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

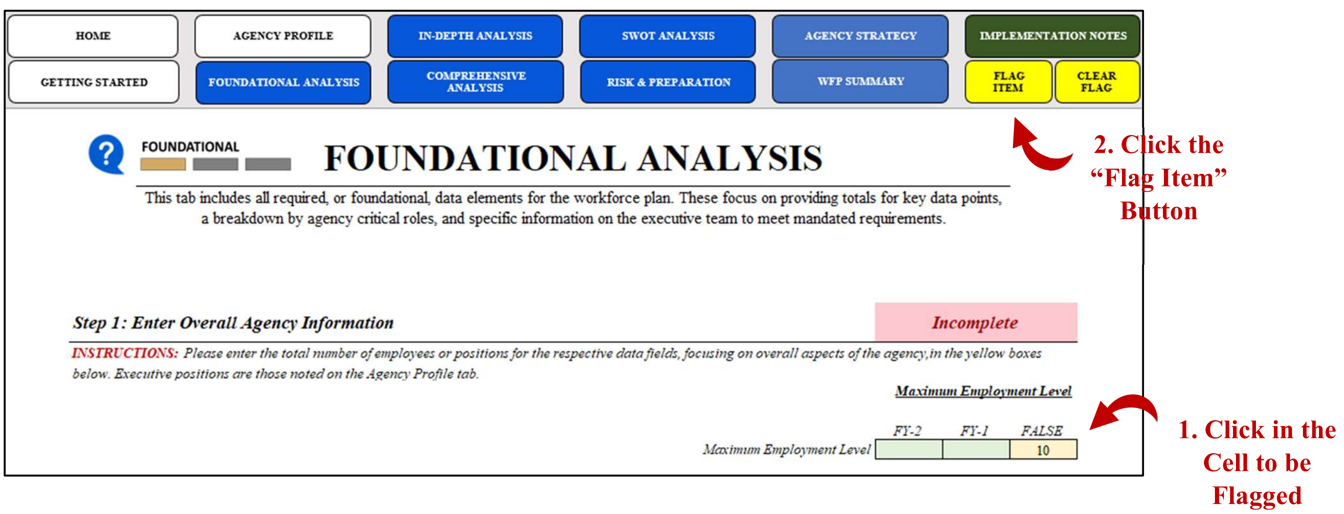
The Agency Strategy template is divided into several tabs that house similar information. It is recommended for users to progress through the tabs from left to right, beginning with the Home Tab.

Flag Feature

On the navigation bar at the top of each tab is the ability to "flag" and 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.

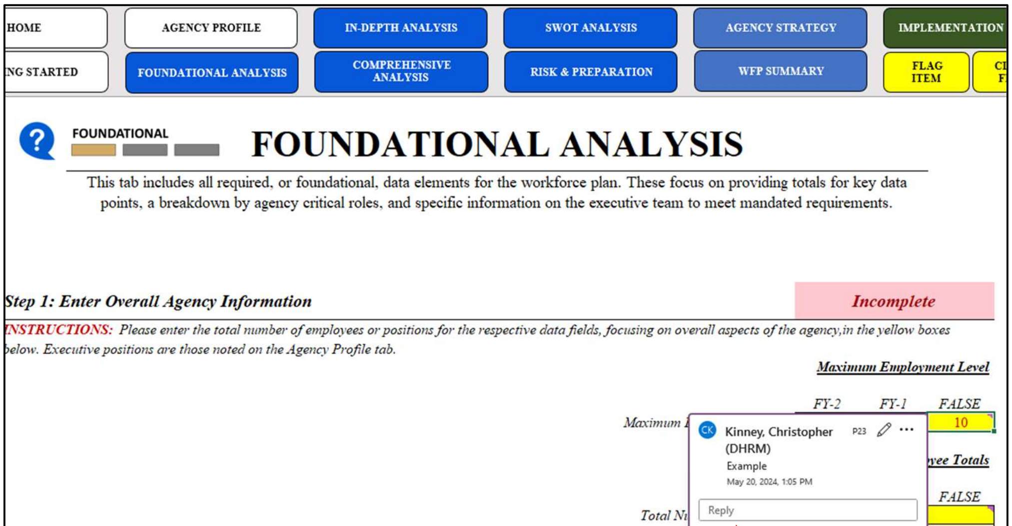
Add a Flag

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.



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.

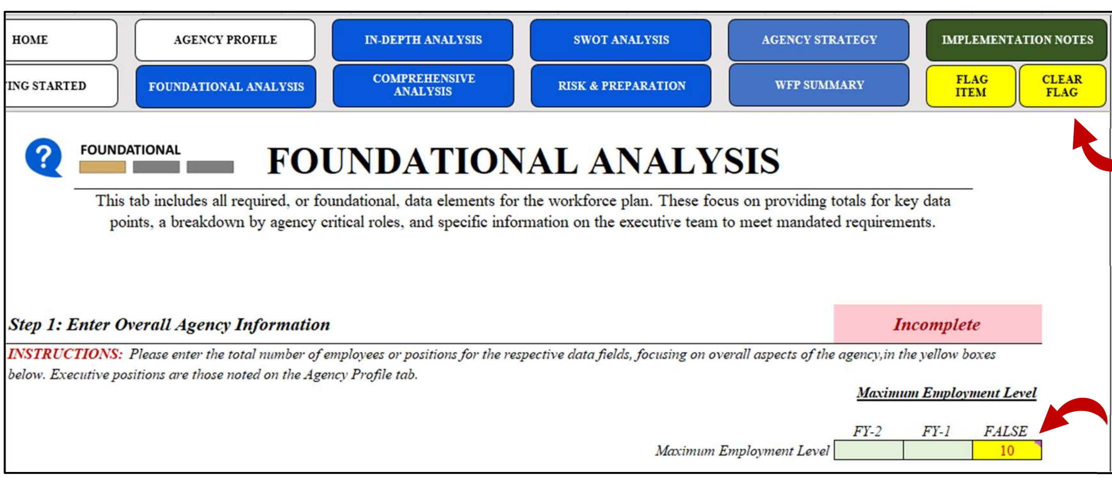
Once the item is flagged, it will appear yellow with red text. The reason entered will appear as a threaded comment when clicking on or hovering over the cell. You can continue to add notes to the comment by clicking the "reply" button or others can reply as well.



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.



2. Click the "Clear Flag" Button

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

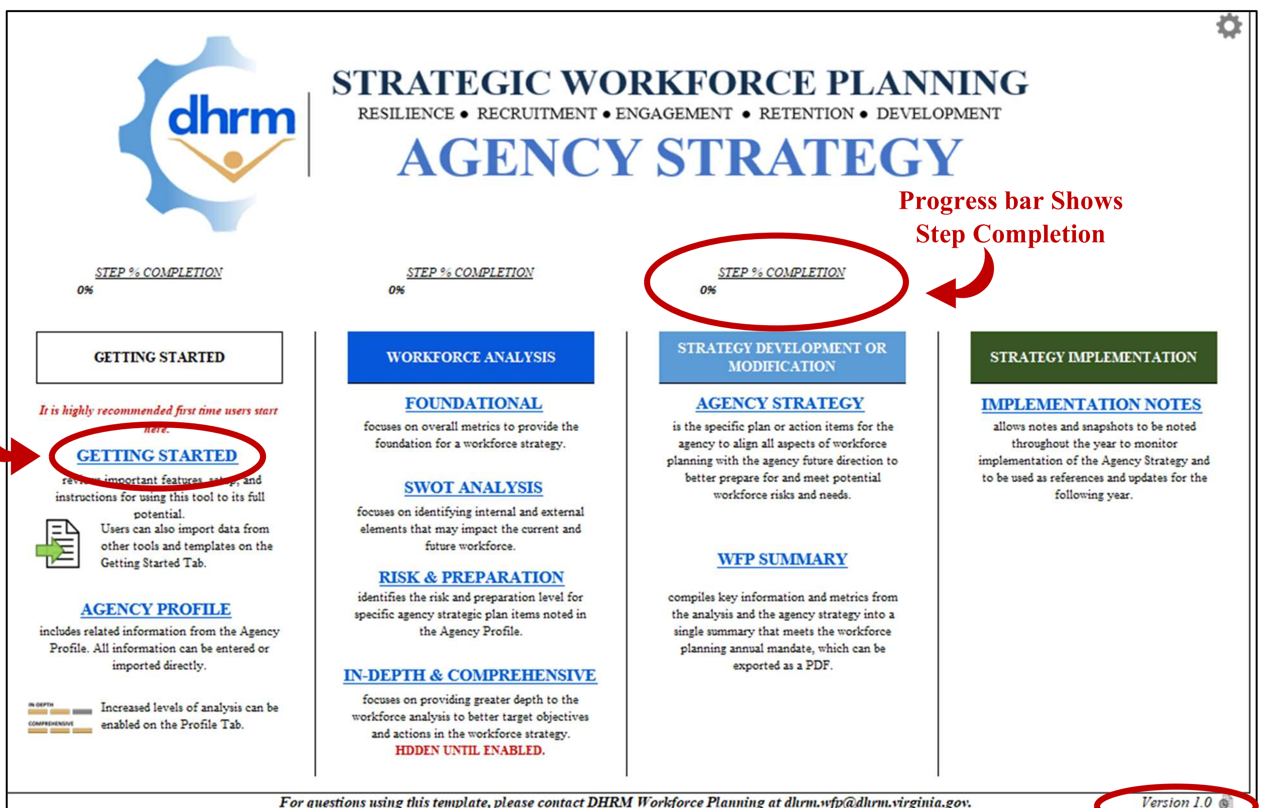
2. Click OK to clear flag and remove comments.

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

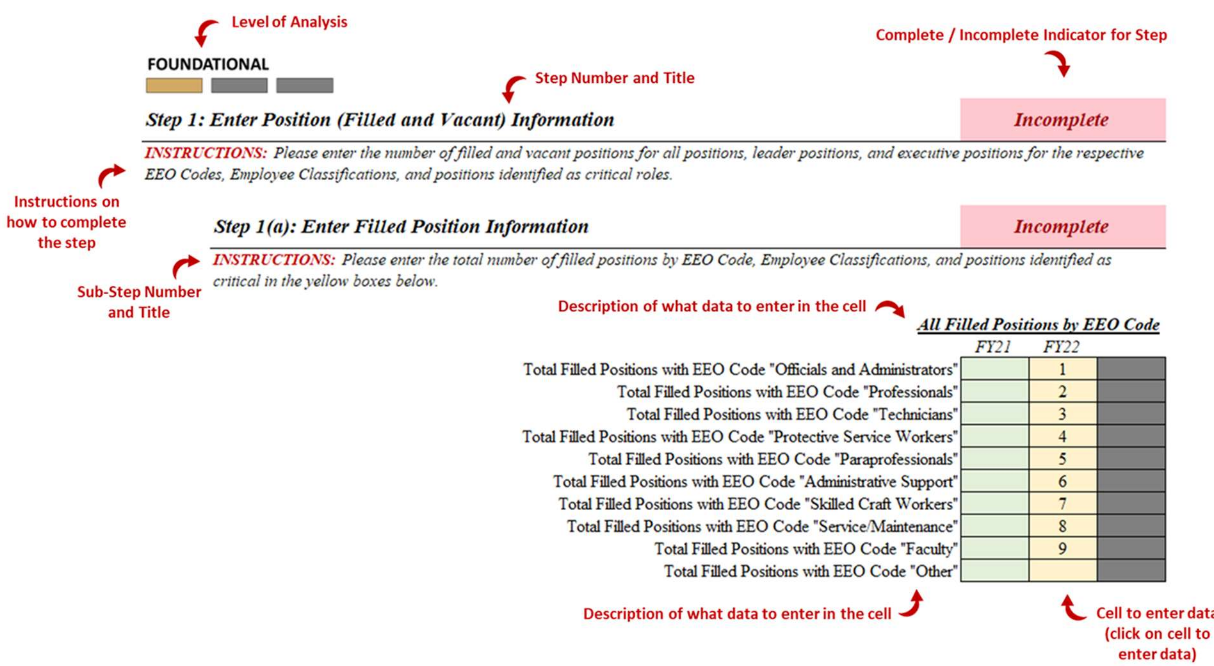
The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Agency Strategy template. Though it is not required to review, **it is highly recommended users spend time to review this information.**

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).

