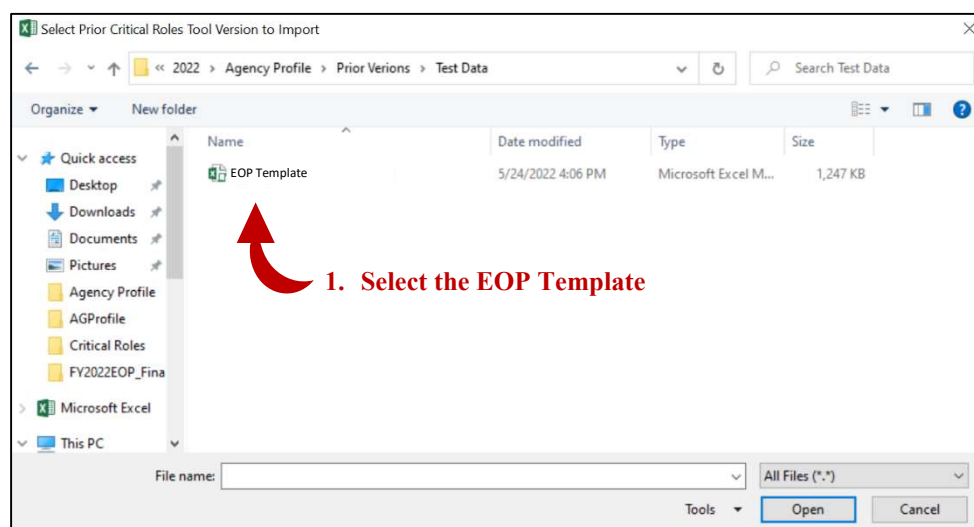
Data Source	Data Imported
Employment Opportunities Plan (EOP)	Objectives from Workforce Strategy of Employment Opportunities Plan
Prior Year Agency Strategy*	Using the EEO Code breakdowns from the prior year, data is calculated to match the new fields on Foundational Tab Agency Strategy Objectives & Actions Items Prior Year Updates to Strategic Objectives

The example below is how to import data from the Employment Opportunities Plan 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..



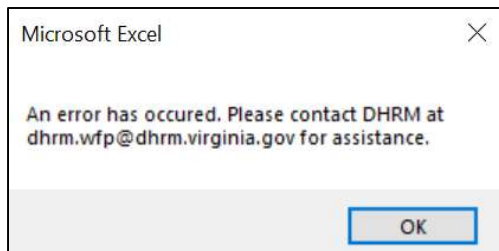
This will open the standard “Open File” dialog box. Simply locate and select the previous version Employment Opportunities template and click “Open”. (Shown in the picture below).



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

<i>Last Uploaded Date and Time</i> 4/12/2022 14:55	<i>Upload Status</i> Upload Complete 
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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](mailto:dhrm.wfp@dhrm.virginia.gov).



## Agency Profile Tab

The Agency Profile Tab houses general information to be entered into the template.

### 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” blue button, selecting the logo picture file, and then resizing the image to be within the green outlined box.

#### *Step 1: Enter Agency Information*

*Incomplete*

**INSTRUCTIONS:** Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. Please also enter a brief description of the agency mission in the respective yellow box below. An optional logo can be added by using the blue "Insert Logo" button and then resized using the "Resize" blue button.

Click the blue button to add an *Optional Agency Logo* (instructions below)

Agency Name

Secretariat

Agency Number

Optional Agency Logo

Agency Mission

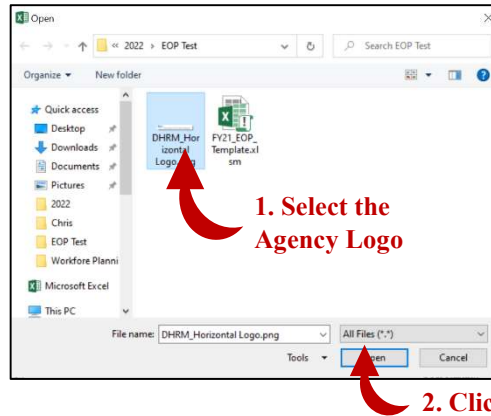
1. Click on Arrow to See Dropdown.

2. Select Agency from Dropdown.

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.**



The logo should be added to the cell with box outlined. The logo appears on the WFP and appendix.



the green summary

2. Click Open

### **Step 2: Select if the template is for the FY Workforce Plan or Snapshot in Time**

To complete step two, select whether the template is being used for the fiscal year workforce plan or for a snapshot in time of the workforce and then enter the corresponding date. If it is for the fiscal year workforce plan, enter the end of the fiscal year date. If it is for a snapshot, enter the “as of” date.

