

Cornerstones for Kids

Workforce Planning Tool Kit: Supply/Demand Analysis and Gap Analysis

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Submitted by:



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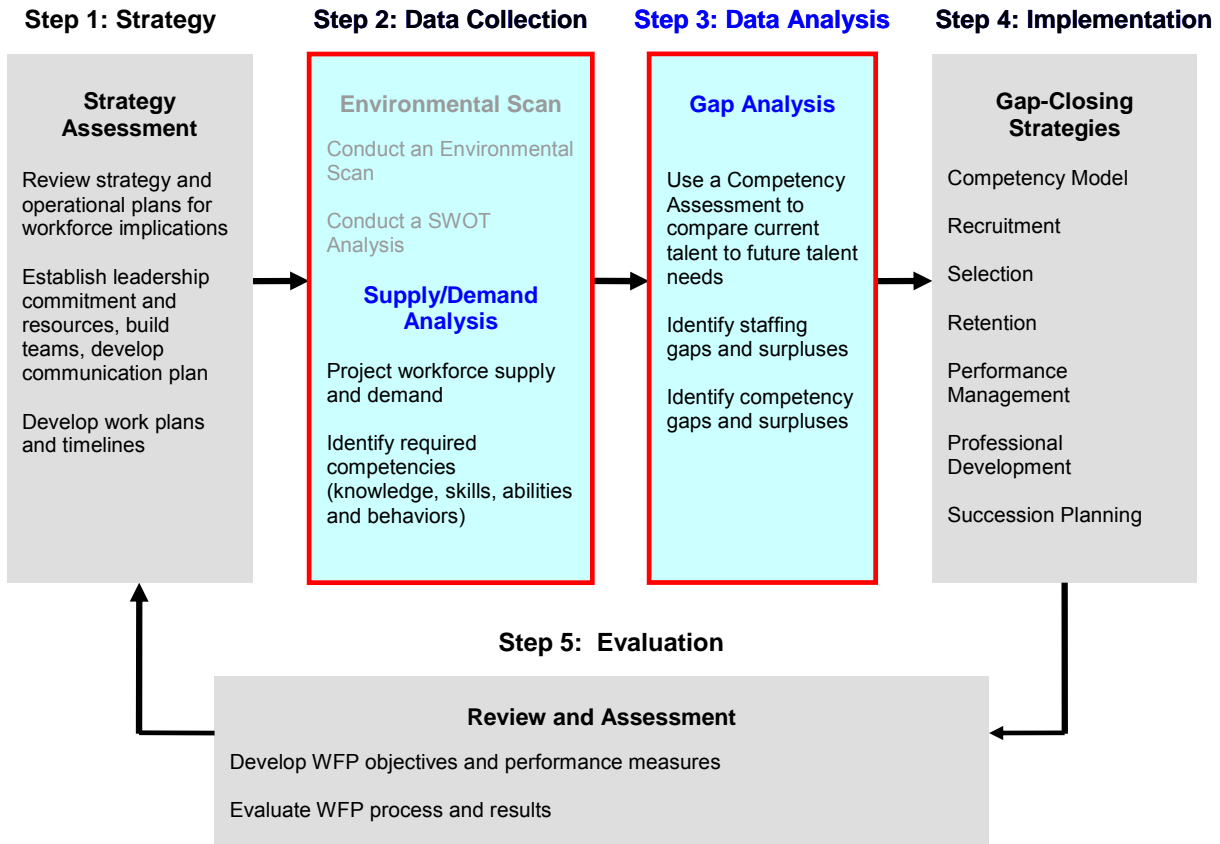
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Supply/Demand Analysis and Gap Analysis – Overview

Figure 1: Workforce Planning Steps



We designed this Tool Kit for public-sector and non-profit human services administrators and human resources professionals who want to take a comprehensive approach to addressing workforce issues. The information and guides in this Tool Kit can be used whether you employ an all public-sector and non-profit workforce, a contracted-out service delivery workforce, or a combination of private and public workforce. Similarly, this Tool Kit and the principles of the Workforce Planning model will work in agencies of all sizes – although you may have to modify slightly some of the concepts in a smaller organization.

This Tool Kit will help you analyze:

1. Your current and future staffing needs – Demand Analysis.
2. The staffing resources available to you – Supply Analysis.
3. Any gaps between the two – Gap Analysis.

What's in the *Supply/Demand Analysis and Gap Analysis Tool Kit*?

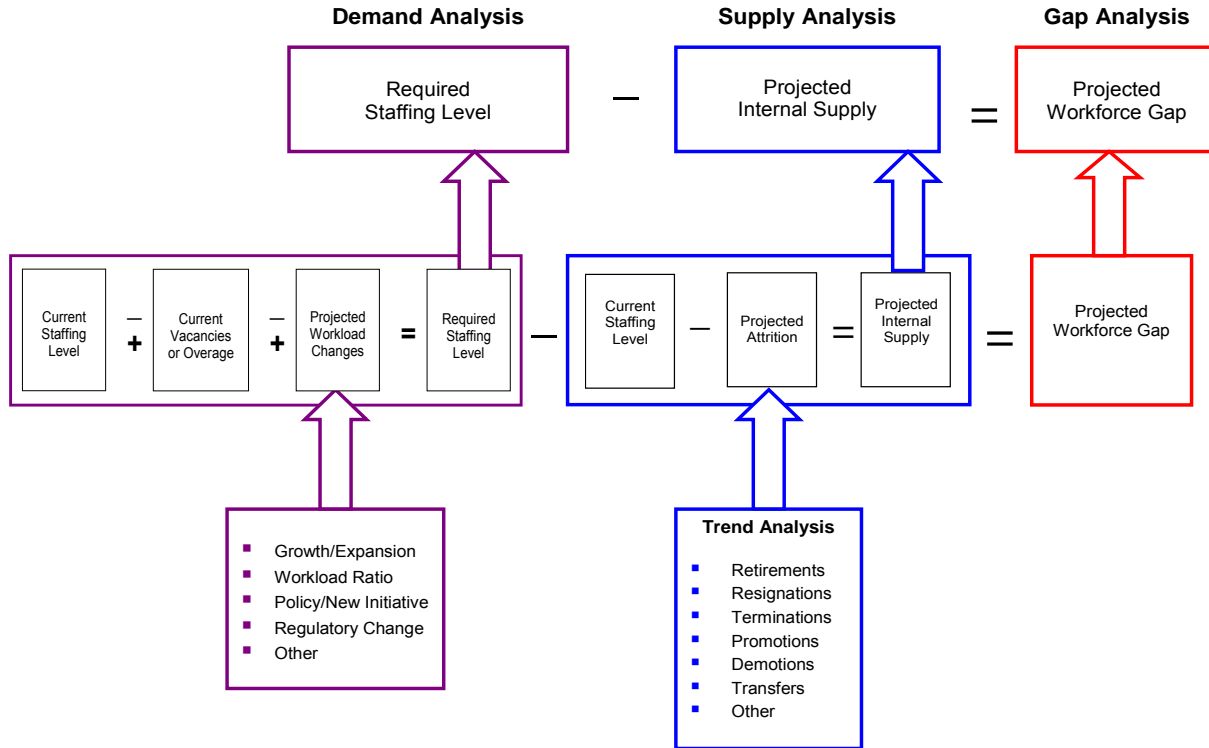
- An eight-step Supply/Demand Analysis and Gap Analysis overview with links to the appropriate tools.
- Specific and detailed descriptions about how to conduct a Workforce Planning Supply Analysis, a Demand Analysis, and a Gap Analysis.
- Forms, Templates, Questionnaires and Worksheets to use as-is or modify to meet your specific needs.
- A detailed example Case Study, featuring the hypothetical “Progressive County Department of Children Services,” illustrating how an agency can use the hands-on tools included in this Tool Kit. Although the example is specific to child welfare, the underlying approach is applicable to any human services setting.

The Supply/Demand Analysis and Gap Analysis process, graphically depicted in the model below, provides an overview of how you can pull together data from a variety of sources to forecast future workforce needs.

Workforce Planning: How Steps 2 and 3 Fit

At this stage of the workforce planning process, you have already given considerable thought to your agency's strategic plan, its mission, vision and values – and have come to recognize the critical role the workforce plays in achieving positive outcomes (Strategy Assessment). In Steps 2 and 3, you will conduct the analysis needed to identify the specific workforce strategies your agency will implement in order to achieve its strategic objectives.

Supply/Demand Analysis and Gap Analysis Process





Eight Steps to Completing Your Supply/Demand Analysis and Gap Analysis

To Complete This Step:	Use This Tool:
1. Determine which job classifications will be the focus of your Workforce Planning analysis.	<u>Targeted Classifications Worksheet</u>
2. Determine the competencies (knowledge, skills, behaviors, personal attributes, or other characteristics that are associated with or predictive of superior job performance) necessary for your agency to succeed in its mission and strategic objectives.	<u>Competency Menu Rating Form</u>
3. Determine the changes in the number of employees needed in the targeted classifications in the future.	<u>Workload Change Worksheets</u> <u>Workload Change Summary Worksheet</u>
4. Forecast attrition from the targeted classifications.	<u>Worksheet: Attrition Projection</u>
5. Further refine your forecasting of retirements and/or promotions.	<u>Retirement Intention Survey</u>
6. Identify staffing gaps – either the surpluses or shortages – in the targeted classifications.	<u>Gap Analysis: Staffing Assessment Template</u>
7. Assess the staffing gaps between different time periods.	<u>Multi-Year Gap-Analysis Summary</u>
8. Identify the gaps between the competencies currently possessed and those needed now and in the future.	<u>Competency-Gap Assessment Form</u>



Throughout the Tool Kit, we've used this symbol to indicate the steps and tools listed in this table.

Introduction to Workforce Planning

Before walking through the process for developing an implementation and evaluation strategy for your workforce plan, it's constructive to establish a common foundation and understanding of Workforce Planning:

Workforce Planning is the process of ensuring that an organization can achieve its mission by having the right people with the right skills in the right places at the right times.