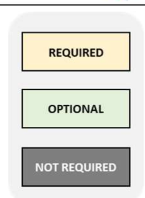
Cells with a yellow background indicate required information to be entered and cells with a green background are optional. Once all the required information is entered, the step indicator will change from **Incomplete** to **Complete**.

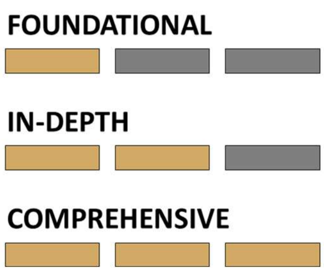


Some steps may include sub steps, indicated by the step number and letters slightly indented from the left.

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.

	**USE OF EXCEL MACROS** This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. **NOTE: Excel Macros must be enable to use them.** The template can also be used without the Macros, but will require some manual edits.
	**EASY FILE NAVIGATION** Each Excel Worksheet, or tab, houses related information which is compiled together into a single report. Links to each tab are frozen at the top of each tab to easily navigate between them.
	**COLOR CODED DATA ENTRY** Colors are used to identify what data should be entered and where. Yellow indicates required information. Green indicates optional information, and Gray indicates information is not required.
	**BUILT-IN HELP FEATURES** This template has a built in help feature. Click on the question mark in the blue circle to open a window with additional information, definitions, and steps to complete. **NOTE: Macros must be enabled. The template cannot be edited while help windows are open.**
COMPLETE **INCOMPLETE**	**PROGRESS INDICATORS** The home tab provides progress indicators for each step of the template. Each tab also provides progress indicators for each step or sub-step, which show if the step is complete or incomplete.
	**DATA IMPORT** This template is part of a suite of integrated workforce planning and development tools. Using these tools allows for information to easily be imported from one tool to the next. Data cannot be imported unless using a specific template, provided by DHRM upon request. **NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.**

	**EASILY REVIEW PRIOR INFORMATION** This template, if the prior year information as imported, has select areas of the template that allow for easy viewing of the prior year responses, noted by the magnifying glass icon in the blue call out bubble. **NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.**
	**TEMPLATE VERSIONS** As we continue to enhance this template, integrate it with other elements of workforce planning and development, or as changes to any mandates or guidance occurs, new versions of this template may be released. The version number is located on the Home tab in the bottom right corner. It is important to be using the most up to date version, which will be noted on the DHRM Workforce Planning Website. As new versions are released, the prior version data can be imported so no progress is lost.
	**INCREASING LEVELS OF ANALYSIS** 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. All foundational level elements are required and both the in-depth and comprehensive elements are highly encouraged, but optional.

(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

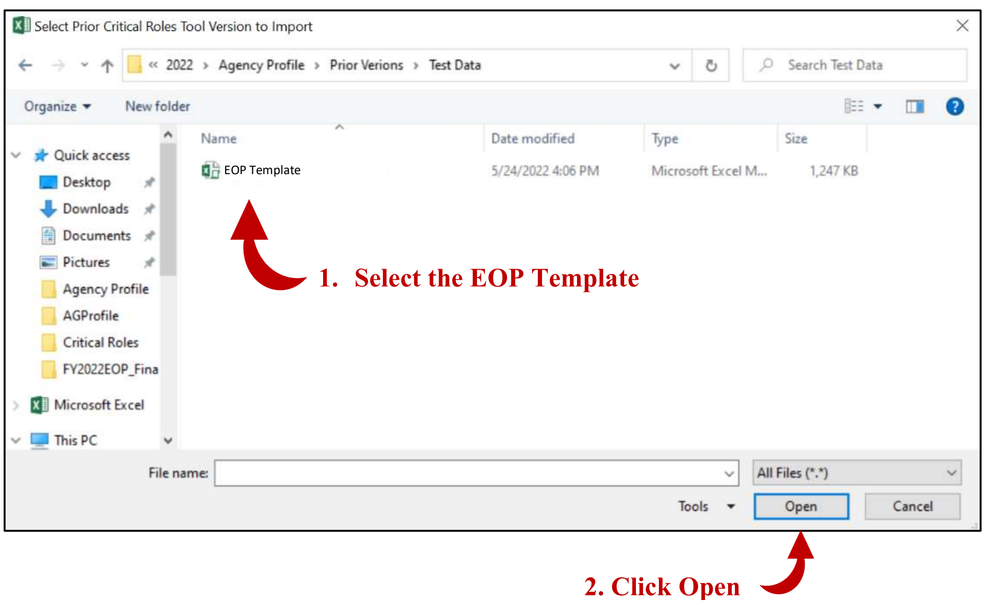
For efficiency and integration to other workforce planning and development tools, data from other sources can be imported. Imported data, shown in the table below, will automatically enter the information into the respective cells. Agencies are encouraged to still review the information for accuracy.

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..

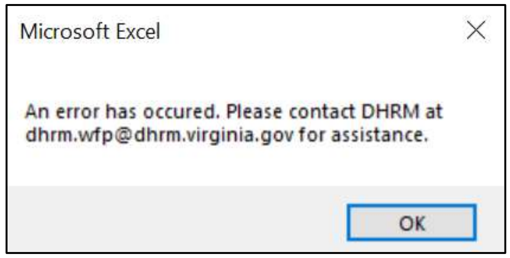
This will open the standard "Open File" dialog box. Simply locate and select the previous version Employment Opportunities template and click "Open". (Shown in the picture below).



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

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

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



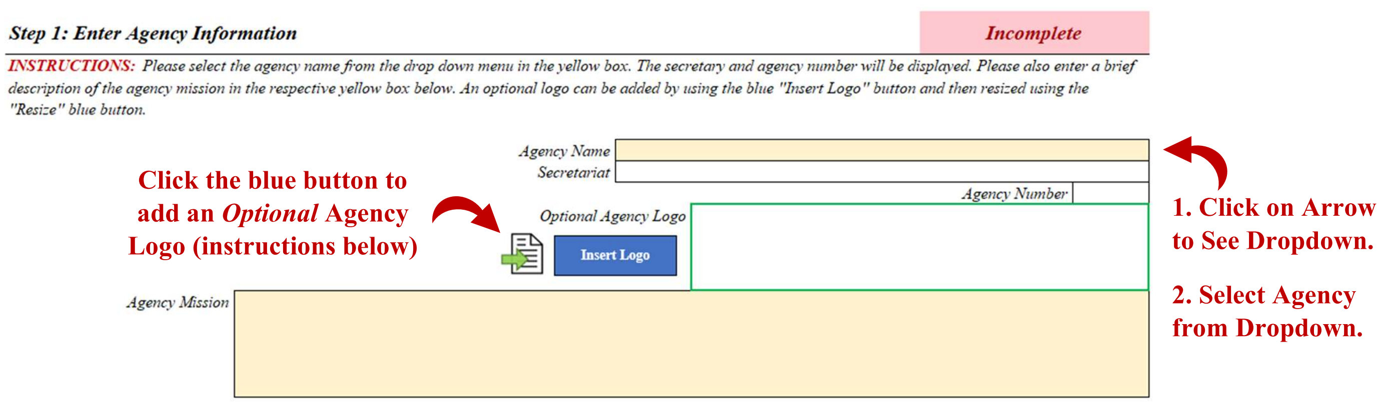
Agency Profile Tab

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

Step 1: Enter Agency Information

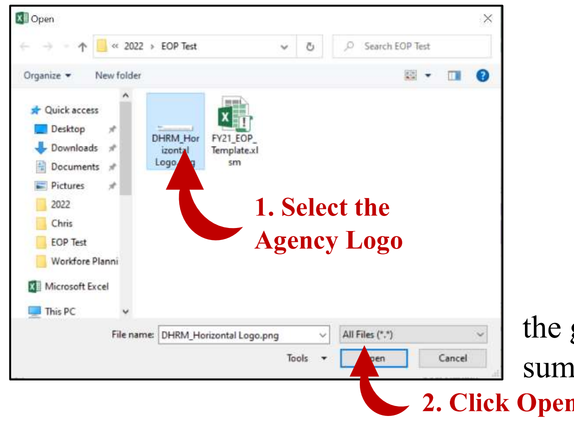
To complete step one, entering agency information, select the agency name from the drop down menu in the yellow box (shown in the picture below). To show the dropdown arrow, click in the yellow cell. The secretariat and agency number will be displayed automatically.

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.



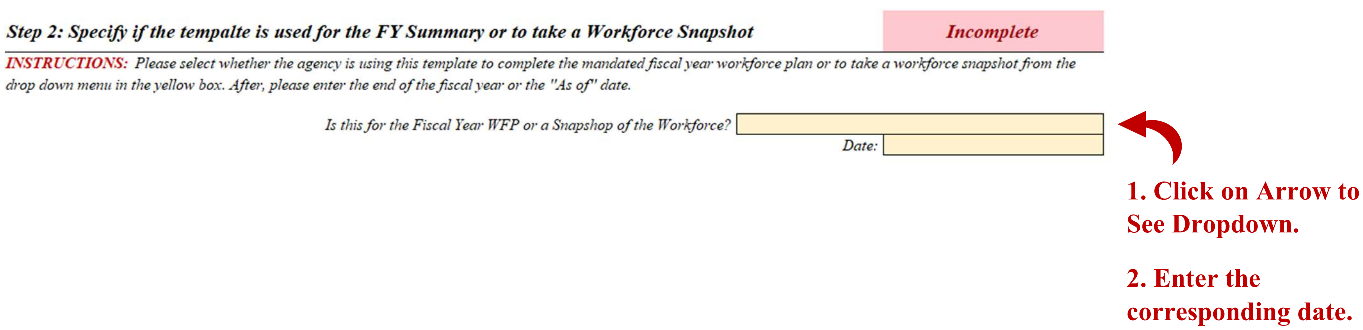
To add an ***optional*** Agency Logo, click on the purple button to open the standard "Open File" dialog box. Simply locate and select the Agency Logo and click the "Open" button. **NOTE: The Agency Logo must be a picture file.**

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



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.