*Step 2: Specify if the template is used for the FY Summary or to take a Workforce Snapshot*

*Incomplete*

**INSTRUCTIONS:** Please select whether the agency is using this template to complete the mandated fiscal year workforce plan or to take a workforce snapshot from the drop down menu in the yellow box. After, please enter the end of the fiscal year or the “As of” date.

Is this for the Fiscal Year WFP or a Snapshot of the Workforce? Date:

1. Click on Arrow to See Dropdown.

2. Enter the corresponding date.

### **Step 3: Identify Classifications Included**

To complete step 3, enter the title and a brief description of employee classification the agency uses (such as Classified, Wage, Agency Head, Other Non-Classified, etc.) by clicking the blue “Add Employee Classification” button to show the entry boxes (shown in the picture below). Up to 15 employee classifications can be added.

**Classification are only used in the comprehensive analysis. However, the classifications included in the template are noted on the WFP summary.**

Repeat this process for each additional classification to be added. **If Not Using the Excel Macros, Skip to Step 3(a)**

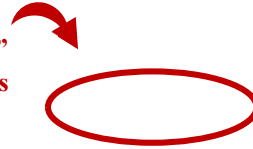
*Setup Employee Classifications*

Add Classification

Remove Last Classification

Classification Title	Description (Very Brief)

1. Click the “Add Employee Classification” button again to add up to 15 Classifications



Classifications can be removed by clicking the blue “Remove Last Classification” button. This will remove the last employee classification was added.

2. Enter the Classification Title in the Yellow Box

3. Enter a brief description of the Classification

Setup Employee Classifications

Add Classification

Remove Last Classification

Click to Remove Last Added Classification

Classification Title	Description (Very Brief)

### (Optional) Step 3(a): Enter Employee Classifications without Macros

If the blue buttons were used to enter the Employee Classifications, this step can be skipped.

In the event Macros are not being used, the Employee Classifications can be entered by first entering the total number of classifications in the green box.

#### (Optional) Enter Classifications if Not Using Macros

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

Number of Different Classifications Included

1. Enter the Total Number of Employee Classifications

After the number is 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.

2. Click the filter Icon to show filter menu

3. Verify "0" is unchecked

4. Click Ok

Scroll up on the sheet to see the entry boxes for the number of employee classifications. The number of Employee Classifications can be changed using this same process.

#### Step 4: Identify Agency Executive Team

To complete step 4, first enter a brief description of the Agency Executive Team or the process used to identify Executive Team positions in the yellow box (shown in the picture below).

1. Enter Executive Team Description

Next, enter the position number, working title, degree from the Agency Head (number of leadership levels at the Agency), and if the position is an appointed position for any positions the Agency identifies as part of their executive team by clicking the blue “Add Executive Position” button to show the entry boxes (shown in the picture below). Up to 30 executive positions can be added. **If Not Using the Excel Macros, Skip to Step 4(a).**

**1. Click the “Add Executive Position” button again to add up to 40 Positions.**

*Step 4(a): Identify Executive Team Positions*

Position Number	Working Title	Degree from Agency Head	Appointed?

**2. Enter the Position Number**

**3. Enter the Working Title**

**4. Enter the Degree from the Agency Head**

**5. Select “Yes” or “No” if the position is appointed or not.**

To remove the last executive position, click the blue “remove last position” button.

*Step 4(a): Identify Executive Team Positions*

Position Number	Working Title	Degree from Agency Head	Appointed?

**Click to Remove Last Executive Position Added**

#### **(Optional) Step 4(a): Enter Executive Team without Macros**

**If the blue buttons were used to enter the Executive Team, this step can be skipped.**

In the event Macros are not being used, the executive team positions can be entered by first entering the total number of positions in the green box.

#### **(Optional) Enter Executive Positions if Not Using Macros**

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

Total Number of Executive Positions

**1. Enter the Total Number of Executive Positions**

After the number is 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.

**2. Click the filter Icon to show filter menu**

HOME AGENCY PROFILE IN-DEPTH ANALYSIS SWOT ANALYSIS AGENCY STRATEGY IMPLEMENTATION NOTES

GETTING STARTED FOUNDATIONAL ANALYSIS COMPREHENSIVE ANALYSIS RISK & PREPARATION WFP SUMMARY FLAG ITEM CLEAR FLAG

**Step 4: Enter Executive Team Information** Incomplete

**INSTRUCTIONS:** Please enter a brief description of how the agency identifies the Executive Team. After, please identify the specific positions considered to be a part of the executive team by clicking the "add position" button. Please enter the position number, working title, the degree of separation (position levels) from the agency head and if they are in an appointed position or not. Up to 30 positions can be added.