Operationally, Workforce Planning is a systematic process for identifying the human capital required to meet organizational goals and developing the strategies to meet these requirements.¹ Workforce Planning also includes the logical next step – identifying how to eliminate these talent gaps and develop the competencies needed for success.

This is particularly important in human services agencies where the introduction of new reforms, changing expectations, refocused program emphasis, new client populations, and the demand to become “outcome oriented” may require the workforce to have new and different skills and competencies.

Workforce Planning is more critical than ever today, to prepare agencies for the workforce crisis that is being created by profound demographic shifts. At the macro level, for example, there are more than 80 million baby boomers in the United States today, accounting for almost 28 percent of our nation's population. As these boomers begin to retire in large numbers, the entire nation will face a workforce crisis because there are only 40 million in the population to replace the baby boomers.

Moreover, as the nation's population and workforce increasingly diversify, agencies will need to adapt their cultures, management and human resources approaches to this diversity. The agencies that do this in a carefully planned way will succeed in attracting and retaining talent.

Baby Boomers and Public-Sector Workforce Planning

The crisis of retiring “baby boomers” will hit government first because public sector workers are, on average, older than private sector workers. Plus, most public servants can retire earlier than their private sector colleagues. It is anticipated that over one million baby boomer human service workers will be eligible for retirement.¹ But the workforce challenge is not simply about the overall worker shortage. Many of the baby boomer retirees will be the public sector's most experienced and talented leaders. As these people leave the workforce, agencies will need to retain and transfer their knowledge. To succeed, public sector agencies must build their leadership pipelines now.

¹ *CPS Human Resource Services. 2006. [Workforce Planning Overview](#). See also: *CPS Human Resource Services. 2005. [Building the Leadership Pipeline in Local, State and Federal Government](#).**

¹ National Academy of Public Administration. May 2000. *Building Successful Organizations: A Guide to Strategic Workforce Planning*. www.napawash.org/publications.html.

Those that don't evolve face the very real risk of failing to achieve their mission, and their potential.

It's important to keep in mind that WFP is not a one-time event; it's about developing competencies to address workforce issues over time. Agencies that commit to the development of a workforce plan will gain a thorough understanding of their current workforce and will identify the competencies that will move the agency forward. Workforce planning puts the agency "one step ahead", resulting in informed staffing decisions that benefit the agency in both the short term and long term. More importantly, it helps recognize the most effective and efficient use of employees in creating a workforce that is and will continue to be flexible and responsive.

Tool 1 – The Supply and Demand Analysis

Getting Started

A good place to begin the Supply and Demand Analysis is to think as broadly as possible about the kinds of information you will need for your planning efforts.

Pull together a small workgroup that includes people who have knowledge of and responsibility for Human Resources, day-to-day operations, strategic planning, budget and IT. This group will spearhead your Supply/Demand initiative. They will start by brainstorming overarching issues with the goal of identifying:

- The job classifications to target for the Supply/Demand Analysis.
- The implications of your current workforce demographics.
- How far into the future you should project your Supply/Demand Analysis planning.



Identify the job classifications to target for the Supply/Demand Analysis.

To help you determine which job classifications to target, use the [Targeted Classifications Worksheet](#).

➤ Tip:

Before thinking about the future, it is important to know where you're starting from. Now is a good time to think broadly about your current workforce:

- Does a gap presently exist between your demand and your supply of employees in the targeted class?
- How many vacancies do you normally carry at a given time?
- Do you have a difficult time recruiting qualified applicants?
- What percentage of your current employees exhibit the competencies needed to do the job well?



Targeted Classification Worksheet

- Use this worksheet to help determine which classifications to include in your agency's Supply/Demand Analysis.
- When answering the following, remember to factor in the supervisors of the classification you're considering.
- Include in your Supply/Demand Analysis any classification identified in three or more of the eight questions listed.

1. The largest job classifications used by our agency are:	
2. The classifications having the greatest impact on the clients/customers we serve are:	
3. The classifications where we observe the largest gap between employee performance and the agency's expectations are:	
4. The classifications where we experience the highest turnover are:	
5. The classifications where we expect the greatest percentage of retirements are:	
6. The classifications where we have our greatest recruitment difficulty are:	
7. The classifications in which we foresee the greatest changes in service delivery approaches and/or performance expectations during the next few years are:	
8. The classifications most likely impacted by a new service delivery initiative are:	

Depending on the size and variety of services provided by the agency, the number of targeted classifications can range from only a few to most of the classifications. Typically, agencies focus their Supply/Demand Analysis on the specific job classifications that have the greatest impact on the agency's success. However, some apply the Supply/Demand Analysis across the entire agency and/or focus on broad occupational groupings.

Identify the implications of your current workforce demographics.

Before beginning, it's important to have an accurate profile of your current workforce, and identify current staffing issues, such as:

- Workforce diversity.
- Flexible and family-friendly work schedules.
- Threats to institutional knowledge as a result of impending retirements.
- Intergenerational work values.

To help you identify and assess these issues, gather as much information as possible about the details of the current workforce. Most agencies produce a variety of reports which provide:

- Number of employees by classification and/or location
- Age, gender and race
- Education level and specific degrees
- Wage and salary information
- Appointment status (permanent, temporary, part-time, job-share, etc.)
- Retirement eligibility
- Length of service and seniority
- Turnover

The [Environmental Scan and SWOT Analysis Tool Kit](#) can help you identify, gather and analyze the data necessary for obtaining an accurate picture of your current workforce.

Identify how far into the future to project your Supply/Demand Analysis planning.

We recommend aligning the timing of your Supply/Demand Analysis to your agency's strategic plan. For example, if you have a three-year strategic plan, we recommend setting up "interval planning" for your Supply/Demand Analysis – one year out, two years out and three years out.

In addition, if your agency is implementing a new service-delivery initiative like Family-to-Family (F2F) or Juvenile Detention Alternatives Initiative (JDAI), we recommend that your

Supply/Demand Analysis plan includes at least three guideposts:

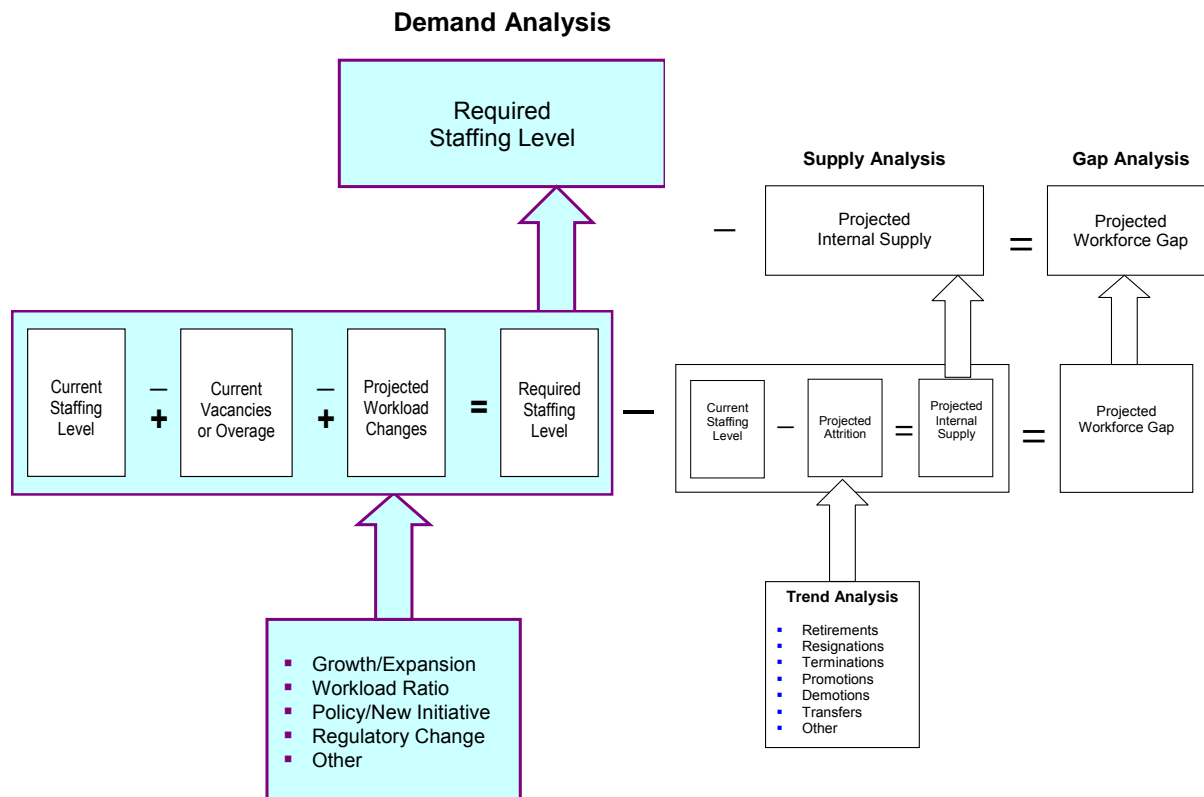
1. Date of initial implementation.
2. Date of full implementation.
3. One year after full implementation for review and evaluation of results.

➤ **Tip:**

Supply and demand projections tend to become less reliable the further in the future the forecast. When projecting well into the future, we recommend revisiting your planning assumptions and making modifications where necessary.

Remember: workforce planning is a process – not an event!

Supply and Demand Part 1 – The Demand Analysis



The **Demand Analysis** identifies your agency’s workforce needs:

- The starting point for your Demand Analysis is based on the number of staff you currently have – not on the number you need.
- The Demand Analysis must identify not only the *numbers* of staff needed (**Staffing Assessment**), but also the *competencies* that are critical to successful job performance (**Competency Assessment**).
- The focus of the Demand Analysis is identifying the *functions* that an agency must perform, not just the people needed to carry out the functions.
- The Demand Analysis should also examine *changes in functions*. These changes might have a significant impact on the size and kind of workforce needed in the future. In fact,

➤ **Tip:**

The Demand Analysis can provide one of the greatest benefits in workforce planning because it offers the chance for an agency to re-examine long-standing assumptions about the purpose and direction of its programs in light of the changes taking place.

the *kind* of staff you have today may not meet your current needs, let alone your future needs.