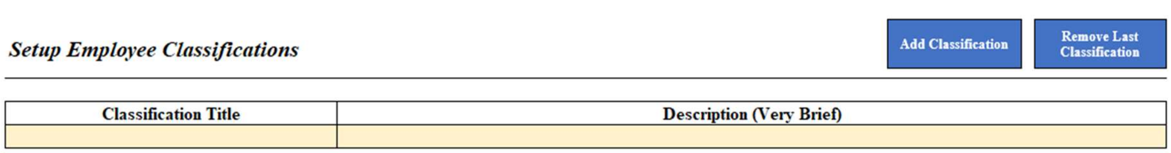


Step 3: Identify Classifications Included

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)**

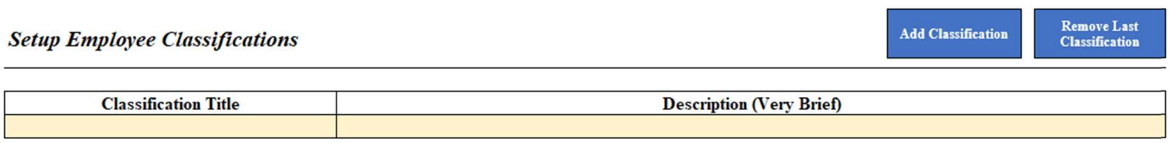


1. Click the "Add Employee Classification" button again to add up to 15 Classifications

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

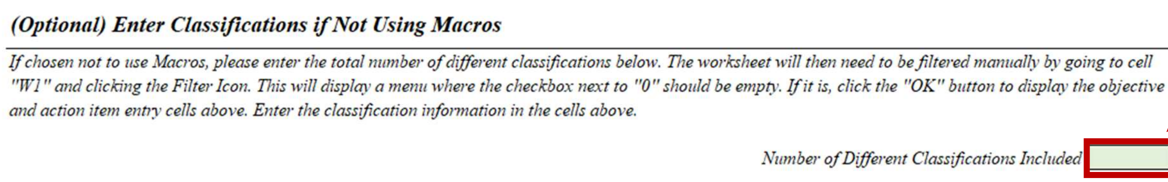


Click to Remove Last Added Classification

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

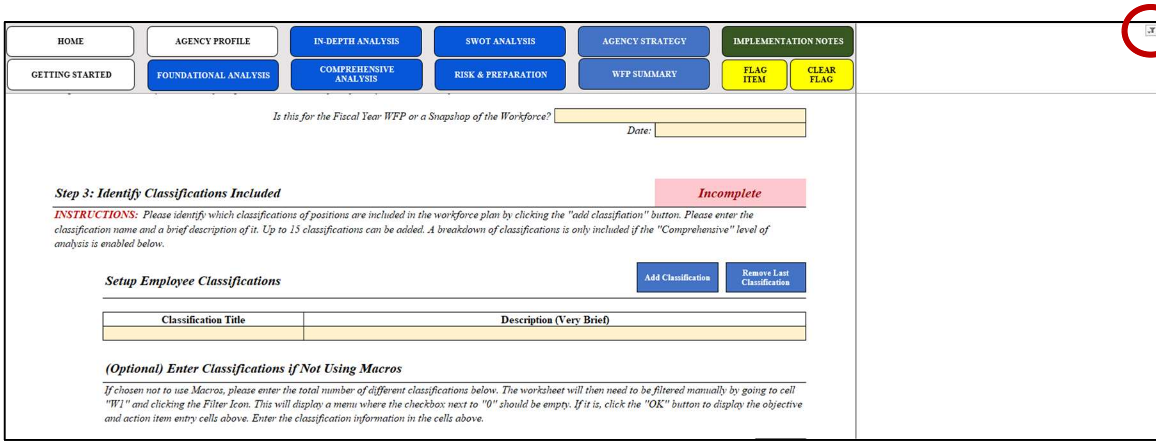
If the blue buttons were used to enter the Employee Classifications, this step can be skipped.

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.

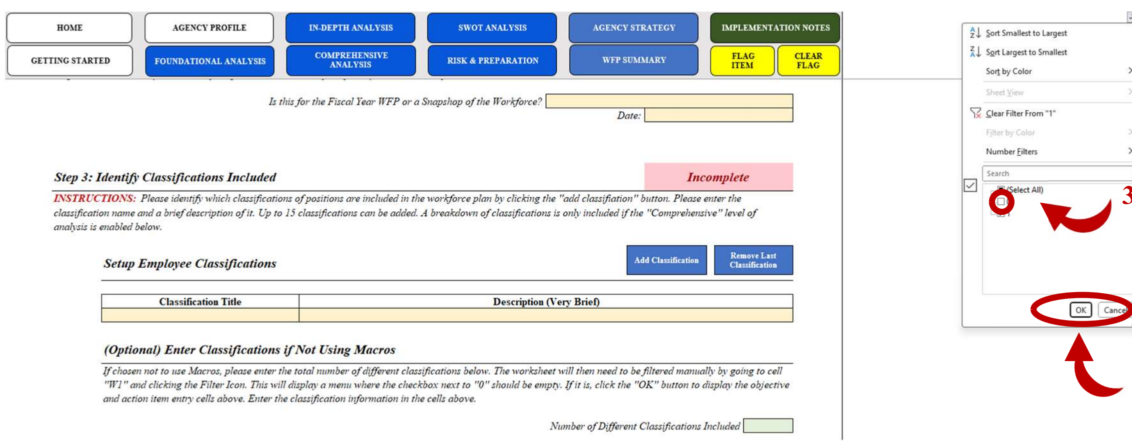


1. Enter the Total Number of Employee Classifications

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



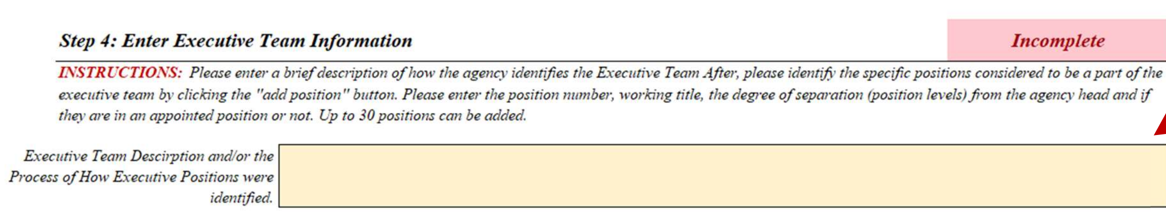
3. Verify "0" is unchecked

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.

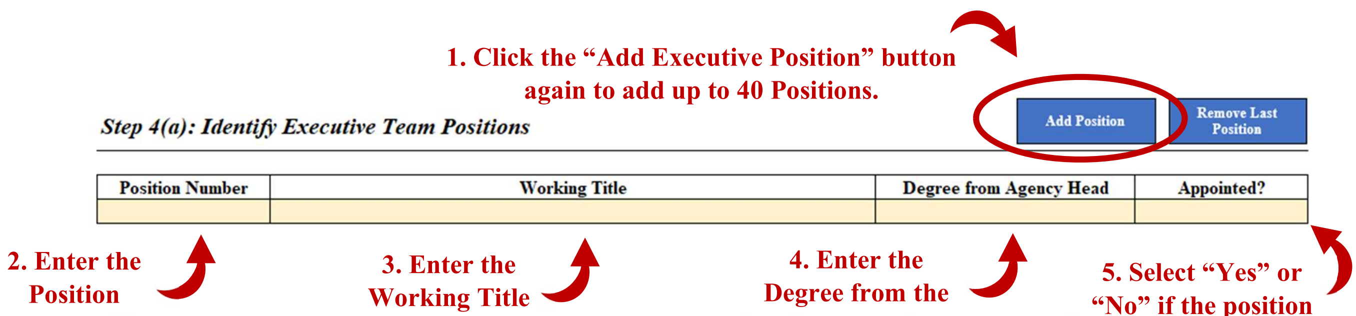
Step 4: Identify Agency Executive Team

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).

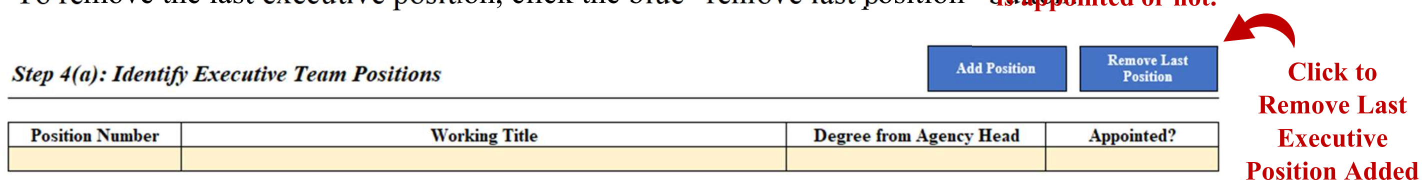


1. Enter Executive Team Description

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).**



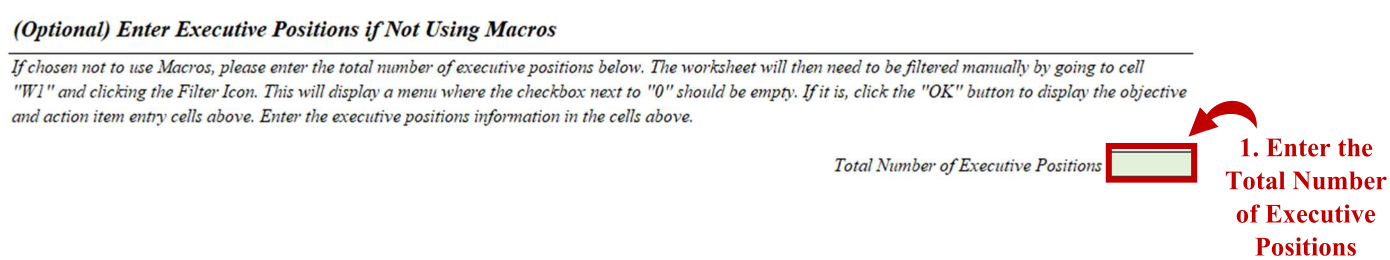
To remove the last executive position, click the blue "remove last position" button



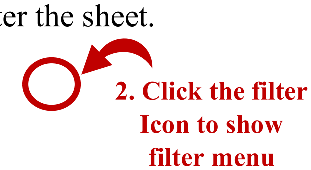
(Optional) Step 4(a): Enter Executive Team without Macros

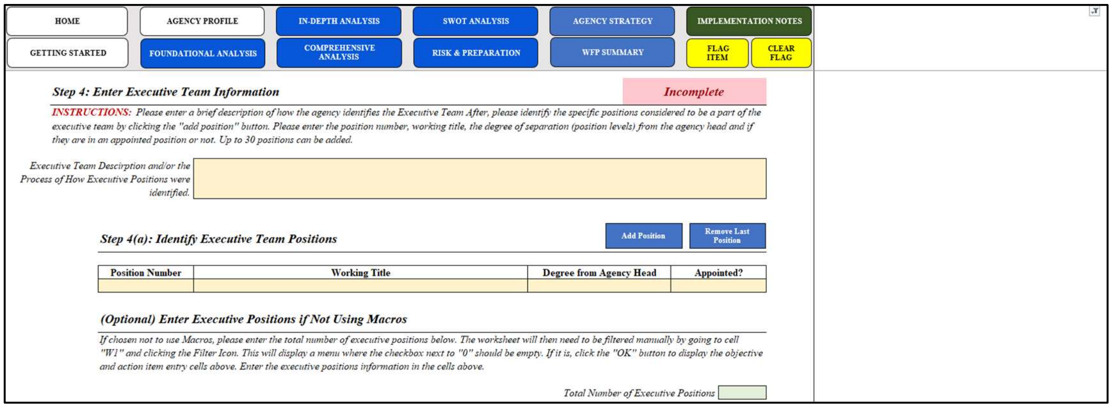
If the blue buttons were used to enter the Executive Team, this step can be skipped.

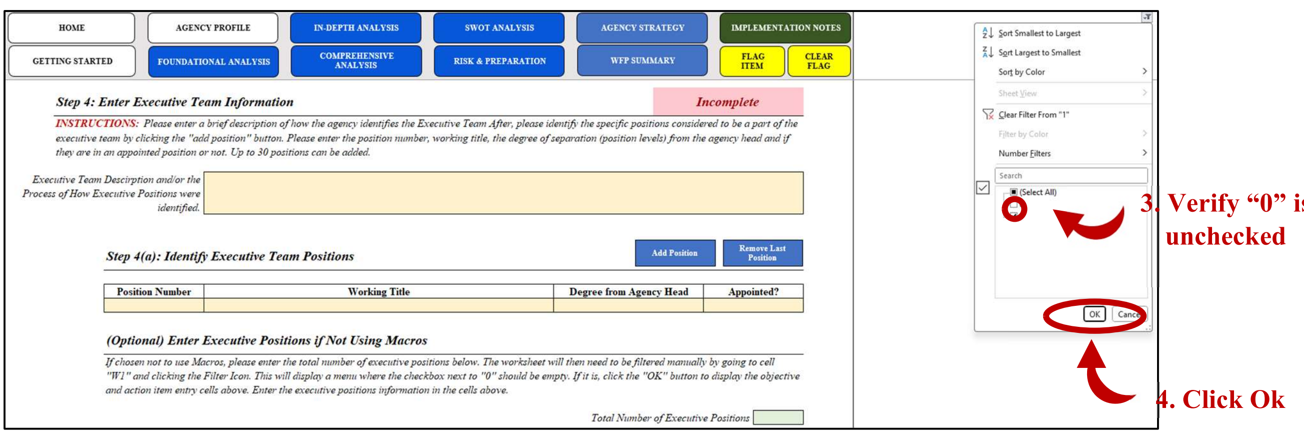
In the event Macros are not being used, the executive team positions can be entered by first entering the total number of positions in the green box.