Executive Team Description and/or the Process of How Executive Positions were Identified:

**Step 4(a): Identify Executive Team Positions** Add Position Remove Last Position

Position Number	Working Title	Degree from Agency Head	Appointed?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**(Optional) Enter Executive Positions if Not Using Macros**

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

Total Number of Executive Positions:

HOME AGENCY PROFILE IN-DEPTH ANALYSIS SWOT ANALYSIS AGENCY STRATEGY IMPLEMENTATION NOTES

GETTING STARTED FOUNDATIONAL ANALYSIS COMPREHENSIVE ANALYSIS RISK & PREPARATION WFP SUMMARY FLAG ITEM CLEAR FLAG

**Step 4: Enter Executive Team Information** Incomplete

**INSTRUCTIONS:** Please enter a brief description of how the agency identifies the Executive Team. After, please identify the specific positions considered to be a part of the executive team by clicking the "add position" button. Please enter the position number, working title, the degree of separation (position levels) from the agency head and if they are in an appointed position or not. Up to 30 positions can be added.

Executive Team Description and/or the Process of How Executive Positions were Identified:

**Step 4(a): Identify Executive Team Positions** Add Position Remove Last Position

Position Number	Working Title	Degree from Agency Head	Appointed?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**(Optional) Enter Executive Positions if Not Using Macros**

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

Total Number of Executive Positions:

Sort Smallest to Largest

Sort Largest to Smallest

Sort by Color

Sheet View

☒ Clear Filter From "1"

Filter by Color

Number Filters

Search

☒ (Select All)

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The instructions below reference the Employment Opportunities Plan but the same process is used for each of the plans included in the template.

1. Click the “Add Objective” button for the respective plan.

*Include Employment Opportunities Plan (Up to 5 Objectives)*

Add Objective

Remove Last Objective

Objective 1

2. Enter the Objective or summary of the objective / action.

To remove the last objective, click the blue “remove last objective” button.

*Include Employment Opportunities Plan (Up to 5 Objectives)*

Add Objective

Remove Last Objective

Objective 1

Click to Remove Last Executive Position Added

Repeat this process for the remaining objectives and plans to be included in the agency workforce plan.

### **(Optional) Step 5(a): Enter Strategic Objectives if not using Macros**

**If the blue buttons were used to enter the Strategic Objectives, this step can be skipped.**

In the event Macros are not being used, the strategic objectives can be entered by first entering the total number of objectives for the respective plans in the green boxes.

#### **(Optional) Enter Items from Strategic Plans if Not Using Macros**

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

Total EOP Objectives  
Total Salary Administration Plan Notes  
Total Diversity, Opportunity, and Inclusion Goals  
Total Number of Notes from Other Strategic Plans

1. Enter the Number of Strategic Objectives for the plans



**2. Click the filter Icon to show filter menu**

**3. Verify "0" is unchecked**

**4. Click Ok**

**(Optional): Enable "In-Depth" Analysis Features**

**INSTRUCTIONS:** The "In-Depth" analysis includes additional breakdowns for leader and executive positions and specific items for each workforce planning area; Exit Survey information, Engagement Events, Employee Recognition, Workforce Development Details, and Workforce Development Support. To enable this and un-hide the "in-depth" analysis tab, click the toggle switch to turn it from "Off" to "On".

**NOTE: Macros must be enable to use the On/Off Enable switch. If not using macros, please contact DHRM for assistance at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).**

### **(Optional) Enable In-Depth and Comprehensive Analysis Tabs**

For further analysis, agencies can utilize the in-depth and comprehensive analysis tabs by enabling them on the Profile tab. This will unhide the respective tab, as well as an optional Appendix that can be attached to the workforce plan summary with the optional information.

**NOTE: Macros must be enabled to unhide these tabs. If not using macros, please contact DHRM at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).**

The instructions below are to enable the In-Depth tab, but the same process is used to enable the Comprehensive Tab. For more instructions on each of these tabs, see their respective section.

To enable the In-Depth Tab, click the toggle switch next to the respective step on the Profile tab. If not enabled, the toggle will be red and say "OFF". When enabled, the toggle will turn green and say "ON".

#### **(Optional): Enable "In-Depth" Analysis Features**

**INSTRUCTIONS:** The "In-Depth" analysis includes additional breakdowns for leader and executive positions and specific items for each workforce planning area; Exit Survey information, Engagement Events, Employee Recognition, Workforce Development Details, and Workforce Development Support. To enable this and un-hide the "in-depth" analysis tab, click the toggle switch to turn it from "Off" to "On".

