

» Step 2 WORKSHEET

Gather Data: Environmental Assessment



Assign team members the responsibility of locating and gathering the relevant information that will inform your responses to the questions. The information may be found in multiple sources. Download the Step 2 worksheet and record and save the information and your responses. You are encouraged to consider the questions as individuals, and then come together as a team to compare and contrast your responses. Reflecting upon the answers provides you and your team members with critical information about your agency's strengths, weaknesses, opportunities and threats, and internal and external factors impacting the workforce.

Locate and check off the information as it is assembled. Download and save this worksheet, along with the information that your team collects.

Reports or survey results regarding agency culture and climate.

Job satisfaction survey results.


HR exit interviews.

Current funding and anticipated increases or decreases in reimbursable funding.

Budget trends and patterns; budget philosophy, or goals.

Legislative changes and departmental/agency initiatives.

Legal and statutory changes (consider upcoming elections and potential impact).

Changes in policy, rules or other mandates as a result of **consent decrees or litigation**. 

State/county/community demographic forecast (consider characteristics such as age, race, ethnicity, gender; immigration and retirements patterns, etc.)

Where can your team find demographic information? Places to look:

Your State or Agency's Human Resources Data and Reports

Your State's Department of Labor and Employment

National Labor Force Statistics—Demographics 

Bureau of Labor Statistics: Occupational Handbook 

U.S. Census Bureau 

Consider the Following Questions:

1. Are there specific social trends and changes or issues impacting your community, such as health, mental health, or substance use concerns?
2. What economic and education conditions impact the labor pool of a qualified workforce and/or impact your agency and community?
3. Are there technological or industry changes or generational shifts that facilitate or create challenges for your agency in the community?

Summing It Up

Based on the information that your team has assembled and reviewed, what does the information tell you about your agency and the internal and external factors impacting the workforce? 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 2 Information:

(less important/
significant)

(more important/
significant)

1

2

3

4

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.