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.







Step 5: Add Items from Agency Strategic Plans for Greater Alignment

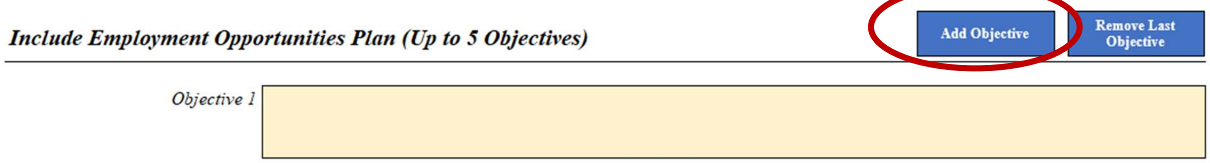
To complete step five, entering the objectives or action items from other strategic plans that may impact the agency workforce or be impacted by the workforce or its capabilities. Some recommended plans to research and potentially include elements from are the Employment Opportunities Plan, Salary Administration Plan, DOI Goals, or any other agency strategic plans.

To complete step five, at least one objective must be added from any plan.

To enter an objective, click the blue "add objective" button for the respective plan the objective is derived from. Though the format for this template and the agency plan may not match exactly, these are general statements to reference the specific plans actions or objectives and can be summaries.

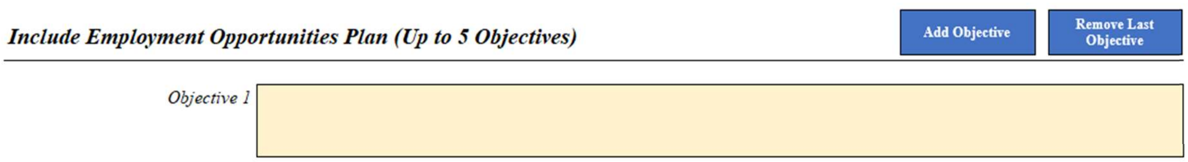
The instructions below reference the Employment Opportunities Plan but the same process is used for each of the plans included in the template.

1. Click the "Add Objective" button for the respective plan.



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

To remove the last objective, click the blue "remove last objective" button.



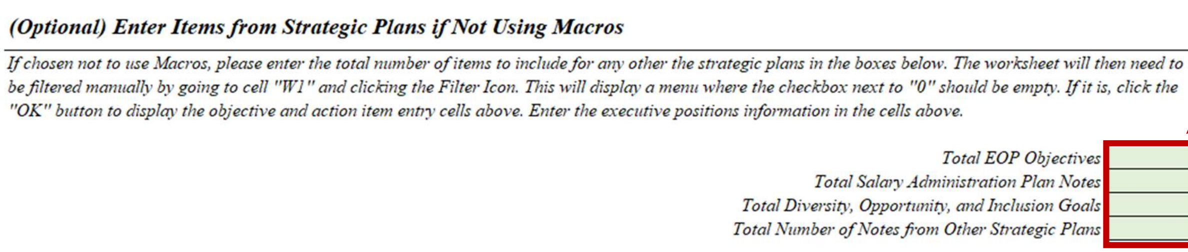
Click to Remove Last Executive Position Added

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

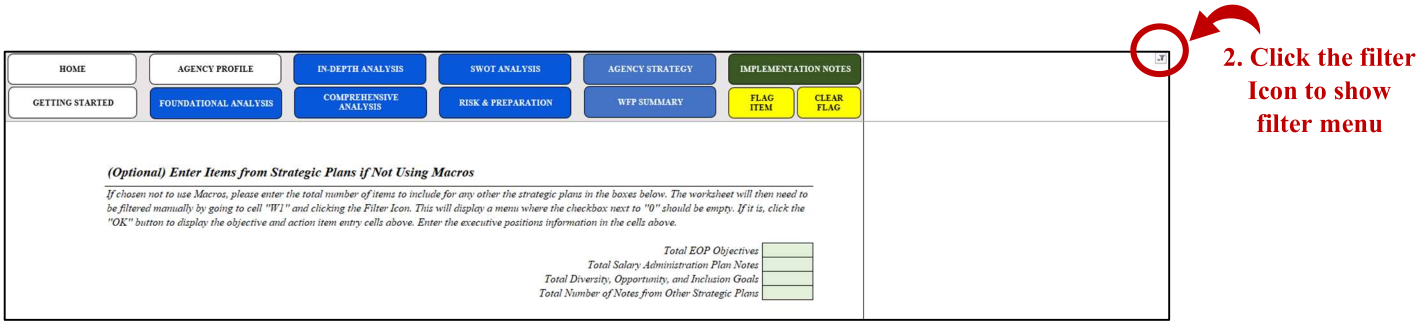
(Optional) Step 5(a): Enter Strategic Objectives if not using Macros

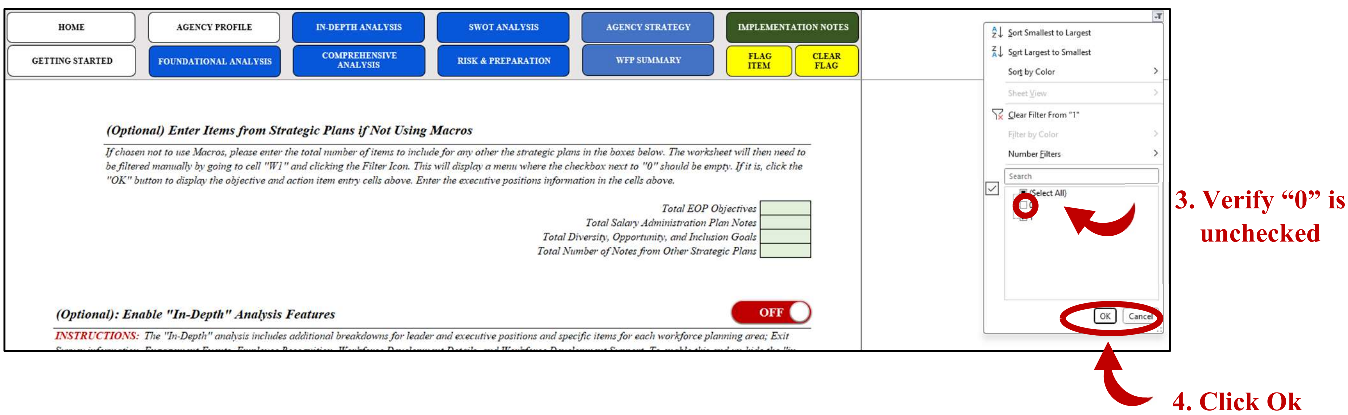
If the blue buttons were used to enter the Strategic Objectives, this step can be skipped.

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



1. Enter the Number of Strategic Objectives for the plans





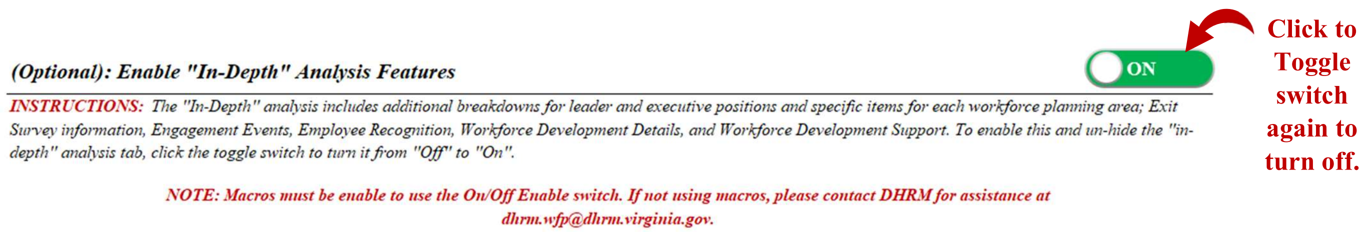
(Optional) Enable In-Depth and Comprehensive Analysis Tabs

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.

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.

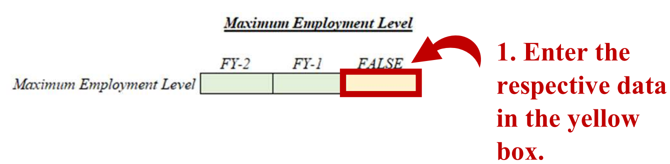
To enable the In-Depth Tab, click the toggle switch next to the respective step on the Profile tab. If not enabled, the toggle will be red and say "OFF". When enabled, the toggle will turn green and say "ON".



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.



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*

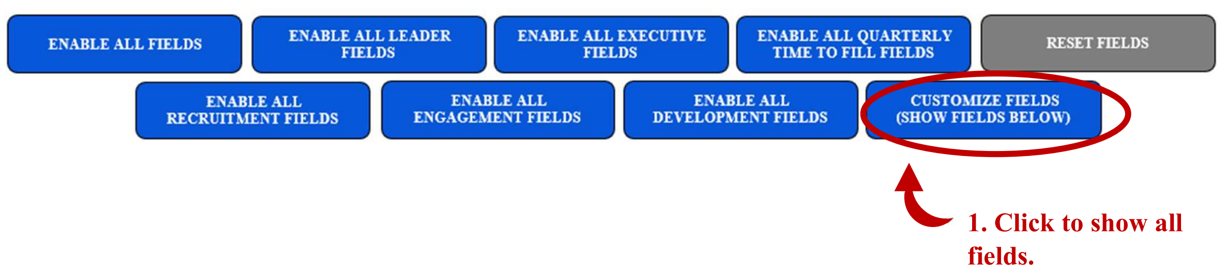
	both total and for critical roles
Retention & Engagement	Average Years of Service* Internal Promotions* Internal Transfers* External Transfers* Voluntary Separations* Exit Survey Information **for critical roles, first five years, and first year*
Workforce Development	Internships Participation in Internal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