**NOTE: Macros must be enable to use the On/Off Enable switch. If not using macros, please contact DHRM for assistance at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).**



**(Optional): Enable "In-Depth" Analysis Features**

**INSTRUCTIONS:** The "In-Depth" analysis includes additional breakdowns for leader and executive positions and specific items for each workforce planning area; Exit Survey information, Engagement Events, Employee Recognition, Workforce Development Details, and Workforce Development Support. To enable this and un-hide the "in-depth" analysis tab, click the toggle switch to turn it from "Off" to "On".

**NOTE:** Macros must be enable to use the On/Off Enable switch. If not using macros, please contact DHRM for assistance at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).



**Click to Toggle switch again to turn off.**

## Foundational Tab

The Foundational Tab houses all the required data information to calculate the respective metrics for the workforce plan. It covers areas to include information about the agency, organizational resilience, recruitment, retention and engagement, and workforce development.

To complete each step, enter the respective information in the yellow box. The green boxes for the prior years are optional to include. Below is an example of entering the information in for the Maximum Employment Level (MEL) but the process is repeated for each data point.

Maximum Employment Level

	FY-2	FY-1	FALSE
Maximum Employment Level			

**1. Enter the respective data in the yellow box.**

**NOTE, the data for the question “Did the Agency employ interns in the reporting fiscal year?” requires the agency to select either “yes” or “no” from the dropdown. All other required entry fields is typed in.**

Below are the data points for each specific section.

Foundational Tab Section	Types of Required Information
Overall Agency Information	Maximum Employment Level Total Number of Positions Total Number of Employees Total Number of Executive Positions Total Number of Appointed Executive Positions Total Number of Executive Employees
Organizational Resilience	Positions Assessed for Criticality Positions Identified as Critical Executive Positions Identified as Critical Current Retirement Eligibility Five Year Retirement Eligibility
Recruitment	Applicants* Hires* Filled Positions* Vacant Positions* Average Time to Fill*

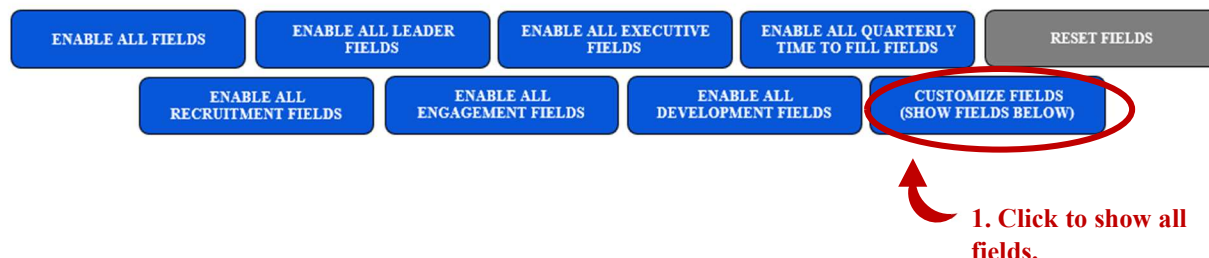
	<i>*both total and for critical roles</i>
Retention & Engagement	Average Years of Service* Internal Promotions* Internal Transfers* External Transfers* Voluntary Separations* Exit Survey Information <i>*for critical roles, first five years, and first year</i>
Workforce Development	Internships Participation in Internal Development Participation in External Development

To complete the Foundational Tab, repeat the process of entering information into the yellow boxes for each set of data from the table above.\

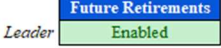
## In-Depth and Comprehensive Analysis Tabs

The In-Depth and Comprehensive analysis tabs use the same process as the Foundational tab with a few exceptions. First, the specific data fields are initially hidden from view until selected. The blue buttons at the start of the tab can enable specific sections of data entry, or, a custom selection can be used.


For the In-Depth Tab, below are the buttons that enable specific fields. To customize the selection, click the “Customize Fields” button to see all possible fields.




**2. Select “enabled” from the dropdown for the respective field.**



**3. Click “Refresh” Worksheet to show fields.**



**4. Click “Hide Custom Field Selection” to hide the field selection.**



Refresh Worksheet to See Fields

Click button to hide these custom fields.

REFRESH WORKSHEET FIELDS

HIDE CUSTOM FIELD SELECTION

To reset the fields, click the gray “Reset Fields” button. This will make all fields “hidden” and hide their rows.



After selecting the respective field, enter the information using the same process as the Foundation Tab. However, there are no “yellow” boxes, as all information on the In-Depth and Comprehensive tabs are optional.

**Employee Totals**

	FY-2	FY-1	FALSE
Total Number of Leader Positions			
Total Number of Leader Employees			
Total Number of Leader Employees in their First 5 years			
Total Number of Leader Employees in their First Year			

**Enter the respective data in the green boxes for the respective year.**

There are no Complete/Incomplete indicators on the In-Depth or Comprehensive tabs, as these are not required for the workforce plan.