Once you've decided which classifications to target, you'll need to conduct both a Staffing and Competency Assessment in order to get a full understanding of your workforce. You should spend some time thinking about whether to start your Supply/Demand Analysis with a Competency Assessment or the Staffing Assessment. The following guidelines will help you decide:

Guidelines: Starting with a Competency Assessment or Staffing Assessment

- **Competency Assessment First:** When introducing a new service delivery initiative, such as Family to Family (F2F) or the Juvenile Detention Alternatives Initiative (JDAI), the competency requirements for the position are likely to change. In fact, the Competency Assessment may lead you to conclude that you need a new job classification. For example, introducing the F2F model may result in the creation of a Team Decision Making Facilitator position.
- **Competency Assessment First:** When there is a significant gap between job performance and agency expectations in the targeted classification, we recommend starting with the Competency Assessment. Such an assessment may lead to discussions of job reengineering, new classifications and/or technology changes, having a significant impact on the number of employees needed.
- **Staffing Assessment First:** When you have “the right kind of people in the job,” and you expect the nature of the work to remain fairly stable, starting with the Staffing Assessment makes perfect sense.

➤ Tip:

The results you obtained from the *Targeted Classification Worksheet* provide you with most of the information you need to decide whether to start your Demand Analysis with the Competency Assessment or the Staffing Assessment.



Demand Analysis: Staffing Assessment

The Staffing Assessment requires you to think carefully about the *numbers* of staff needed to fulfill your current and future workforce needs.

Many, if not most, human services agencies are seriously understaffed. They simply lack the budgetary resources – and the underlying political support – to hire the number of employees they need. You should base the assessment of your future staffing needs on realistic projections – the kind of information you will obtain by completing the

➤ Tip:

In larger human services agencies, the research and planning departments may already have sophisticated forecast models that project the demand for customer/client services. You can plug these numbers into the *Workload Change Worksheets*.

[Environmental Scan/SWOT Analysis](#) (Step 2 of the Workforce Planning process).

Use the [Workload Change Worksheet](#) and the [Workload Change Summary Worksheet](#) to project your staffing needs for the future – they help provide a structured approach to collecting and analyzing data, and documenting future staffing needs.

In projecting your future staffing needs, consider:

- **Policy Changes/New Initiatives:** New program initiatives or “reforms” may have significant staffing implications. The new service delivery model may require more time working directly with clients/customers, require additional paperwork, or result in working in teams.
- **Mandated Regulatory Changes:** Work requirements can change as a result of federal, state or local requirements. Court orders and consent decrees may require new client-worker ratios. Collective bargaining agreements sometimes mandate staffing levels or workload limitations.
- **Planned Growth/Expansion:** The demand for agency services may change as a result of population shifts, unemployment rates, substance abuse changes within your client population, or any of the many other social issues that affect the demand for human services.
- **Other Factors Affecting Staffing:** Any number of other factors may change your staffing requirements. Technological innovations may reduce the number of employees needed to do the same amount of work. Staffing ratios may change as a result of available resources and shifting priorities.



Workload Change Worksheet

Classification:

Description of Policy Change/New Initiative		Effective Date
		<input type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
Anticipated Changes in Staffing		
Increase in FTEs:	positions	Projected Effective Date:
Decrease in FTEs:	positions	Projected Effective Date:
Description of Mandated Regulatory Change		Effective Date
		<input type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
Anticipated Changes in Staffing		
Increase in FTEs:	positions	Projected Effective Date:
Decrease in FTEs:	positions	Projected Effective Date:



Workload Change Worksheet

Classification:

Description of Planned Growth/Expansion		Effective Date
		<input type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
Anticipated Changes in Staffing		
Increase in FTEs:	positions	Projected Effective Date:
Decrease in FTEs:	positions	Projected Effective Date:
Description of Other Factors Affecting Staffing		Effective Date
		<input type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
Anticipated Changes in Staffing		
Increase in FTEs:	positions	Projected Effective Date:
Decrease in FTEs:	positions	Projected Effective Date:



Workload Change Summary Worksheet

Classification:

Effective Date:

Workload Change Factors	Staffing Increase	Or	Staffing Decrease
Policy Change/New Initiative			
Mandated Regulatory Changes			
Planned Growth/Expansion			
Other Factors Affecting Staffing			
TOTALS			
Net Change			



Demand Analysis: Competency Assessment

Your demand analysis isn't just about calculating the number of staff you'll need now and in the future. The purpose of doing the Competency Assessment is to determine whether your current workforce includes the *kind* of employees needed both now and in the future.

We define competencies as: *the knowledge, skills, behaviors, personal attributes, or other characteristics that are associated with or predictive of superior job performance*. Identifying the necessary competencies for the targeted job classification requires answering two key questions:

1. What competencies do employees doing this job currently require?
2. What competencies will be required to do this job in the future?

The [Competency Menu Rating Form](#) provides a menu of competencies that may be appropriate for a wide array of human service jobs. Not all of the competencies listed on the form are relevant to all human service jobs.

There are several strategies you can use to identify the competency requirements for the targeted position. Using the [Competency Menu Rating Form](#) is a fairly straightforward methodology that requires minimal time and resource commitment. If you wish to undertake a more rigorous competency analysis, use the methodology included in the [Gap-Closing Strategies Tool Kit](#).



Guidelines: Using the Competency Menu Rating Form

- Pull together a focus group of subject matter experts and identify a facilitator. Subject matter experts are people most familiar with the way the targeted job is performed by those high-performing employees who meet or exceed the agency's expectations. Typically these are the exemplary supervisors and frontline workers.
- Ask the focus group members to rate the degree of competency required to do the targeted job both now and in the future.
- The objective is to narrow the list of competencies to the ten or twelve most important to successful performance in the targeted position.
- The facilitator should help the focus group reach a consensus scoring on each competency using the following rating scale:

Competency Rating Instructions:

Competencies are: the knowledge, skill, behaviors, personal attributes, or other characteristics associated with or predictive of superior job performance.

For each of the listed competencies, and in the appropriate column, indicate the degree to which the competency is:

- **Currently possessed** by the employees in the classification,
- **Currently required** to accomplish the work of the classification,
- **Will be required in the future** based upon the organization's strategic plan or changing business requirements.

Use the **Competency Rating Scale:**

- 0 – Competency is Not Required
- 1 – Basic Level of Competency
- 2 – Intermediate Level of Competency
- 3 – Advanced Level of Competency

- If the focus group can't reach consensus on ranking the competencies, the facilitator can ask the participants to assign the ranking scale and then use the average of the results.
- Once the focus group has ranked each competency in order of importance, the facilitator should use a flip chart to list those competencies with a score of 3 points – "Advanced Level of Competency."
- If the list includes more than ten to twelve competencies, the facilitator should use the consensus process to reduce the list to no more than twelve.

➤ **Tip:**

The *Competency Menu Rating Form* includes a rating scale for "Currently Possessed" competencies. Although this is part of the Supply Analysis, it is more efficient for the focus group to complete all three columns at the same time. See Tool 2: Supply Analysis, and Tool 3: Gap Analysis for more on filling out this column.



Competency Menu Rating Worksheet

Competency	Definition	Currently Required (Demand Analysis)	Required in Future (Demand Analysis)	Currently Possessed (Supply Analysis)
Action Oriented	Consistently maintains high levels of activity or productivity; sustains long working hours when necessary, works with vigor, effectiveness and determination over a sustained period.			
Adaptability (Do not use with Facilitating Change)	Adapts well to changes in assignments and priorities; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; approaches change positively and adjusts behaviors accordingly.			
Applied Learning (Do not use with Continuous Learning and Professional Development)	Able to learn and properly apply new job-related information in a timely manner. Has the ability to absorb and comprehend job-related information from formal training and other formal and informal learning experiences.			
Building Trust	Interact with others in a way that gives them confidence in one's motives and representations and those of the organization. Is seen as direct and truthful; keeps confidences, promises, and commitments.			
Coaching	Providing timely guidance and feedback to help others strengthen knowledge/skills areas needed to accomplish a task or solve a problem.			
Collaboration	Builds constructive working relationships with clients/customers, other work units, community organizations and others to meet mutual goals and objectives. Behaves professionally and supportively when working with individuals from a variety of ethnic, social and educational backgrounds.			
Communication	Clearly conveys and receives information and ideas through a variety of media to individuals or groups in a manner that engages the listener, helps them understand and retain the message, and invites response and feedback. Keeps others informed as appropriate. Demonstrates good written, oral, and listening skills			