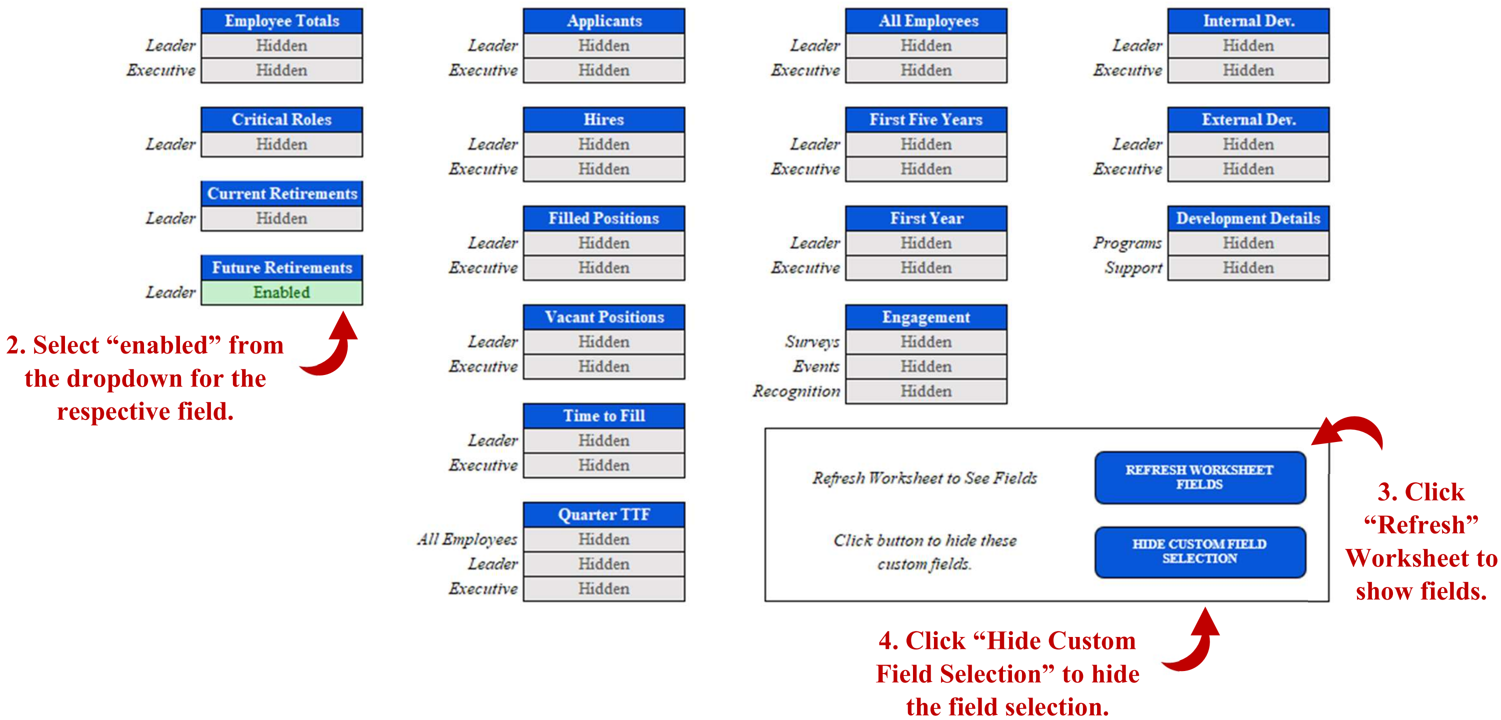
To complete the Foundational Tab, repeat the process of entering information into the yellow boxes for each set of data from the table above.\

In-Depth and Comprehensive Analysis Tabs

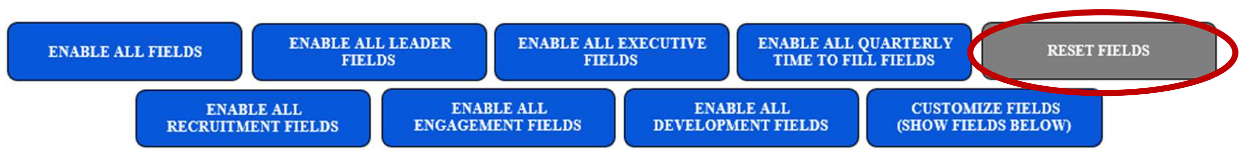
The In-Depth and Comprehensive analysis tabs use the same process as the Foundational tab with a few exceptions. First, the specific data fields are initially hidden from view until selected. The blue buttons at the start of the tab can enable specific sections of data entry, or, a custom selection can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

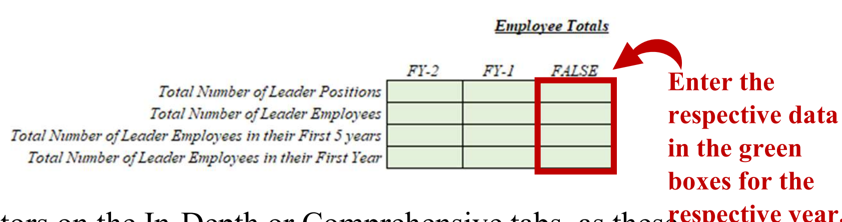




To reset the fields, click the gray "Reset Fields" button. This will make all fields "hidden" and hide their rows.



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.



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.

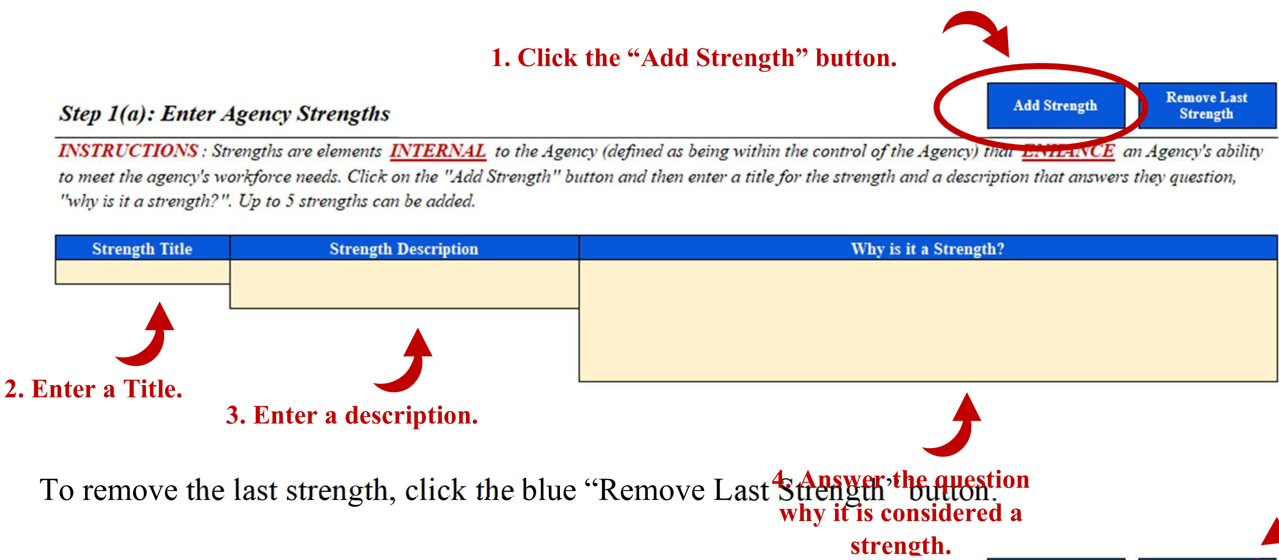
SWOT Analysis Tab

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.

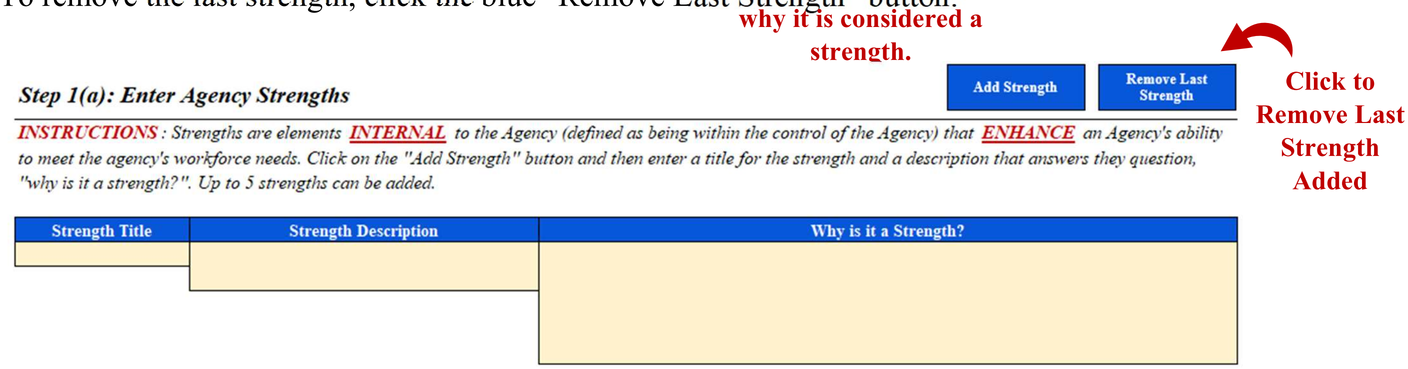
Step 1: Complete a SWOT Analysis

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 enters 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.



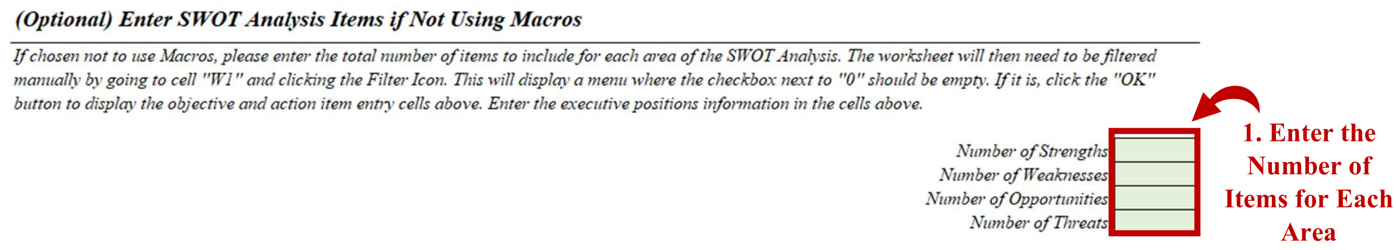
To remove the last strength, click the blue "Remove Last Strength" button.

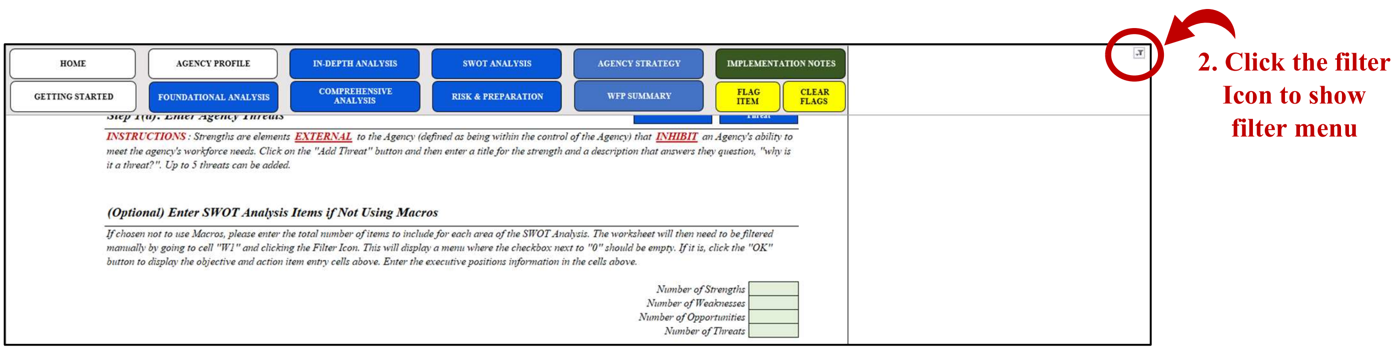


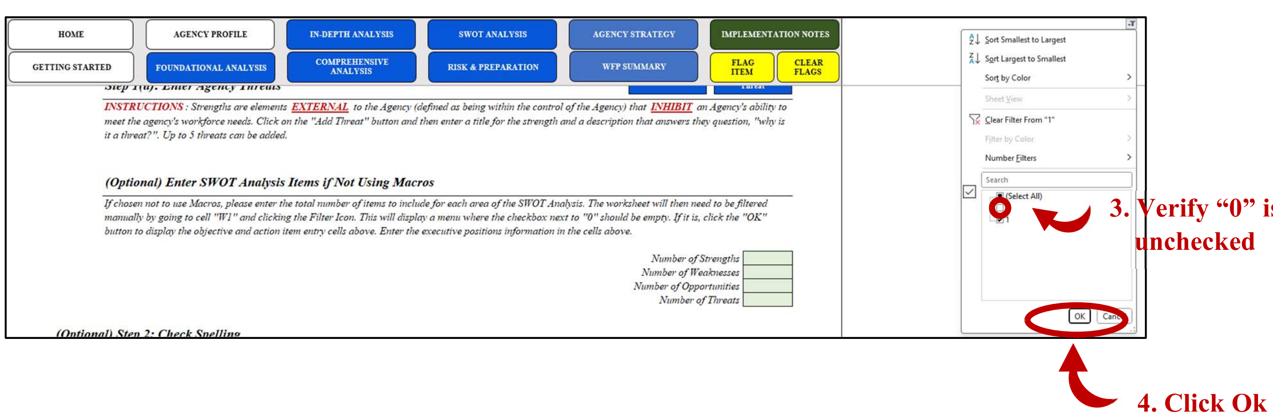
(Optional) Step 1(a): Enter SWOT Analysis if not using Macros

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.