This process is repeated for the Comprehensive tab. Below are the potential data fields for the Comprehensive tab.

ENABLE ALL FIELDS	ENABLE ALL EEO CODE FIELDS	ENABLE ALL CLASSIFICATION FIELDS	ENABLE ALL SEX FIELDS	RESET FIELDS
ENABLE ALL RACE FIELDS	ENABLE ALL VETERAN / DISABILITY FIELDS	ENABLE LAYER FOR LEADERS	ENABLE LAYER FOR EXECUTIVES	CUSTOMIZE FIELDS (SHOW FIELDS BELOW)

## SWOT Analysis Tab

The SWOT Analysis tab has agencies conduct a SWOT Analysis to examine their strengths, weaknesses, opportunities, and threats related to their workforce and their internal and external environment. Up to 5 items can be added for each category.

### Step 1: Complete a SWOT Analysis

This tab only has one step, to complete the analysis, which requires at least one item be added for each category of the analysis. Below are the instructions to enter a Strength, but the process is repeated for the remaining sections of the analysis.

To add a Strength, click the blue “Add Strength” Button and then enter a title for the strength (very short), a brief description, and then answer the question of why it is considered a strength.

1. Click the “Add Strength” button.

#### Step 1(a): Enter Agency Strengths

**INSTRUCTIONS:** 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 workforce needs. Click on the "Add Strength" button and then enter a title for the strength and a description that answers the question, "why is it a strength?". Up to 5 strengths can be added.

Strength Title	Strength Description	Why is it a Strength?

2. Enter a Title.

3. Enter a description.

4. Answer the question why it is considered a strength.

To remove the last strength, click the blue “Remove Last Strength” button.

#### Step 1(a): Enter Agency Strengths

**INSTRUCTIONS:** 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 workforce needs. Click on the "Add Strength" button and then enter a title for the strength and a description that answers the question, "why is it a strength?". Up to 5 strengths can be added.

Strength Title	Strength Description	Why is it a Strength?

Click to Remove Last Strength Added

### **(Optional) Step 1(a): Enter SWOT Analysis if not using Macros**

**If the blue buttons were used to enter the SWOT Analysis, this step can be skipped.**

In the event Macros are not being used, the elements of the SWOT analysis can be entered by first entering the total number of items for each element (up to 5) for the respective area of the analysis.

#### **(Optional) Enter SWOT Analysis Items if Not Using Macros**

*If chosen not to use Macros, please enter the total number of items to include for each area of the SWOT Analysis. 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 executive positions information in the cells above.*

Number of Strengths  
Number of Weaknesses  
Number of Opportunities  
Number of Threats

**1. Enter the Number of Items for Each Area**

The screenshot shows the 'SWOT ANALYSIS' tab in a spreadsheet. The 'INSTRUCTIONS' section states: 'Strengths are elements **EXTERNAL** to the Agency (defined as being within the control of the Agency) that **INHIBIT** an Agency's ability to meet the agency's workforce needs. Click on the "Add Threat" button and then enter a title for the strength and a description that answers they question, "why is it a threat?". Up to 5 threats can be added.' Below this, the '(Optional) Enter SWOT Analysis Items if Not Using Macros' section contains the same text as the previous block. At the bottom right, there are four input fields for 'Number of Strengths', 'Number of Weaknesses', 'Number of Opportunities', and 'Number of Threats', each with a dropdown arrow.

**2. Click the filter Icon to show filter menu**

The screenshot shows the same worksheet as before, but with the filter menu open for the 'Number of Strengths' input field. The menu includes options like 'Sort Smallest to Largest', 'Sort Largest to Smallest', 'Sort by Color', 'Clear Filter From "1"', 'Filter by Color', 'Number Filters', and a search bar. The '0' option is selected, and the 'OK' button is highlighted at the bottom of the menu.

**3. Verify "0" is unchecked**

**4. Click Ok**

## Risk and Preparedness Tab

To update the tab to reflect the strategic objectives outlined in the Agency profile, the tab will need to be refreshed. If the tab needs to be refreshed, the indicator will display “Objectives Need to be refreshed”. 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 Risk and Preparedness to Meet Strategic Objectives

There is only one step to complete the Risk and Preparedness Tab. For each of the strategic objectives noted on the Profile tab, identify whether the objectives is in the top three priorities of the agency, the risk of not achieving the objective, the current level of preparedness, and outlining what is needed to meet the objective.

The instruction below are for an example objective of the Employment Opportunities Plan but the process is the same for each objective shown. To add or remove an objective, follow the instructions in the Profile Tab section.