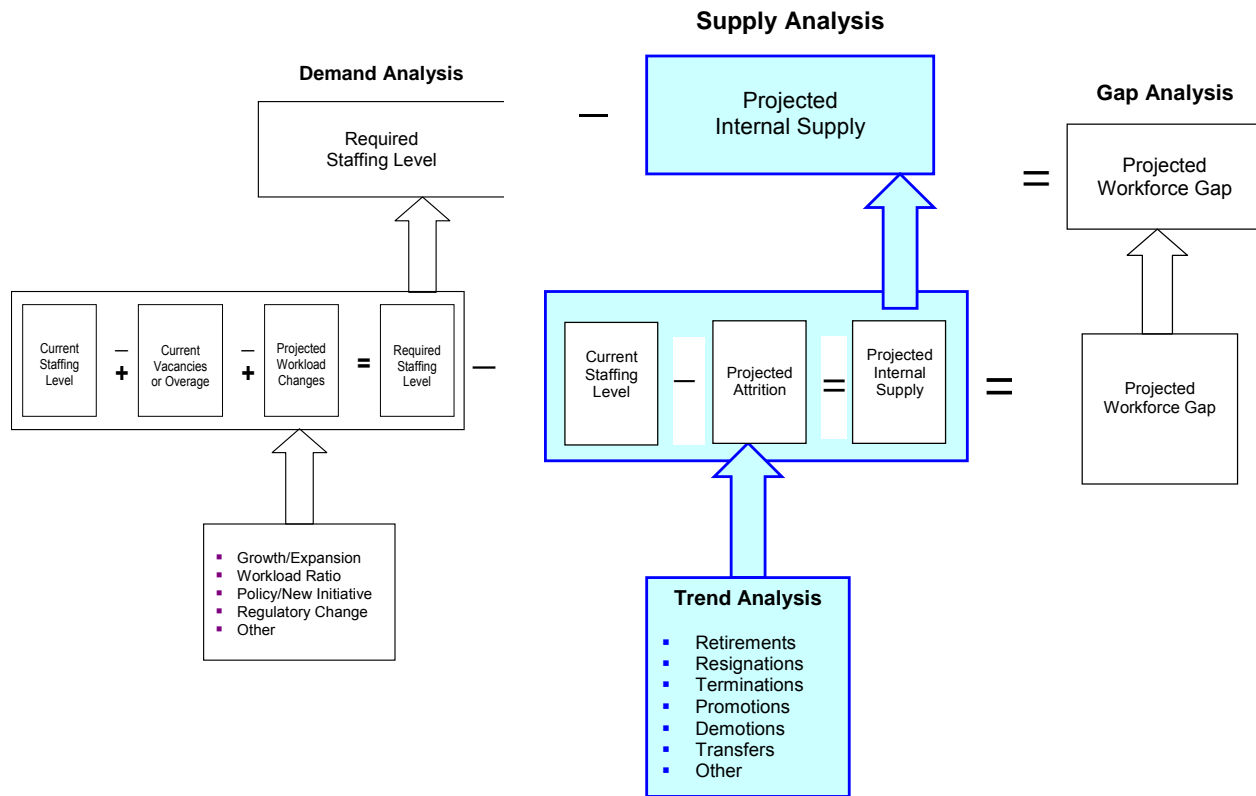
Competency	Definition	Currently Required (Demand Analysis)	Required in Future (Demand Analysis)	Currently Possessed (Supply Analysis)
Conflict Management	Uses appropriate interpersonal styles and techniques to reduce tension and/or conflict between two or more people; able to size up situations quickly; able to identify common interests; facilitates resolution.			
Continuous Learning and Professional Development (Do not use with Applied Learning)	Is committed to developing professionally, attends professional conferences, focuses on best practices, values cutting-edge practices and approaches; takes advantage of a variety of learning activities, introduces newly gained knowledge and skills on the job.			
Cultural Competence	Cultivates opportunities through diverse people; respects and relates well to people from varied backgrounds, understands diverse worldviews, and is sensitive to group differences; sees diversity as an opportunity, challenges bias and intolerance.			
Customer/Client Focus	Makes customers/clients and their needs a primary focus of one's actions; shows interest in and understanding of the needs and expectations of internal and external customers (including direct reports); gains customer trust and respect; meets or exceeds customer expectations			
Decision Making/Problem Solving	Breaks down problems into components and recognizes interrelationships; makes sound, well-informed, and objective decisions. Compares data, information, and input from a variety of sources to draw conclusions; takes action that is consistent with available facts, constraints, and probable consequences.			
Delegating Responsibility	Comfortably delegates responsibilities, tasks, and decisions; appropriately trusts others to perform; provides support without removing responsibility.			
Developing Others (non-supervisory relationship; supervisors use Guiding and Developing Staff)	Helps plan and supports the development of individuals' skills and abilities so that they can fulfill current of future job/role responsibilities more effectively.			

Competency	Definition	Currently Required (Demand Analysis)	Required in Future (Demand Analysis)	Currently Possessed (Supply Analysis)
Facilitating Change (Do not use with Adaptability)	Facilitates the implementation and acceptance of change within the workplace; encourages others to seek opportunities for different and innovative approaches to addressing problems and opportunities.			
Follow-up	Monitors the work of direct reports to insure quality standards and thoroughness; considers the knowledge, experience, and skill of staff members when determining extent of review.			
Formal Presentation Skills	Effectively presents ideas, information and materials to individuals and groups. Effectively prepares and provides structured delivery; facilitates workshops or meetings in a structured manner, can facilitate and manage group process.			
Guiding and Developing Staff (supervisory competency: non-supervisors use Developing Others)	Focuses and guiding others in accomplishing work objectives; rewards and recognizes others, both formally and informally, in ways that motivate them. Sets high performance expectations for team members; sets clear performance expectations and objectives; holds others accountable for achieving results. Successfully finds resources, training, tools, etc. to support staff needs. Works with staff to create developmental opportunities to expand knowledge and skill level; provides effective feedback and guidance for career development.			
Influence	Uses appropriate interpersonal skills and techniques to gain acceptance for ideas or solutions. Uses influencing strategies to gain genuine agreements; Seeks to persuade rather than force solutions or impose decisions or regulations.			
Initiative	Takes action without being asked or required to; achieves goals beyond job requirements; being proactive; taking prompt action to accomplish objectives.			
Innovation	Uses creativity and imagination to develop new insights into situations and applies new solutions to problems. Comes up with new and unique ideas.			

Competency	Definition	Currently Required (Demand Analysis)	Required in Future (Demand Analysis)	Currently Possessed (Supply Analysis)
Managing Work (supervisory competency: non-supervisors use Planning and Organizing)	Shows ability to plan, schedule, direct work of self and others; balances task requirements and individual abilities; organizes materials to accomplish tasks; sets challenging yet achievable goals for self and others.			
Negotiation	Effectively exploring alternatives and positions to reach agreements and solutions that gain the support and acceptance of all parties.			
Planning and Organizing (non-supervisory competency: supervisors use Managing Work)	Organizes work, sets priorities, and determines resources requirements; determines necessary sequence of activities needed to achieve goals.			
Quality Orientation	Monitors and checks work to meet quality standards; demonstrates a high level of care and thoroughness; checks work to ensure completeness and accuracy.			
Risk Taking	Seeks opportunities and calculates risks to accomplish results that can lead to substantial benefit knowing the real possibility of significant negative consequences.			
Safety Awareness	Being aware of conditions and circumstances that affect one's own safety or the safety of direct reports.			
Strategic Focus	Understands how an organization must change in light of internal and external trends and influences; keeps the big, long range picture in mind; builds a shared long-range organizational vision with others. Committed to course of action to achieve long-range goals and influences others to translate vision into action.			
Stress Tolerance	Maintains effective performance under pressure; handling stress in a manner that is acceptable to others and to the organization.			

Competency	Definition	Currently Required (Demand Analysis)	Required in Future (Demand Analysis)	Currently Possessed (Supply Analysis)
Team Leadership (supervisory competency: non-supervisors use Teamwork)	Communicates a vision and inspires motivation; engages with others (direct-reports and peers) in team process to solve problems; works to find a win/win resolution of differences; is aware of how management style impacts staff productivity and development; modifies leadership style to meet situational requirements; helps team stay focused on major goals while managing within a context of multiple directives.			
Teamwork (non-supervisory competency: supervisors use Team Leadership)	Participates as an active and contributing member of a team to achieve team goals. Works cooperatively with other team members, involves others, shares information as appropriate, and shares credit for team accomplishments.			
Technical/ Professional Knowledge and Skills	Possesses, acquires, and maintains the technical/professional expertise required to do the job effectively and to create client/customer solutions. Technical/professional expertise is demonstrated through problem solving, applying professional judgment, and competent performance.			
Visionary Leadership	Keeps the organization's mission, vision, and values at the forefront of employee decision making and actions; ensures alignment of organization's strategic plan and agency practices with vision, mission and values.			
Work Standards	Sets high standards and well-defined, realistic goals for one's self; displays a high level of effort and commitment towards completing assignments in a timely manner; works with minimal supervisor; is motivated to achieve.			

Supply and Demand Part 2 – The Supply Analysis



The **Supply Analysis** identifies your agency’s available staffing resources – both now and in the future. In the Supply Analysis you will:

- Focus on the current staffing level in the targeted job classification(s).
- Identify all the personnel actions that can impact future staffing levels (retirements, resignations, terminations, promotions, demotions, transfers, etc.)
- Factor in these actions to project your future staffing levels.

As with the Demand Analysis, the Supply Analysis includes a Staffing Assessment and a Competency Assessment.

Does your Supply really Supply your Need?

One of the conundrums of Supply Analysis is how you define your supply. Is it the number of “bodies,” or is it what’s in the “hearts, hands and minds” of those bodies? If you have 100 Juvenile Probation Officers, but only 80 of them have the competencies required to do the job effectively, is your supply of JPOs 80 or 100? Actually, it’s both. And that goes to the heart of why your Supply Analysis has to look at both the numbers and the competencies of your workforce. You must look beyond the numbers and assess the kind of competencies possessed by your current workforce.

Getting Started – Develop a Profile of your Current Workforce

When conducting a Supply Analysis, it is important to develop a profile of the present workforce. In most agencies, the data needed to develop a workforce profile is accessible from the agency’s human resources information system (HRIS) or payroll system. Regardless of whether your agency has a HRIS, you should identify and use whatever data your agency has available. For more information about obtaining data about your current workforce, refer to the [Environmental Scan and SWOT Analysis Tool Kit](#).

Demographic Data: It is helpful to prepare a spreadsheet to document demographic information by classification and organizational unit (see sample below). Such reports provide an overview of the diversity of your workforce, and may suggest issues that need to be addressed.