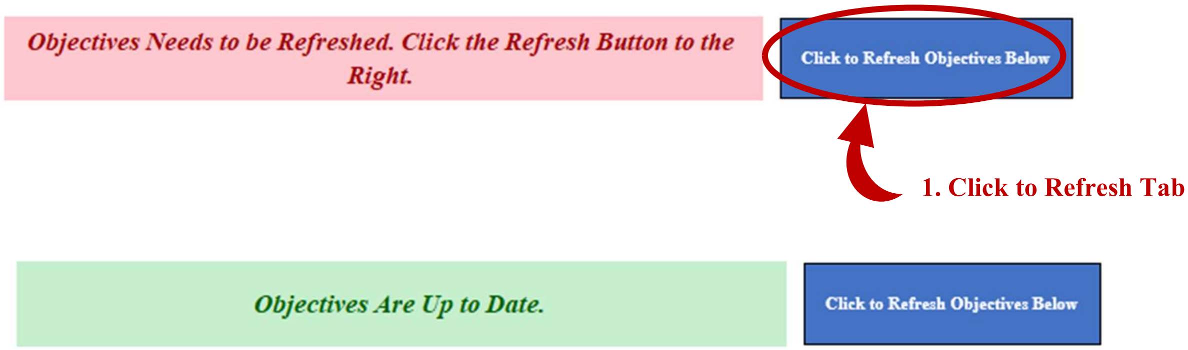






Risk and Preparedness Tab

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”.

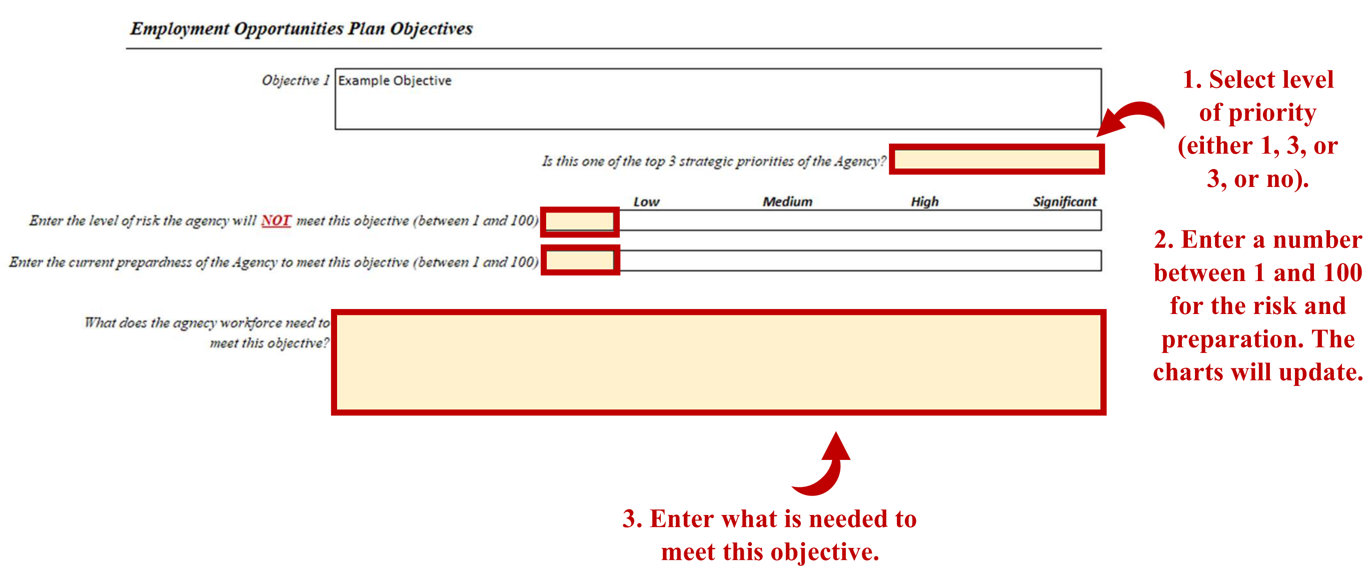


If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

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 it the same for each objective shown. To add or remove an objective, follow the instructions in the Profile Tab section.

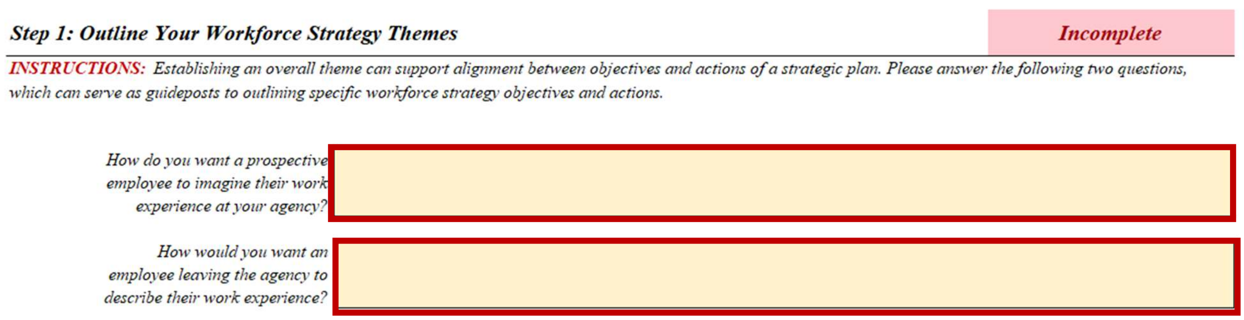


Agency Strategy Tab

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

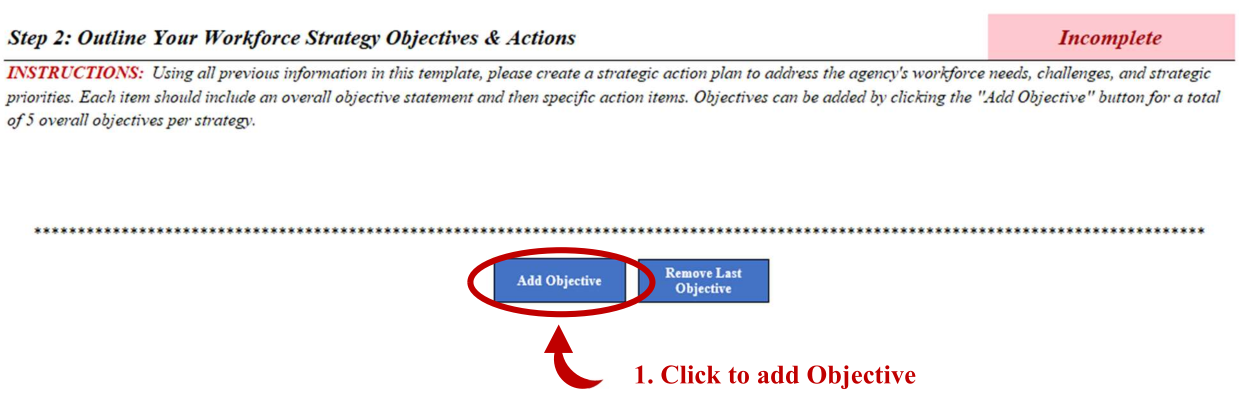
Step 1: Outline Your Workforce Strategy Themes

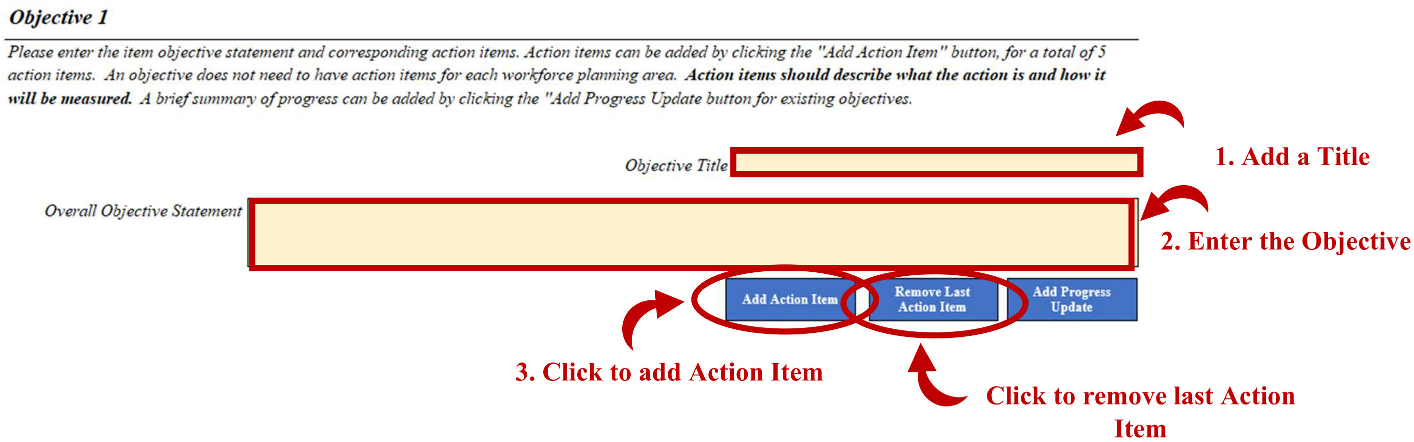
To complete Step 1, answer the two prompt questions of "How do you want a prospective employee to imagine their work experience at your agency?" and "How would you want an employee leaving the agency to describe their work experience?" in their respective yellow boxes (shown below).



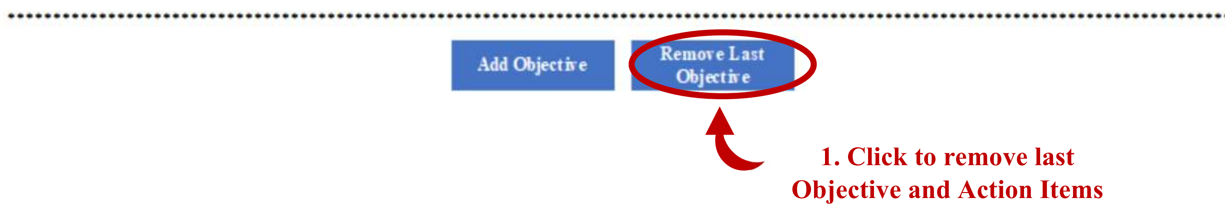
Step 2: Outline Your Workforce Strategy Objectives and Actions

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.

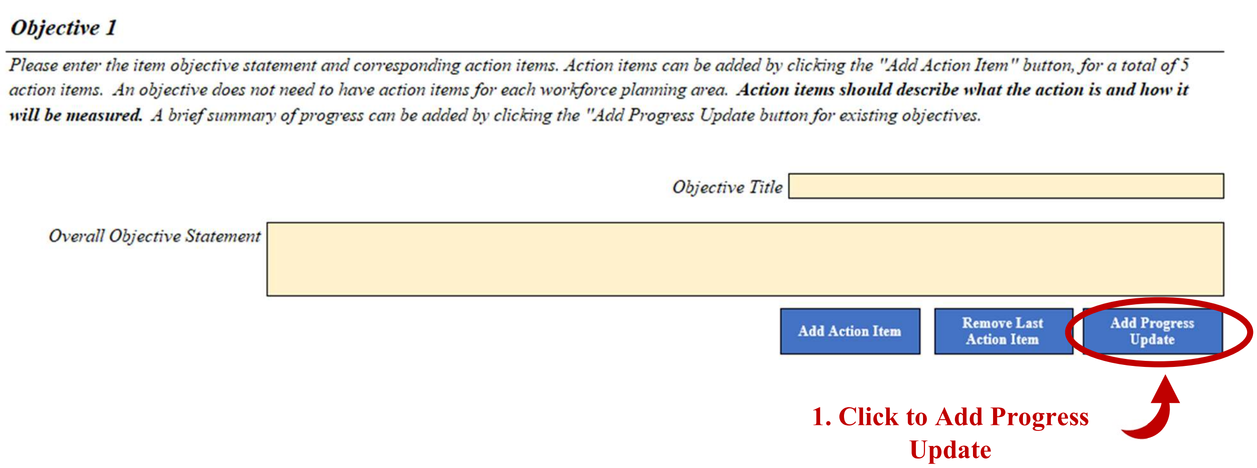




Repeat this process to add additional objectives and corresponding action items. An objective and all action items can be removed by clicking the "remove last objective" button (shown below).