**Employment Opportunities Plan Objectives**

Objective 1	Example Objective	
	Is this one of the top 3 strategic priorities of the Agency?	<input type="text"/>
	Enter the level of risk the agency will <b>NOT</b> meet this objective (between 1 and 100)	<input type="text"/>
	Enter the current preparedness of the Agency to meet this objective (between 1 and 100)	<input type="text"/>
	What does the agency workforce need to meet this objective?	<input type="text"/>

1. Select level of priority (either 1, 3, or 3, or no).

2. Enter a number between 1 and 100 for the risk and preparation. The charts will update.

3. Enter what is needed to meet this objective.



## 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.

### **Step 1: Outline Your Workforce Strategy Themes**

To complete Step 1, answer the two prompt questions of “How do you want a prospective employee to imagine their work experience at your agency?” and “How would you want an employee leaving the agency to describe their work experience?” in their respective yellow boxes (shown below).

#### ***Step 1: Outline Your Workforce Strategy Themes***

***Incomplete***

***INSTRUCTIONS:*** Establishing an overall theme can support alignment between objectives and actions of a strategic plan. Please answer the following two questions, which can serve as guideposts to outlining specific workforce strategy objectives and actions.

How do you want a prospective employee to imagine their work experience at your agency?

How would you want an employee leaving the agency to describe their work experience?

### **Step 2: Outline Your Workforce Strategy Objectives and Actions**

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 2: Outline Your Workforce Strategy Objectives & Actions***

***Incomplete***

***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. 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

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. 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. A brief summary of progress can be added by clicking the "Add Progress Update" button for existing objectives.

The diagram illustrates the process for adding a new objective and its associated action items. It features a form with two main input areas: "Objective Title" and "Overall Objective Statement". Below these are three buttons: "Add Action Item", "Remove Last Action Item", and "Add Progress Update". Red arrows and numbers indicate the steps: 1. Add a Title (pointing to the "Objective Title" field), 2. Enter the Objective (pointing to the "Overall Objective Statement" field), and 3. Click to add Action Item (pointing to the "Add Action Item" button). A separate arrow points to the "Remove Last Action Item" button with the text "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).

The diagram shows the process to remove the last objective and its action items. It features two buttons: "Add Objective" and "Remove Last Objective". A red arrow points to the "Remove Last Objective" button with the text "1. Click to remove last Objective and Action Items".

For Objectives that were carried over from the prior year, a progress update can be added. By clicking the "Add Progress Update" Blue button.

### Objective 1

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. 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. A brief summary of progress can be added by clicking the "Add Progress Update" button for existing objectives.

The diagram shows the process to add a progress update to an existing objective. It features a form with two main input areas: "Objective Title" and "Overall Objective Statement". Below these are three buttons: "Add Action Item", "Remove Last Action Item", and "Add Progress Update". A red arrow points to the "Add Progress Update" button with the text "1. Click to Add Progress Update".

To view an update from the prior year, click on the “Show Prior Year Progress Update” Icon. To hide the prior year progress update, click the “Hide Prior Year Progress Update Icon”.



### **(Optional) Step 2(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	
Total Action Items for Objective	
Total Action Items for Objective	
Total Action Items for Objective	
Total Action Items for Objective	
Total Action Items for Objective	

1. Enter the Total Number of Strategic Objectives

2. Enter the number of action items for each objective

HOME	AGENCY PROFILE	RECRUITMENT	WORKFORCE DEVELOPMENT	AGENCY STRATEGY (CURRENT TAB)
GETTING STARTED	CONTINUITY OF OPERATIONS	RETENTION & ENGAGEMENT	FUTURE DIRECTION	WF PLANNING SUMMARY

#### ***(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	

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
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 2 to complete the step.

### **(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

## **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 then 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: 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 2: Enter Key Findings, Highlights, or Key Observations on the Metrics Page**

To complete Step 2, enter a very brief 2-3 sentence description of any key highlights that a senior leader should be aware of when reviewing the key data metrics in the yellow box at the top of the Workforce Metrics, Retirements, and Executive Team page.

<i>Additional information, details, and explanations found on the subsequent pages of this workforce plan summary.</i>	
<b>Workforce Metrics, Retirements, and Executive Team</b>	
<p><u><i>Key Observations and Highlights</i></u></p> 	1. Enter key highlights or notes

### **Step 3: Enter Critical Roles Definition**

To complete Step 3, enter a very brief 1-2 sentence definition of the agency critical roles or the process used to identify them in the yellow box in the definition section of the Workforce Metrics, Retirements, and Executive Team page.