Agency Demographic Data – Sample Table

AGE	White		African American		Hispanic		Asian		Total	
	No. Male	No. Female	No. Male	No. Female	No. Male	No. Female	No. Male	No. Female	No. Male	No. Female
x < 25 yrs										
25 ≤ x < 30										
30 ≤ x < 35										
35 ≤ x < 40										
40 ≤ x < 45										
45 ≤ x < 50										
50 ≤ x < 55										
55 ≤ x < 60										
60 ≤ x < 65										
x ≥ 65 yrs										
TOTAL										

Retirement Eligibility Data: Every agency engaging in Workforce Planning should pay close attention to retirement eligibility data. Agencies should analyze their retirement eligibility data by classification and department (organizational unit) to identify the areas of greatest vulnerability. You can customize the [Retirement Eligibility by Job Classification](#) and [Retirement Eligibility by Department Templates](#) to meet your agency’s needs.

Report Template: Retirement Eligibility by Job Classification

Date:		Currently Eligible			Eligible in Three Years		Eligible in Five Years	
Class.	Dept.	No. in Dept.	No. Ret. Elig.	Percent Ret. Elig.	No. Elig.	Percent Ret. Elig.	No. Elig	Percent Ret. Elig.
Class A (Soc Worker)								
Class B (Supervisor)								
Class C (Manager)								
Class D (Director)								
Classification Summary								
Date:		Currently Eligible			Eligible in Three Years		Eligible in Five Years	
Class.		Class. Total	No. Ret. Elig.	Percent Ret. Elig.	No. Elig.	Percent Ret. Elig.	No. Elig	Percent Ret. Elig.
Class A (Soc Worker)								
Class B (Supervisor)								
Class C (Manager)								
Class D (Director)								
Agency Total								

Report Template: Retirement Eligibility by Department

Date:		Currently Eligible			Eligible in Three Years		Eligible in Five Years	
Dept.	Class.	No. in Class.	No. Ret. Elig.	Percent Ret. Elig.	No. Elig.	Percent Ret. Elig.	No. Elig	Percent Ret. Elig.
Dept. 1	A							
	B							
	C							
	D							
Dept. 2	A							
	B							
	C							
Dept. 3	C							
	E							
	F							
	G							
Dept. 4	B							
	D							
	F							
	G							
Department Summary								
Date:		Currently Eligible			Eligible in Three Years		Eligible in Five Years	
Class.		Dept. Total	No. Ret. Elig.	Percent Ret. Elig.	No. Elig.	Percent Ret. Elig.	No. Elig	Percent Ret. Elig.
Dept. 1								
Dept. 2								
Dept. 3								
Dept. 4								
Agency Total								

The Aging and Retiring Government Workforce

Profound demographic shifts in the workforce are occurring because of the disproportionate share of workers reaching retirement age. This is particularly critical for the human services workforce where governmental employees account for a large share of service providers. Workforce statistic show public sector workers on average are older, and able to retire earlier, than in the private sector. For more information, see, [The Aging-and-Retiring Government Workforce](#).

Educational Background Data: Many agencies will find it useful to analyze the educational level and degrees/majors of employees by classification. You can customize the [Educational Level and Degrees by Classification Template](#) below to include the degrees and majors used by your agency. More sophisticated reports can be developed to analyze other variables such as turnover and competency level by degree.

Report Template: Educational Level and Degrees by Classification

Date:		Bachelors												Masters and higher											
		Soc Wk		Crim Just		Psych		Soc		Other		Total		Soc Wk		Crim Just		Psych		Soc		Other		Total	
Class.	No. of Emps.	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%		
Class A																									
Class B																									
Class C																									
Class D																									
Class E																									
Class F																									
Class G																									
Class H																									

Vacancy Data: Use the [Vacancy by Classification Template](#) below to complete a point-in-time assessment of the number and percentage of vacancies in all or selected classifications. By repeating the point-in-time assessments for different time periods, you will be able to use the data to determine your average vacancy rate. Many agencies have automated systems that can track the length of time it takes to fill vacancies.

Report Template: Vacancy by Classification

Date:	Pay Period:						
Classifications	Class A	Class B	Class C	Class D	Class E	Class F	Class G
Number Authorized	x						
Number Filled	y						
Number of Vacancies	(x-y)						
Percentage Vacant	(x-y)/x						

Supply Analysis: Staffing Assessment

In the Supply Analysis Staffing Assessment, you will:

- Forecast future staff attrition - estimate the losses to your labor supply during the Workforce Planning period. The timeframes you choose should coincide with those used in the Demand Analysis.
- Determine the number of employees who leave the targeted classifications *for any reason*.
- This process involves projecting your current workforce into the future as if no management action were taken to replace attrition or develop existing staff.

Option 1 – Turnover Data Reports: You may be able to use your agency’s reports on staff turnover to forecast future attrition. By our definition, “detailed” turnover data includes all departures from the target classification including:

- Retirements
- Resignations
- Terminations
- Promotions
- Demotions
- Transfers
- Other

Beyond this, detailed turnover data should include demographic information about the departing employees. In addition, we recommend examining your turnover data by educational degree and years of service. For example, depending on the nature of the services provided by your agency, it is important to know if you lose all of your MSW employees within the first year of employment, or if your Criminal Justice majors usually stay until retirement.

For more information about gathering turnover data and templates for creating very detailed turnover reports, see the [Turnover Tool Kit](#). Even if you do not have the ability to automate the process, filling out these reports manually can provide much of the information you need for the Supply Analysis Staffing Assessment.

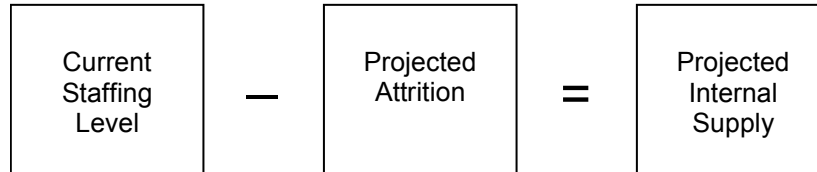
Option 2 – Attrition Data: If your agency does not compile detailed turnover data, you will need to pull together this data manually to forecast future attrition.

➤ Tip:

If you are planning to use your agency’s turnover data, remember to include all types of departures from the classification – not just departures from your agency.

Overall Projected Attrition and Projected Internal Supply

The overall projected attrition represents the total number of employees expected to vacate the targeted classification within the time period covered by the Supply/Demand Analysis. Subtracting the projected outflow (attrition) from the current number of employees on board will determine the projected labor supply in the targeted classification:



Forecasting Attrition: Trend Analysis

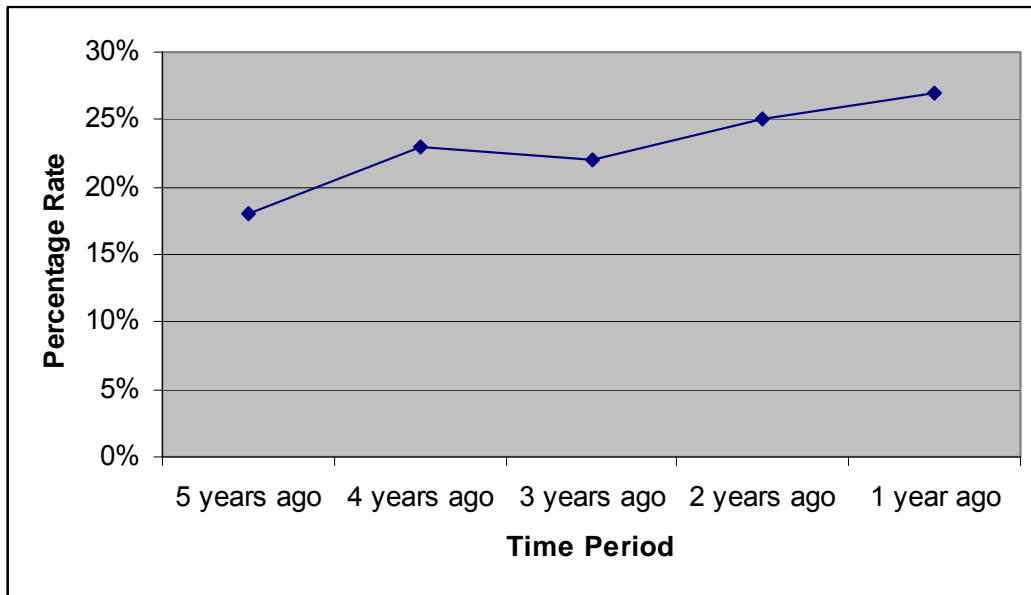
A commonly used method of forecasting workforce changes is the trend analysis. If your agency has detailed turnover data, using that data to forecast future turnover is a relatively simple matter. Use the table below as a model:

Sample Report: Turnover – Job Class A

Turnover Time Period	Percentage Annual Turnover Rate
Last Year's Turnover Rate	27%
Turnover Rate 2 years ago	25%
Turnover Rate 3 years ago	22%
Turnover Rate 4 years ago	23%
Turnover Rate 5 years ago	18%
Sum of Rates	115%
Average Turnover Rate = Total Rate Divided by number of years	115/5
Average Annual Turnover Rate	23%

Simply looking at the average turnover rate in this example (23 percent) may not provide a comprehensive picture of what's happening in the agency. If you plotted these turnover rates on a graph, you would see a trend line that shows turnover increasing at a rate of about 2 percent per year:

Percentage Annual Turnover Rate – Job Class A



Based on this data alone, we could project the turnover rate in the target classification to be about 29 percent for the coming year, and 31 percent for the following year.

For a more complete picture, you should combine this data with the information you collected during the Environmental Scan/SWOT Analysis (step 2 in the Workforce Planning process). This may impact your turnover projection.



Forecasting Attrition – Attrition Projection Worksheet: If your agency does not keep detailed turnover data, we recommend you use the [Attrition Projection Worksheet](#) and instructions.