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

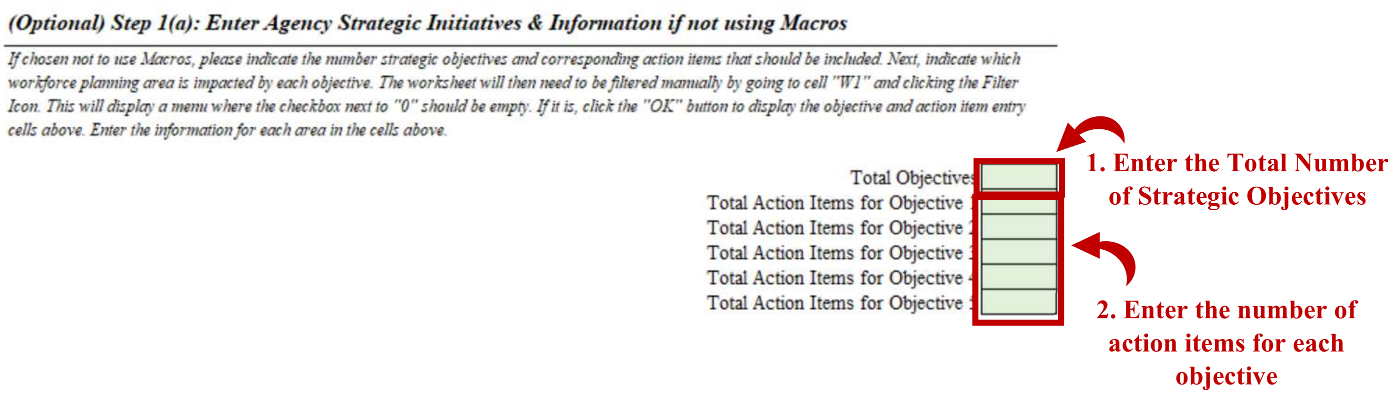


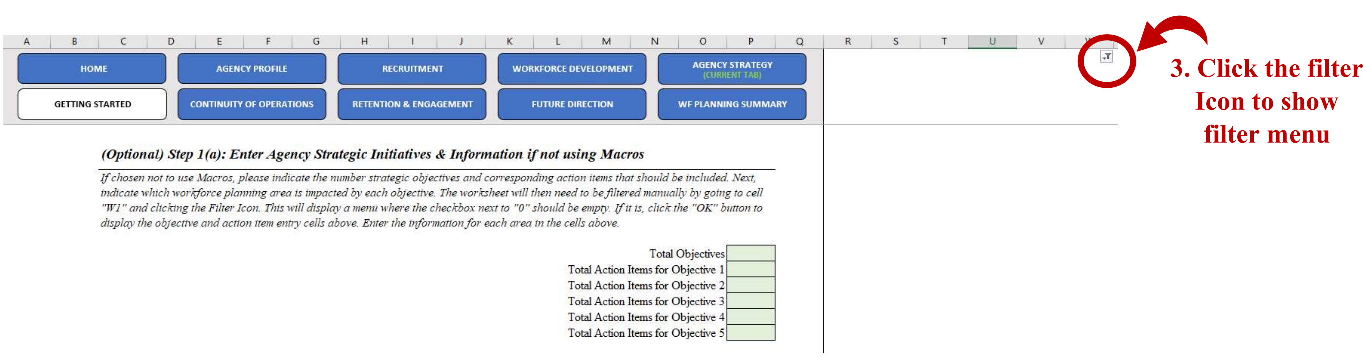
To view an update from the prior year, click on the "Show Prior Year Progress Update" Icon. To hide the prior year progress update, click the "Hide Prior Year Progress Update Icon".

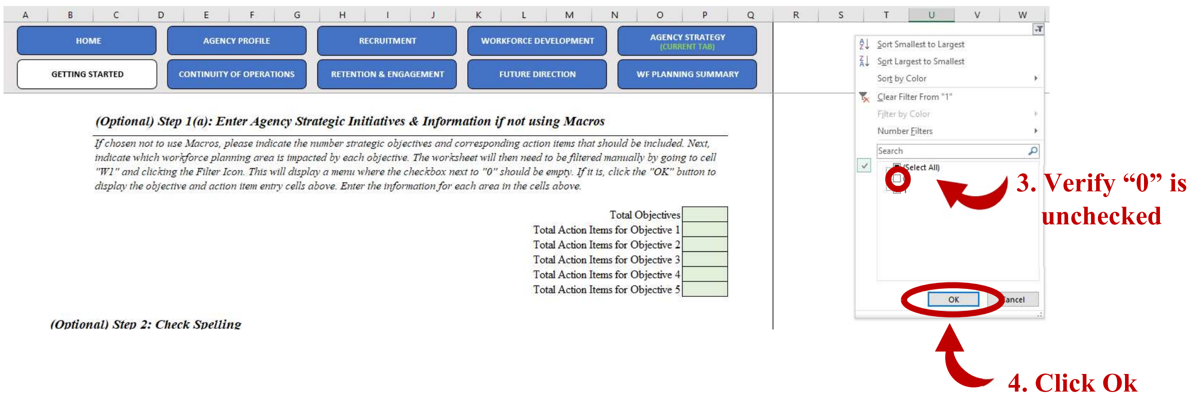
<u>(Optional) Step 2(a): Create Overall Workforce Strategy without using Macros</u>

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).







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.

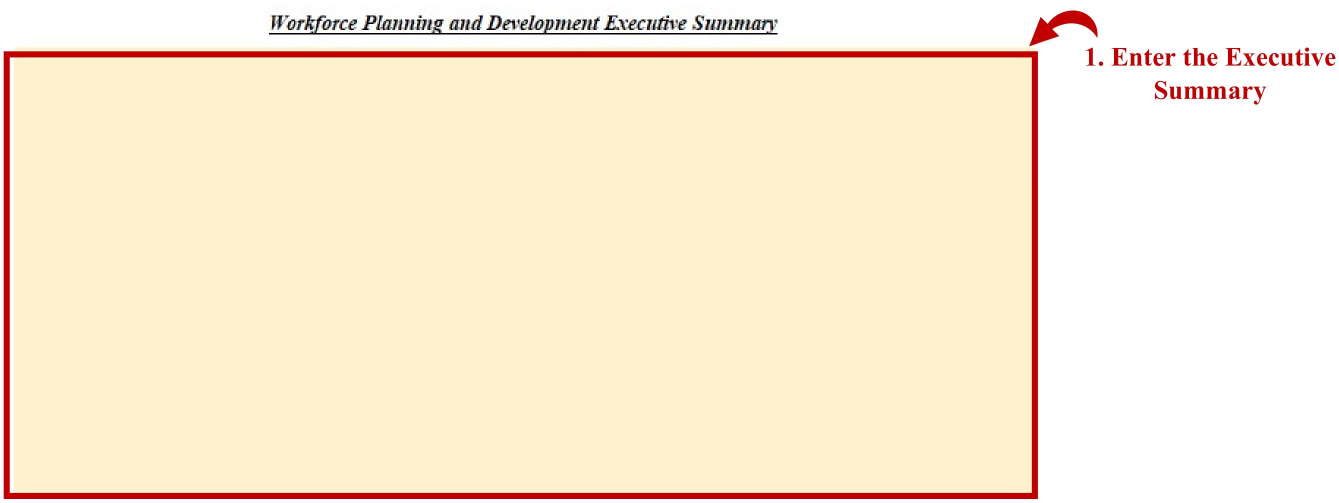
Workforce Planning Summary Tab

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".

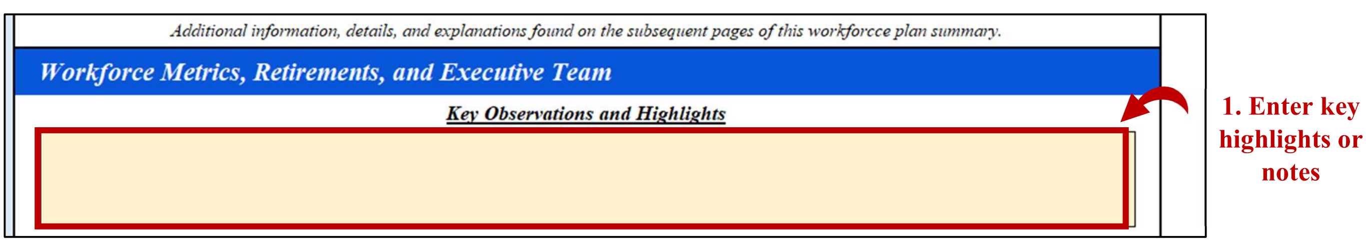
<u>Step 1: Enter Executive Report Summary</u>

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.



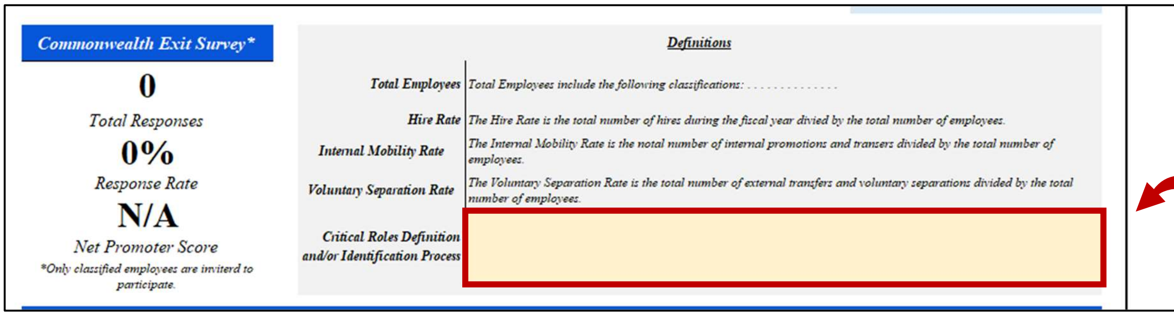
<u>Step 2: Enter Key Findings, Highlights, or Key Observations on the Metrics Page</u>

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.



<u>Step 3: Enter Critical Roles Definition</u>

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.



1. Enter critical roles definition

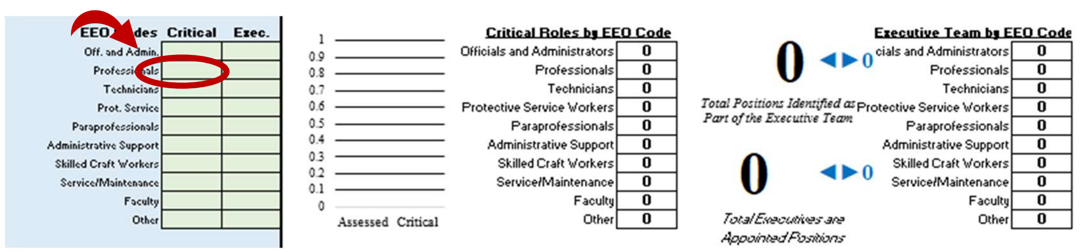
(Optional Use): Custom Settings for the Summary

The Workforce Planning Summary allows for some settings to be customized for the agency, to include identified 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.