Commonwealth Exit Survey*		Definitions
<b>0</b> Total Responses	<b>0%</b> Response Rate	<b>N/A</b> Net Promoter Score
*Only classified employees are invited to participate.		
<b>Total Employees</b>	Total Employees include the following classifications: .....	
<b>Hire Rate</b>	The Hire Rate is the total number of hires during the fiscal year divided by the total number of employees.	
<b>Internal Mobility Rate</b>	The Internal Mobility Rate is the total number of internal promotions and transfers divided by the total number of employees.	
<b>Voluntary Separation Rate</b>	The Voluntary Separation Rate is the total number of external transfers and voluntary separations divided by the total number of employees.	
<b>Critical Roles Definition and/or Identification Process</b>		

**1. Enter critical roles definition**

### (Optional Use): Custom Settings for the Summary

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 or colors of specific metrics for data callouts.

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.

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. 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		

Critical Roles by EEO Code	Assessed Critical
1	
0.9	
0.8	
0.7	
0.6	
0.5	
0.4	
0.3	
0.2	
0.1	
0	

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

**Total Executives are Appointed Positions**

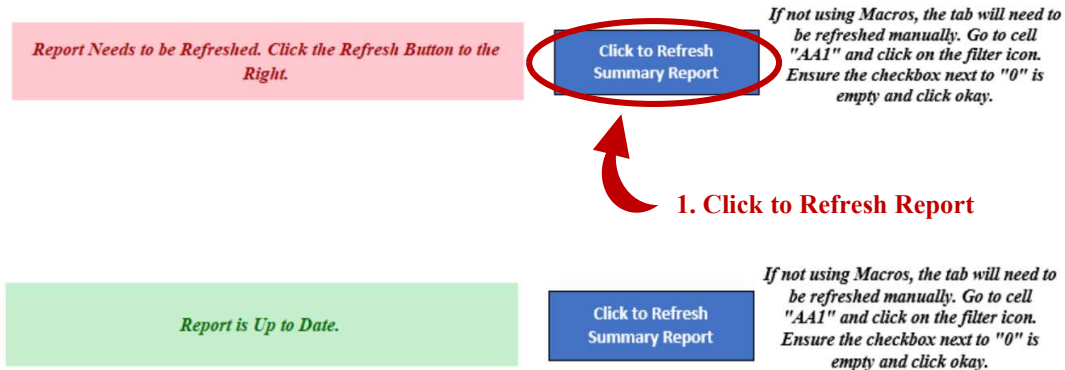
Sections of the Agency Strategy template that were optional can be omitted from the final summary by selecting "No" from the respective drop down in the optional column.

Optional Change: Include COV or Agency Exit Survey, Events, or Recognition Sections?	Retention & Engagement	Retention and Engagement focuses on understanding how employees move within or out of the agency, how long they serve
Include Exit Survey? Yes		
Include Agency Survey? Yes		
Include Engagement Events? Yes		
Include Employee Recognition? Yes		

**1. Change to "No" to exclude specific optional section.**

## **Step 2: Refresh Summary**

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”.

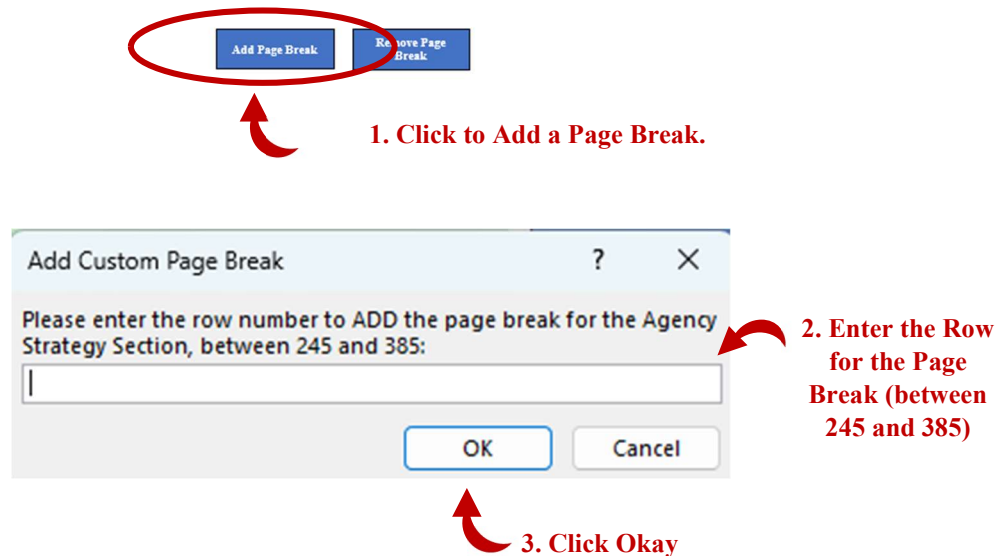


## **(Optional) Step 2(a): Add Custom Page Break for Agency Strategy Section**

In the event the Agency Strategy Section of the summary falls on multiple pages and the break between them is not in an ideal place, a custom page break can be added by clicking the “Add Page Break” button and then entering the row number where the break should take place.