Attrition Projection Worksheet – Blank Template

Classification:								
Date:								
Column Numbers	1	2	3	4	5	6	7	8
Reason for Attrition	Average Percentage Attrition (Trend)	Current Number in Class	Projected Average Attrition	Attrition Adjustment (Year One)	Total Projected Attrition (Year One)	Attrition Adjustment (Year Two)	Total Projected Attrition (Year Two)	Total Projected Attrition (Both Years)
Retirements								0
Resignations								0
Terminations								0
Promotions								0
Demotions								0
Transfers								0
Other								0
Total Attrition/ Turnover	0.0%		0	0	0	0	0	0

Attrition Projection Worksheet – Sample Data

Classification: Child Welfare Caseworker								
Date: 12/31/05								
Column Numbers	1	2	3	4	5	6	7	8
Reason for Attrition	Average Percentage Attrition (Trend)	Current Number in Class	Projected Average Attrition	Attrition Adjustment (Year One)	Total Projected Attrition (Year One)	Attrition Adjustment (Year Two)	Total Projected Attrition (Year Two)	Total Projected Attrition (Both Years)
Retirements	0.0%	100	0	3	3	3	3	6
Resignations	15.0%	100	15	0	15	0	15	30
Terminations	2.0%	100	2	0	2	0	2	4
Promotions	1.0%	100	1	2	3	3	4	7
Demotions	1.0%	100	1	0	1	0	1	2
Transfers	0.0%	100	0	0	0	0	0	0
Other	0.0%	100	0	0	0	0	0	0
Total Attrition/ Turnover	19.0%	100	19	5	24	6	25	49



Attrition Projection Worksheet – Instructions

Use the *Attrition Projection Worksheet* to project attrition based on your historic average attrition data. It includes adjustments to the projections based on observed trends and specific departure forecasts.

Column 1: The Average Percentage Attrition in the target classification is based on adding together the annual attrition rate for each attrition reason over a period of three to five years and dividing by the number of years used.

Column 2: Use the current number of employees on the payroll. If the current number is atypically high or low, use the average number of employees on the payroll during the past year.

Column 3: Projected Average Attrition is the number resulting from multiplying column 1 by column 2. This is the number of employees projected to leave in a one-year period based only on the mathematical average of the attrition rates.

Column 4: Shows the adjustment to the number of departures expected during the first year above or below the mathematical average (column 3) based on other information. The adjustment may be based on the trend in the attrition rates rather than just the attrition averages. The adjustment may also be based on an analysis of demographic data and/or surveys that suggest future retirements or promotions being out of line with the past trends.

Column 5: Total Projected Attrition is the sum of columns 3 and 4, and represents the agency's best estimate of projected attrition for the first year of the Workforce Planning period.

Column 6: Is conceptually the same as column 4, but represents adjustments during the second year of the Workforce Planning period, and based on special considerations affecting that time period.

Column 7: Is the sum of columns 3 and 6. This represents the agency's best estimate of projected attrition during the second year of the Workforce Planning period.

Column 8: Is the sum of columns 5 and 7 and represents that projected attrition over the full two-year Workforce Planning period.

Additional Columns: Agencies wishing to project attrition further into the future would add the appropriate number of columns to the worksheet.

Keep in mind: You will most likely need to adjust your future retirement and promotion attrition rates to reflect greater than average baby-boomer retirements and the promotions you'll need to make to replace them.

Whether you base your attrition forecasts on your detailed turnover reports or the Attrition Projection Worksheet, we recommend that you supplement it with a specific, in-depth analysis of the projected *retirement attrition* and *promotion attrition*. Without this supplemental analysis, you may not capture the full impact of your agency’s “baby boomers.” You will most likely need to adjust your attrition forecast to reflect baby-boomer retirements and the promotions you’ll need to make to replace them.



Forecasting Retirement Attrition

Many agencies have computer programs that can forecast retirement eligibility based on age and years of service. If your agency does not, you can use information from your agency’s retirement system along with an analysis of your demographic information to generate a list of employees eligible for retirement

Information regarding *eligibility* for retirement is not enough. Depending on the nature of the targeted classification and the percentage of employees in the class who are eligible to retire, it may be very important to assess the *likelihood* of retirement.

One useful approach is to survey the retirement-eligible employees about their intentions. However, we caution against selectively asking individual employees about retirement intentions because of the possibility of the question being interpreted as a form of age discrimination. The [Retirement Intention Survey](#) is designed to collect the information from all retirement-eligible staff in the target classification. Based on your analysis of the retirement retirement-eligible staff and the results from your survey, you may need to adjust your projected retirement outflow.

Forecasting Promotion Attrition

Promotions from the targeted classification are driven by what is happening at higher levels in your agency. Agencies that promote internally rather than filling vacancies from the outside experience a ripple effect whenever a manager or supervisor leaves. Again, because of the aging-workforce phenomenon – particularly in the public sector – your trend analysis may underestimate the number of promotions.

Baby Boomers and Attrition

The historic retirement and promotion attrition rates you used in your trend analysis may understate future attrition rates. Workforce planning experts have drawn the nation’s attention to the aging-workforce phenomenon attributed to the working-life cycle of “baby boomers” in the workforce. Over the next several years, we expect more retirements as the baby boomers age out of the workforce, and we expect more promotions as frontline staff replace them in supervisory and management positions.



Retirement Intention Survey

We are currently engaged in a workforce planning effort in order to help us forecast our employment needs over the next several years. We are contacting all employees (in the classification/in the agency) who are eligible for retirement to try to get a sense for their retirement plans. We would appreciate it very much if you would complete this brief survey based on your current retirement intentions. We recognize that many of you have no specific retirement plans at this point, and that even for those of you who do, circumstances may change. This data is being used only for our workforce planning purposes.

Name (Optional): _____

Date: _____

Classification: _____

	Very Unlikely	Some-what Unlikely	Unsure	Some-what Likely	Very Likely
How likely is it that you will retire with the next year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How likely is it that you will retire with the next 2 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How likely is it that you will retire with the next 3 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for assistance.

Please return your completed survey to:

Name

Address

External Labor Supply

The foregoing Supply Analysis has focused exclusively on your internal supply of human capital and how it is eroded over time by various sources of attrition. During the Environmental Scan (Step 2 of the Workforce Planning process), you may have pulled together information about the external labor supply in your community and in your extended labor market. If not, it is essential to conduct an external labor supply assessment at this point. Hard data may already exist or be relatively easy to obtain in the following areas:

- The number of applicants for each vacancy in the targeted classification.
- The length of time it takes to fill vacancies from the outside.
- Supervisors' satisfaction with the quality of new hires.
- The current and projected number of graduates from schools and colleges meeting the requirements of the targeted classification.
- Current and projected unemployment rates in your labor market.
- Organizations in your community who recruit for the employees with comparable qualifications.

You will use this data during the Gap Analysis to determine if the existing and projected external labor supply is adequate to meet your future workforce needs.

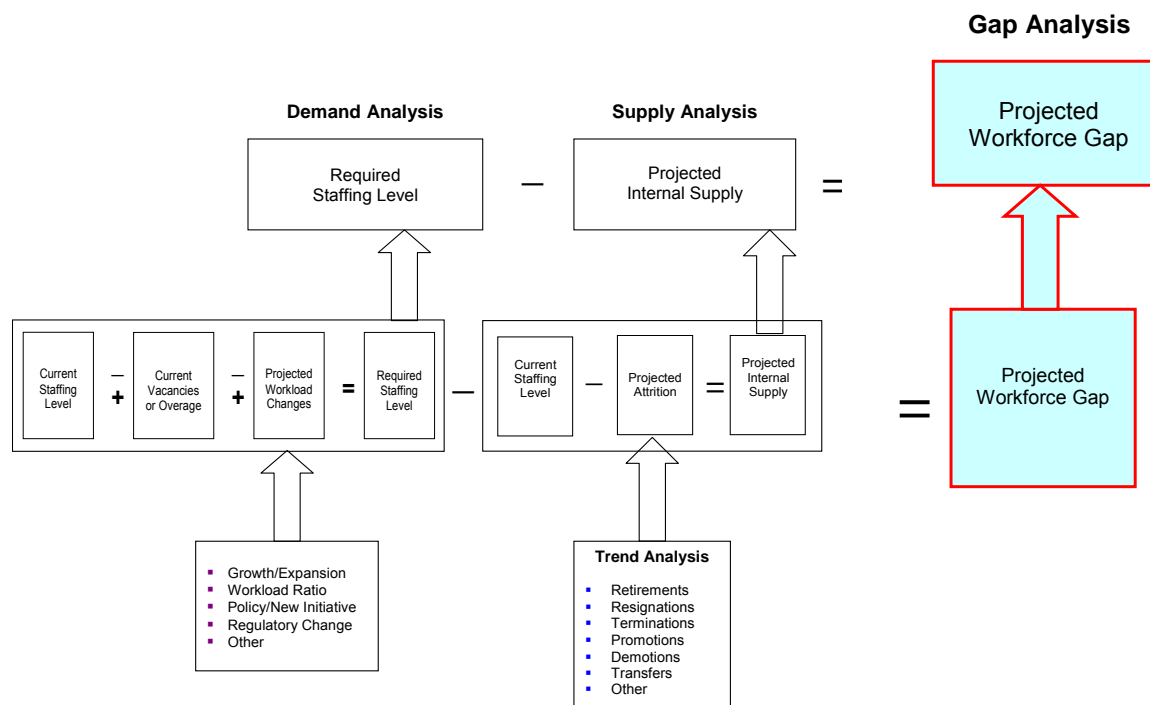
Supply Analysis: Competency Assessment

In the Competency Assessment for the Demand Analysis, you completed the [Competency Menu Rating Worksheet](#) where you identified and rated the competencies for the targeted classification. It is most efficient for the focus group to complete the form, including the last "Currently Possessed column."

In order to complete the Supply Analysis column correctly, the facilitator should ask the focus group participants to reach a consensus on the extent to which the competency is currently possessed by employees "on the whole." The focus group should not assess the level of competency possessed by an "average" employee. Instead, they are determining the extent of the competency possessed by employees "on average."

