

## Organizational Environment and Agency Priorities Worksheet

Consider these questions about the organizational environment and agency priorities as part of the assessment phase, informing the workforce planning process.

Area	Questions to Consider	Notes
<p><b>History</b></p>	<ul style="list-style-type: none"> <li>• What is the history of workforce planning in the organization?</li> <li>• What has been done already or tried before?</li> <li>• What can past experiences tell you about feasibility, innovation, and opportunities in the organization for workforce planning? What key lessons do you need to remember as you embark on planning?</li> <li>• Does the agency have elements of a workforce plan or workforce planning process, such as assessment data or a training plan?</li> </ul>	
<p><b>Governance</b></p>	<ul style="list-style-type: none"> <li>• Are there governmental or agency system mandates, requirements, or restrictions that would affect your workforce plan?</li> <li>• Where is there alignment between agency initiatives and governing entity initiatives?</li> <li>• What interdepartmental resources can you leverage in the workforce planning process?</li> <li>• What best practices can you gather from other similar agencies?</li> <li>• Are there training requirements for all state/local/tribal/agency employees?</li> </ul>	
<p><b>Policies</b></p>	<ul style="list-style-type: none"> <li>• What existing agency policies would impact workforce planning?</li> <li>• Does the agency have a tuition reimbursement policy?</li> <li>• Does the agency have a release time policy for professional development and training?</li> <li>• Are workforce-related policies consistent across the organization or do they apply only to specific job classifications?</li> </ul>	
<p><b>Labor Structure</b></p>	<ul style="list-style-type: none"> <li>• Is the workforce unionized in whole or in part?</li> <li>• What limitations exist in terms of what can or cannot be done for segments of the workforce?</li> <li>• Does the agency have a union representative who should be included in the workforce planning process?</li> <li>• Do labor organizations offer unique benefits to their members that could support your workforce development efforts?</li> </ul>	

Area (Continued)	Questions to Consider (Continued)	Notes (Continued)
<b>Merit Systems</b>	<ul style="list-style-type: none"> <li>• Is the agency bound by merit systems and how does that influence the workforce planning efforts?</li> <li>• Does the agency have defined pathways for career advancement?</li> </ul>	
<b>Programmatic and Budgeting Considerations</b>	<ul style="list-style-type: none"> <li>• Are there governmental or agency budget restrictions that limit dollars or time devoted to training or travel?</li> <li>• Does the agency budget have funds to support staff training and professional development activities?</li> <li>• How might funding be leveraged through grants to support agency training efforts?</li> </ul>	
<b>Employee Performance</b>	<ul style="list-style-type: none"> <li>• How does the employee performance review process impact the expectations for professional development and the agency's culture? Is the process strengths-based or punitive?</li> <li>• Is the development of leaders supported at all levels of the organization?</li> <li>• Is innovation and health equity work supported and incentivized?</li> </ul>	
<b>Agency Priorities</b>	<ul style="list-style-type: none"> <li>• What implications do the mission, vision, and core values of the agency have on the workforce planning process?</li> </ul>	