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.

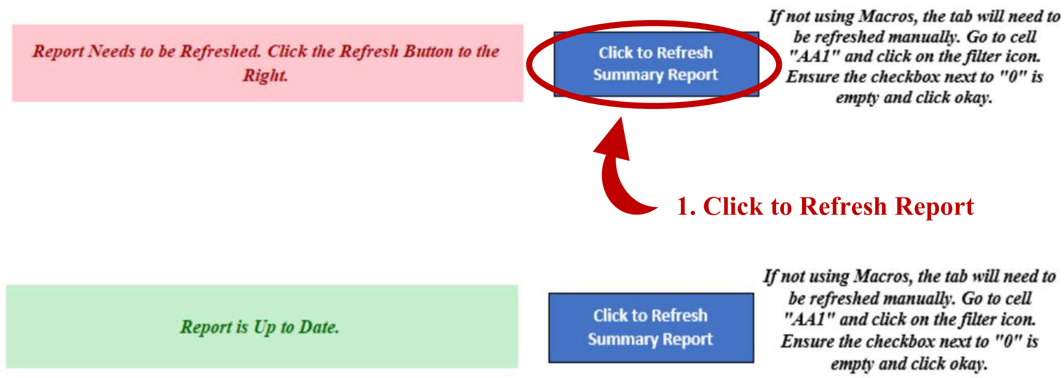


Sections of the Agency Strategy template that were optional can be omitted from the final summary by selecting “No” from the respective drop down in the optional column.

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

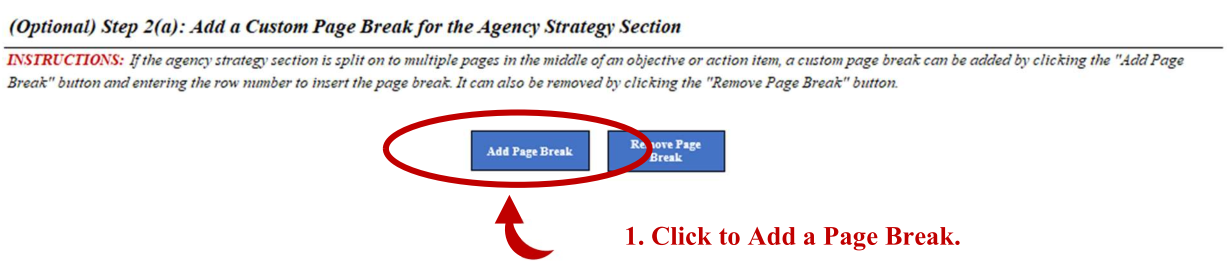
Step 2: Refresh Summary

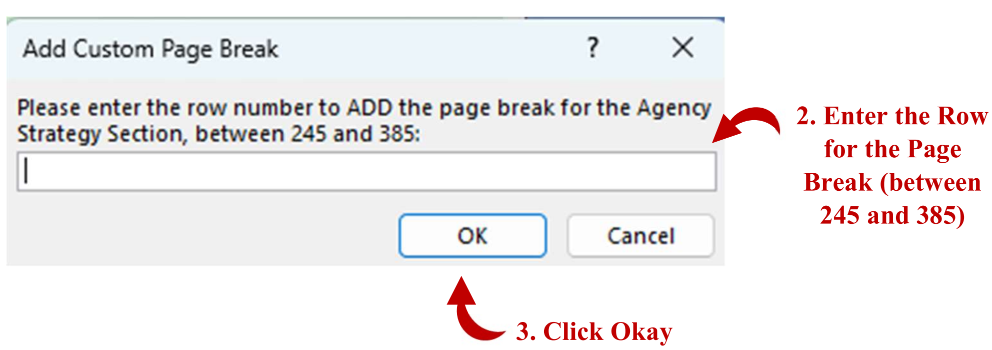
After all information has been entered or settings adjusted, the report may need to be refreshed. The report can be refreshed by clicking the blue "Click to Refresh Summary Report" if the indicator says "Report needs to be refreshed. Click the Refresh button to the right". After, the indicator will turn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



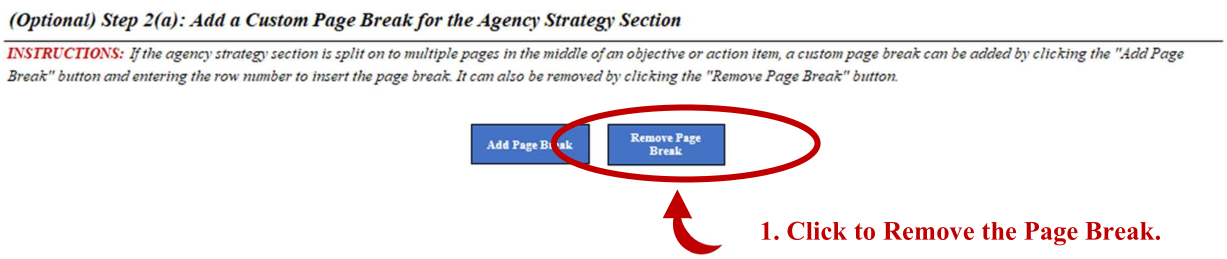
(Optional) Step 2(a): Add Custom Page Break for Agency Strategy Section

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.





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



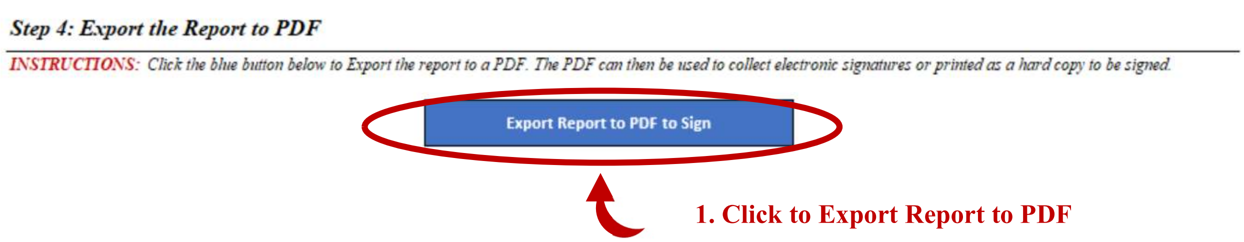
A new page break can be added by repeating the process. **<u>Only 1 Page Break can be added at a time.</u>**

<u>(Optional) Step 3: Check Spelling</u>

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.

<u>Step 4: Export Report to be Signed</u>

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



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).

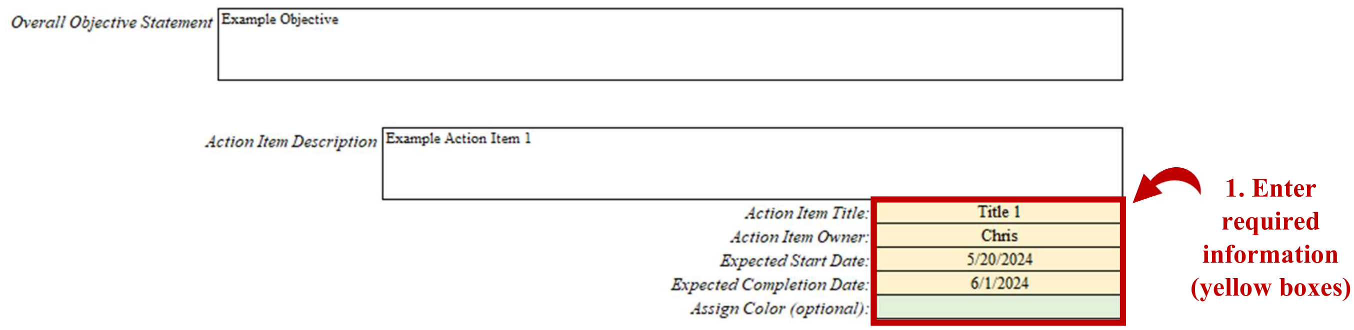
Colors for the key data metrics can be customized between green, yellow, red, or purple to highlight specific metrics. Colors for the metrics can be changed by selecting the color from the dropdown menu for the respective metric. The metric and change indicator colors are separate from one another.

(Optional) Implementation Tab

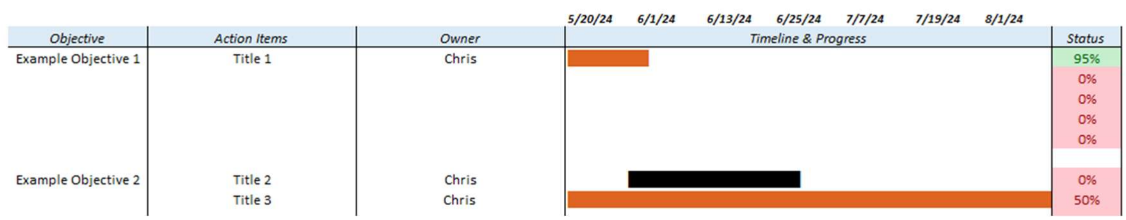
The Implementation tab is optional for agencies to use and can assist with tracking progress of strategy objectives or actions, assign ownership, and track progress.

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.



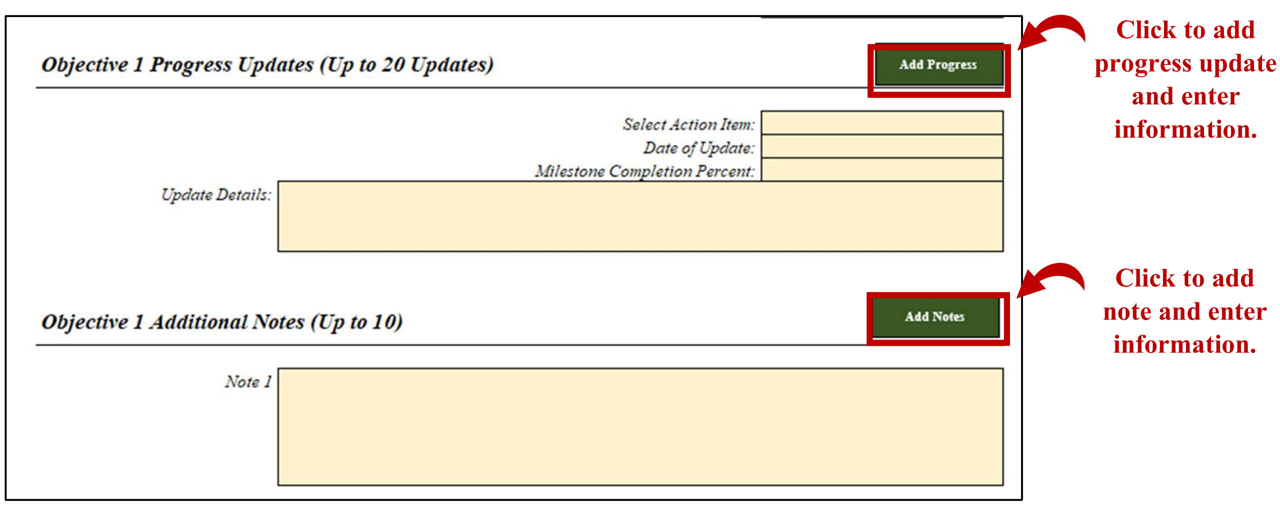
After all information has been entered for each action item, the strategy implementation chart will be updated.



Department of Human Resources Management Workforce Stategy Implementation

Objective	Action Items	Owner	Timeline & Progress (5/20/24, 6/1/24, 6/13/24, 6/25/24, 7/7/24, 7/19/24, 8/1/24)	Status
Example Objective 1	Title 1	Chris		95%
				0%
				0%
				0%
				0%
Example Objective 2	Title 2	Chris		0%
	Title 3	Chris		50%

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.



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 no later than September 30th of the reporting fiscal year.

Please include the Agency Name and the term "Workforce Plan Report" in the subject line.

For Questions or Additional Assistance

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

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.