You can improve the accuracy of the assessment significantly by sending copies of the [Competency Menu Rating Worksheet](#) to a random group of supervisors and asking them to complete a confidential assessment of each of their direct reports in the target classification. Modify the form so that it includes only the competencies that the focus group ranked as being important to the position currently and/or in the future. Tabulate the completed forms to obtain the average score for each competency. Your agency may even wish to distribute the form by using an online survey instrument like [Zoomerang](#) or [Survey Monkey](#).

Tool 2 – The Gap Analysis



The **Gap Analysis** brings together the data generated by the Supply Analysis and the Demand Analysis. In this step you will:

- Assess the differences between the current and future workforce requirements.
- Look at these differences from both the competency perspective and the staffing perspective.
- Build the foundation for the Gap-Closing Strategies step of the Workforce Planning process.



Gap Analysis: Staffing Assessment

The [Gap Analysis: Staffing Assessment Template](#) synthesizes the data you gathered during the Demand Analysis and Supply Analysis. The results from this analysis will identify the gaps and surpluses in staffing levels needed for the future.

On the demand side, the analysis begins with the current staffing level and adds or subtracts the number of positions identified on the [Workload Change Worksheets](#).

On the supply side, the analysis also begins with the current staffing level, and deducts the projected attrition from the [Attrition Projection Worksheet](#).

If your Workforce Planning process includes multiple years (or other discrete time periods) you should complete a [Staffing Assessment Template](#) for each year (or period), each beginning with the current staffing level.

The results of the [Staffing Assessment Template](#) will reveal a gap or surplus:

- A gap indicates a future shortage of employees having the competencies you require. By identifying the gap well in advance, you will be able to take appropriate steps to ensure that strategies are in place to prevent the projected gap from becoming a problem.
- A surplus indicates that you will have excess staff in some categories. Again, advance planning will allow you to implement strategies that will minimize the adverse impact on employees who are no longer needed in the future.



Gap Analysis: Staffing Assessment Template

Classification:

Projected Date:

Projected Required Staffing Level (*From Demand Analysis*)

Current staffing level in the target job classification Date:		<input type="text"/>
Current Vacancies (+) / Overage (-) in target job classification	- +	<input type="text"/>
And	And	
Increase / Decrease from Projected Workload Changes	- +	<input type="text"/>
Required Staffing Level	=	<input type="text"/>

Projected Internal Supply (*From Supply Analysis*)

Current staffing level in the target job classification Date:		<input type="text"/>
Projected Attrition	-	<input type="text"/>
Internal Supply	=	<input type="text"/>
Required Staffing Level – Projected Internal Supply = Gap		<input type="text"/>
Projected Date:		<input type="text"/>



Multi-Year Gap Analysis

Classification:

Dates: N/A

Two Year Gap

Dates: Now to Two Years Out

First Year Gap

Dates: Now to One Year Out

Second Year Gap

Dates: One Year out to Two Years Out

First Year Gap: Monthly Average

Second Year Gap: Monthly Average

Gap Analysis: Competency Assessment

During the Competency Assessments in your [Supply and Demand Analyses](#), your subject matter experts rated the importance of the competencies in both the current job and the job as it will be performed in the future. They also assessed the level of competency currently possessed by those in the targeted classification.

In the Gap Analysis phase, you will review these ratings to identify any gaps that may exist between the competencies possessed by the current workforce and your current and future needs.

Gaps exist for those competencies where the rating in the “Currently Required” column and/or the “Required in the Future” column is greater than the rating in the “Competency Possessed” column. The results can be summarized in the [Competency Gap Assessment Form](#).

The important lesson to be learned from the Gap Analysis Competency Assessment is that simply having all of your jobs filled isn’t enough. They have to be filled by employees who exhibit the necessary competencies. And in many cases, current employees do not fully meet all of the competency requirements. This is critically important information to have in designing your Gap-Closing Strategies.



Competency Gap Assessment Form

Competency	Definition	Current Gap	Future Gap
Action Oriented	Consistently maintains high levels of activity or productivity; sustains long working hours when necessary, works with vigor, effectiveness and determination over a sustained period.		
Adaptability (Do not use with Facilitating Change)	Adapts well to changes in assignments and priorities; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; approaches change positively and adjusts behaviors accordingly.		
Applied Learning (Do not use with Continuous Learning and Professional Development)	Able to learn and properly apply new job-related information in a timely manner. Has the ability to absorb and comprehend job-related information from formal training and other formal and informal learning experiences.		
Building Trust	Interact with others in a way that gives them confidence in one's motives and representations and those of the organization. Is seen as direct and truthful; keeps confidences, promises, and commitments.		
Coaching	Providing timely guidance and feedback to help others strengthen knowledge/skills areas needed to accomplish a task or solve a problem.		
Collaboration	Builds constructive working relationships with clients/customers, other work units, community organizations and others to meet mutual goals and objectives. Behaves professionally and supportively when working with individuals from a variety of ethnic, social and educational backgrounds.		
Communication	Clearly conveys and receives information and ideas through a variety of media to individuals or groups in a manner that engages the listener, helps them understand and retain the message, and invites response and feedback. Keeps others informed as appropriate. Demonstrates good written, oral, and listening skills		
Conflict Management	Uses appropriate interpersonal styles and techniques to reduce tension and/or conflict between two or more people; able to size up situations quickly; able to identify common interests; facilitates resolution.		

Competency	Definition	Current Gap	Future Gap
Continuous Learning and Professional Development (Do not use with Applied Learning)	Is committed to developing professionally, attends professional conferences, focuses on best practices, values cutting-edge practices and approaches; takes advantage of a variety of learning activities, introduces newly gained knowledge and skills on the job.		
Cultural Competence	Cultivates opportunities through diverse people; respects and relates well to people from varied backgrounds, understands diverse worldviews, and is sensitive to group differences; sees diversity as an opportunity, challenges bias and intolerance.		
Customer/Client Focus	Makes customers/clients and their needs a primary focus of one's actions; shows interest in and understanding of the needs and expectations of internal and external customers (including direct reports); gains customer trust and respect; meets or exceeds customer expectations		
Decision Making/Problem Solving	Breaks down problems into components and recognizes interrelationships; makes sound, well-informed, and objective decisions. Compares data, information, and input from a variety of sources to draw conclusions; takes action that is consistent with available facts, constraints, and probable consequences.		
Delegating Responsibility	Comfortably delegates responsibilities, tasks, and decisions; appropriately trusts others to perform; provides support without removing responsibility.		
Developing Others (non-supervisory relationship; supervisors use Guiding and Developing Staff)	Helps plan and supports the development of individuals' skills and abilities so that they can fulfill current of future job/role responsibilities more effectively.		
Facilitating Change (Do not use with Adaptability)	Facilitates the implementation and acceptance of change within the workplace; encourages others to seek opportunities for different and innovative approaches to addressing problems and opportunities.		
Follow-up	Monitors the work of direct reports to insure quality standards and thoroughness; considers the knowledge, experience, and skill of staff members when determining extent of review.		
Formal Presentation Skills	Effectively presents ideas, information and materials to individuals and groups. Effectively prepares and provides structured delivery; facilitates workshops or meetings in a structured manner, can facilitate and manage group process.		

Competency	Definition	Current Gap	Future Gap
Guiding and Developing Staff (supervisory competency: non-supervisors use Developing Others)	Focuses and guiding others in accomplishing work objectives; rewards and recognizes others, both formally and informally, in ways that motivate them. Sets high performance expectations for team members; sets clear performance expectations and objectives; holds others accountable for achieving results. Successfully finds resources, training, tools, etc. to support staff needs. Works with staff to create developmental opportunities to expand knowledge and skill level; provides effective feedback and guidance for career development.		
Influence	Uses appropriate interpersonal skills and techniques to gain acceptance for ideas or solutions. Uses influencing strategies to gain genuine agreements; Seeks to persuade rather than force solutions or impose decisions or regulations.		
Initiative	Takes action without being asked or required to; achieves goals beyond job requirements; being proactive; taking prompt action to accomplish objectives.		
Innovation	Uses creativity and imagination to develop new insights into situations and applies new solutions to problems. Comes up with new and unique ideas.		
Managing Work (supervisory competency: non-supervisors use Planning and Organizing)	Shows ability to plan, schedule, direct work of self and others; balances task requirements and individual abilities; organizes materials to accomplish tasks; sets challenging yet achievable goals for self and others.		
Negotiation	Effectively exploring alternatives and positions to reach agreements and solutions that gain the support and acceptance of all parties.		
Planning and Organizing (non-supervisory competency: supervisors use Managing Work)	Organizes work, sets priorities, and determines resources requirements; determines necessary sequence of activities needed to achieve goals.		
Quality Orientation	Monitors and checks work to meet quality standards; demonstrates a high level of care and thoroughness; checks work to ensure completeness and accuracy.		
Risk Taking	Seeks opportunities and calculates risks to accomplish results that can lead to substantial benefit knowing the real possibility of significant negative consequences.		

Competency	Definition	Current Gap	Future Gap
Safety Awareness	Being aware of conditions and circumstances that affect one's own safety or the safety of direct reports.		
Strategic Focus	Understands how an organization must change in light of internal and external trends and influences; keeps the big, long range picture in mind; builds a shared long-range organizational vision with others. Committed to course of action to achieve long-range goals and influences others to translate vision into action.		
Stress Tolerance	Maintains effective performance under pressure; handling stress in a manner that is acceptable to others and to the organization.		
Team Leadership (supervisory competency: non-supervisors use Teamwork)	Communicates a vision and inspires motivation; engages with others (direct-reports and peers) in team process to solve problems; works to find a win/win resolution of differences; is aware of how management style impacts staff productivity and development; modifies leadership style to meet situational requirements; helps team stay focused on major goals while managing within a context of multiple directives.		
Teamwork (non-supervisory competency: supervisors use Team Leadership)	Participates as an active and contributing member of a team to achieve team goals. Works cooperatively with other team members, involves others, shares information as appropriate, and shares credit for team accomplishments.		
Technical/ Professional Knowledge and Skills	Possesses, acquires, and maintains the technical/professional expertise required to do the job effectively and to create client/customer solutions. Technical/professional expertise is demonstrated through problem solving, applying professional judgment, and competent performance.		
Visionary Leadership	Keeps the organization's mission, vision, and values at the forefront of employee decision making and actions; ensures alignment of organization's strategic plan and agency practices with vision, mission and values.		
Work Standards	Sets high standards and well-defined, realistic goals for one's self; displays a high level of effort and commitment towards completing assignments in a timely manner; works with minimal supervisor; is motivated to achieve.		