### **(Optional) Step 2(a): Add a Custom Page Break for the Agency Strategy Section**

**INSTRUCTIONS:** If the agency strategy section is split on to multiple pages in the middle of an objective or action item, a custom page break can be added by clicking the "Add Page Break" button and entering the row number to insert the page break. It can also be removed by clicking the "Remove Page Break" button.

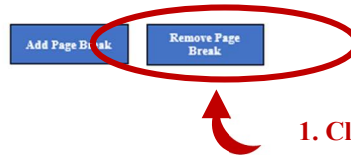


To remove the page break, click the blue “Remove Page Break” button.



***(Optional) Step 2(a): Add a Custom Page Break for the Agency Strategy Section***

**INSTRUCTIONS:** If the agency strategy section is split on to multiple pages in the middle of an objective or action item, a custom page break can be added by clicking the "Add Page Break" button and entering the row number to insert the page break. It can also be removed by clicking the "Remove Page Break" button.



**1. Click to Remove the Page Break.**

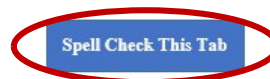
A new page break can be added by repeating the process. **Only 1 Page Break can be added at a time.**

**(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**



#### **Optional Step 4: Printing the Report to PDF (without Macros)**

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

### **(Optional) Appendix Tab**

The Appendix Tab houses all optional information entered on the In-Depth and Comprehensive tabs to be attached to the workforce plan summary. This is optional to use.

#### **Appendix Data Visibility**

Visibility of the sections on the Appendix are derived from the visibility selected on the In-Depth and Comprehensive Tabs. To change what fields show in the appendix, the selection on the In-Depth and Comprehensive Tabs will need to be updated.

#### **Custom Settings for the Appendix**

The Appendix allows for some settings to be customized for the agency, to include identified of changes from the prior year for certain metrics or colors of specific metrics for data callouts.

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 (similar to the workforce plan summary tab).

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. The metric and change indicator colors are separate from one another.

### **(Optional) Implementation Tab**

The Implementation tab is optional for agencies to use and can assist with tracking progress of strategy objectives or actions, assign ownership, and track progress.

#### **Create a Strategy Implementation Chart**

To create a strategy implementation chart, enter the required information for each action item included in the agency strategy in the yellow boxes beneath the action item. These include action item title, the owner, expected start and end dates. A specific color can be assigned as a way to track action items related to one another.

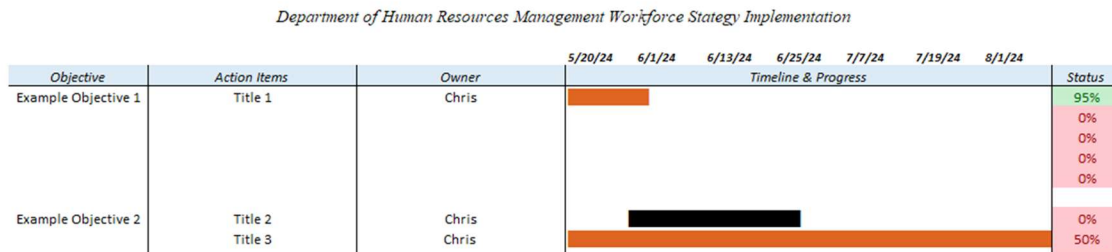
Overall Objective Statement

Action Item Description

Action Item Title:   
 Action Item Owner:   
 Expected Start Date:   
 Expected Completion Date:   
 Assign Color (optional):

1. Enter required information (yellow boxes)

After all information has been entered for each action item, the strategy implementation chart will be updated.



Progress updates and additional notes can be added throughout the fiscal year to ensure implementation is moving forward and to assist with the next year's workforce plan. Updates can be added by clicking the respective green button to add either a progress update or note.

**Objective 1 Progress Updates (Up to 20 Updates)**

Select Action Item:

Date of Update:

Milestone Completion Percent:

Update Details:

**Objective 1 Additional Notes (Up to 10)**

Note 1

Click to add progress update and enter information.

Click to add note and enter information.

## 5.0 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](mailto:dhrm.wfp@dhrm.virginia.gov) no later than September 30<sup>th</sup> 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](mailto:dhrm.wfp@dhrm.virginia.gov).

## 6.0 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.

### Strategic 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.