

» Step 1 WORKSHEET

Identify Need: Organizational Assessment




Assign team members the responsibility of locating and gathering relevant information that will inform your responses to the questions. The information may be found in multiple sources that are described in the Step 1 Worksheet. Download the Step 1 worksheet and record and save your responses. You are encouraged to individually reflect on the questions, and then come together as a team to compare and contrast your responses. Reflecting upon the answers helps you and your team members think about the current and future direction of your agency and its workforce.

STOP ⚡ Download, save, and work in your saved worksheet!

Consider the following questions and gather existing information. Save relevant documents and/or record your responses to the questions below.

Your Agency's Current and Future Direction:

1. Review the mission and  **vision statement** of your agency. If one is not available consider the question: "why does your agency exist?"

 **LEARN MORE** about *Leading Change with Vision* and see **sample vision statements**.

2. What are the core values of your agency? These may be reflected in the agency mission and vision statement or in your Practice Model Statement or elsewhere. If these have not already been articulated, consider the following question: "What beliefs about your agency, staff, and clients drive your agency's behavior and performance?"

4. Consider the agency's program plans for the future. Again, review the information collected and reflected in the agency's strategic plan, or other documents that describe anticipated program changes.
5. What, if any, program or mission changes do you see on the horizon?

 **LEARN MORE** with a short video about Leading Change with Vision.

Summing It Up

Based on the information assembled and reviewed, what does the information tell you about your agency and its overall mission and direction? Dig deeper to consider the questions below and summarize your responses in a few paragraphs.

1. What information is most useful to you?
2. What does it tell you about your agency?
3. What else do you need to know? For example, what are the critical gaps in information; what information is not available or missing? How will you obtain missing information and how you will best move forward in the interim?

Now, consider your responses. On a scale of 1 = less important/significant to 5 = more important/significant, how important or significant is this information for your own agency's workforce planning?

Importance/Significance of Step 1 Information:

(less important/
significant)

1

2

3

4

(more important/
significant)

5

Keep In Mind:

Before you develop your Action Plan, your team will return to this information and your rating and consider how it influences the selection of strategies and development of your Action Plan.