Case Study: Progressive County Department of Children Services

Overview

For the past several months, the Progressive County Department of Children's Services (PCDCS) has been engaged in a strategic planning process, and the leadership team has come to recognize the critical role the workforce will play in the agency's ability to achieve its strategic outcomes. As part of the strategic plan, PCDCS will be implementing the Family to Family (F2F) model next year. The new model has implications for both the number of frontline workers needed to do the job and the competencies that the workers must possess.

The leadership team has made the decision that workforce planning is critical to their overall strategic planning effort, and they have appointed a Workforce Planning Team (WPT), chaired by the Human Resources Director. The WPT is currently conducting the [Supply/Demand Analysis](#) and [Gap Analysis](#).

One of the WPT's major concerns is whether the current workforce will be able to adapt to the new service delivery model. Some of their Child Welfare Caseworkers are a poor fit for the current job, morale has been low, and turnover has been high. They are very concerned about how well the staff will be able to adapt to the new model.

Their analysis will include:

- A Competency Assessment to determine what competencies will be needed under the new F2F model.
- A Staffing Assessment to determine the numbers of staff needed under the new F2F model.
- Identifying the gaps between the competencies needed and those currently possessed by staff, and gaps between current and future staffing levels.

Profile: Progressive County Department of Children Services

- **Workforce Planning Initiative:** Family to Family
- **Workforce Planning Time Period:** 2 years
- **Workforce Concerns:** poor job fit, low morale, high turnover, adapting to new delivery model
- **Targeted Job Classification:** Child Welfare Caseworker
- **Number of Budgeted Child Welfare Caseworkers:** 100
- **Number of Current Vacancies:** 5
- **Total Cases:** 2,200
- **Caseload Ratio:** 22:1 for the past few years
- **Projected Caseload Growth:** 220 next year
- **Budgetary Goal:** 10 additional positions in next year's budget
- **Program Goal:** reduce caseload ratio to 18:1

Demand Analysis: Competency Assessment

PCDCS decided to begin their Demand Analysis by looking at the competencies staff will need to perform successfully under the new model. They selected a focus group from their best frontline supervisors and Child Welfare Caseworkers. The focus group facilitator used the following instructions and rating scale to complete the Competency Assessment:

Competency Rating Instructions:

Competencies are: the knowledge, skill, behaviors, personal attributes, or other characteristics associated with or predictive of superior job performance.

For each of the listed competencies, and in the appropriate column, indicate the degree to which the competency is:

- **Currently possessed** by the employees in the classification,
- **Currently required** to accomplish the work of the classification,
- **Will be required in the future** based upon the organization's strategic plan or changing business requirements.

Use the **Competency Rating Scale:**

- 0 – Competency is Not Required
- 1 – Basic Level of Competency
- 2 – Intermediate Level of Competency
- 3 – Advanced Level of Competency

The focus group reached consensus on the Competency Assessment (see the [Competency Menu Rating Form](#) on the next page). The competencies they expected would be important under the F2F model are shown in the last column, "Required in Future."

Competency Menu Rating Form

Competency	Competency Definition	Currently Possessed	Currently Required	Required in Future
Decision Making/Problem Solving	Breaks down problems into components and recognizes interrelationships; makes sound, well-informed, and objective decisions. Compares data, information, and input from a variety of sources to draw conclusions; takes action that is consistent with available facts, constraints, and probable consequences.	2	3	3
Communication	Clearly conveys and receives information and ideas through a variety of media to individuals or groups in a manner that engages the listener, helps them understand and retain the message, and invites response and feedback. Keeps others informed as appropriate. Demonstrates good written, oral, and listening skills	1	3	3
Planning and Organizing (non-supervisory competency: supervisors use Managing Work)	Organizes work, sets priorities, and determines resources requirements; determines necessary sequence of activities needed to achieve goals.	2	3	3
Adaptability (Do not use with Facilitating Change)	Adapts well to changes in assignments and priorities; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; approaches change positively and adjusts behaviors accordingly.	1	3	3
Conflict Management	Uses appropriate interpersonal styles and techniques to reduce tension and/or conflict between two or more people; able to size up situations quickly; able to identify common interests; facilitates resolution.	3	3	3
Collaboration	Builds constructive working relationships with clients/customers, other work units, community organizations and others to meet mutual goals and objectives. Behaves professionally and supportively when working with individuals from a variety of ethnic, social and educational backgrounds.	1	2	3

Competency	Competency Definition	Currently Possessed	Currently Required	Required in Future
Customer/Client Focus	Makes customers/clients and their needs a primary focus of one's actions; shows interest in and understanding of the needs and expectations of internal and external customers (including direct reports); gains customer trust and respect; meets or exceeds customer expectations	2	3	3
Work Standards	Sets high standards and well-defined, realistic goals for one's self; displays a high level of effort and commitment towards completing assignments in a timely manner; works with minimal supervisor; is motivated to achieve.	3	3	3
Initiative	Takes action without being asked or required to; achieves goals beyond job requirements; being proactive; taking prompt action to accomplish objectives.	2	2	3
Teamwork (non-supervisory competency: supervisors use Team Leadership)	Participates as an active and contributing member of a team to achieve team goals. Works cooperatively with other team members, involves others, shares information as appropriate, and shares credit for team accomplishments.	2	2	3
Technical/ Professional Knowledge and Skills	Possesses, acquires, and maintains the technical/professional expertise required to do the job effectively and to create client/customer solutions. Technical/professional expertise is demonstrated through problem solving, applying professional judgment, and competent performance.	3	3	3

[Demand Analysis: Staffing Assessment](#)

The WPT has also started gathering data for the Staffing Assessment portion of the Demand Analysis. The County's budget process determines the available dollars for staffing more than a year in advance, and the budget is set by the County Board. Although PCDCS realizes that the new program initiative must be implemented within existing resources, they must begin planning now for the budget that will go into effect during the fiscal year after next.

PCDCS has already completed a [SWOT Analysis](#), where they collected the following information:

- Currently, PDCDS serves approximately 2,200 cases, and employs 100 Child Welfare Caseworkers, having maintained a caseload ratio of 22:1 for the past few years.
- Earlier in the planning process, PCDCS decided they will need to create 5 new Team Decision-Making Facilitator positions when they implement the F2F program
- The Team Decision-Making Facilitator positions will have to come out of their allocation of the 100 Child Welfare Caseworkers.
- The State Legislature will require all counties to contract for “transporter services” for children in foster care.
- The dollars to pay for that contract will have to come from the line item that funds the Caseworker positions – further reducing the number of Caseworkers.
- PCDCS has projected a caseload growth of 220 cases over the coming year, and the County Board took that into account when setting next year’s budget.
- They intended to maintain the 22:1 caseload ratio by including funding for 10 additional positions in next year’s budget.
- PCDCS administrators, along with a number of key supporters, have already begun a campaign to convince the County Board that the caseload ratio should be reduced to 18:1 for the next budget cycle. Because of the publicity surrounding two recent high-profile cases, the Board appears to be very supportive of the proposal.

Based on this information, the Human Resources Manager completed the [Workload Change Worksheet](#) and the [Workload Change Summary Worksheet](#), and shared them with the WPT.

Workload Change Worksheet

Classification: *Child Welfare Caseworker*

Description of Policy Change/New Initiative	Effective Date
<i>Implementation of Family to Family initiative</i>	<i>One year from now</i>
	<input checked="" type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)	
<i>The new F2F model will require us to establish 5 new Team Decision-Making Facilitator positions that will have to come out of the Child Welfare Caseworker allocation of budgeted positions. Next year's budget has already been passed by the Board, so an increase in staffing is not possible.</i>	
Anticipated Changes in Staffing	
Increase in FTEs: _____ positions	Projected Effective Date:
Decrease in FTEs: 5 positions	Projected Effective Date: <i>One Year from now</i>

Description of Mandated Regulatory Change	Effective Date
<i>The State legislature has required all counties to contract for "transporter" services to transport children to visitations, medical appointments, etc. We must use the funding from 3 caseworker positions to pay for the contract.</i>	<i>One year from now</i>
	<input checked="" type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)	
<i>We believe the workload of the caseworkers will be reduced because they will be relieved of the time-consuming burden of transporting children and supervising visitations.</i>	
Anticipated Changes in Staffing	
Increase in FTEs: _____ positions	Projected Effective Date:
Decrease in FTEs: 3 positions	Projected Effective Date: <i>One year from now</i>

Workload Change Worksheet

Classification: *Child Welfare Caseworker*

Description of Planned Growth/Expansion		Effective Date
<i>We expect our client caseload to increase by approximately 220 cases. The Board has authorized hiring 10 more workers to maintain the 22:1 caseload ratio.</i>		<i>One year from now</i>
		<input checked="" type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
No change to workload		
Anticipated Changes in Staffing		
Increase in FTEs: <i>10</i> positions	Projected Effective Date: <i>One year from now</i>	
Decrease in FTEs: _____ positions	Projected Effective Date:	

Description of Other Factors Affecting Staffing		Effective Date
<i>We are proposing a change in the budget in the fiscal year after next. We are advocating for a reduction in the caseload from 22:1 to 18:1</i>		<i>One year from now</i>
		<input checked="" type="checkbox"/> Firm or <input type="checkbox"/> Projected
Likely Impact on Workload (e.g., increase/decrease in tasks, volume/quantity, response time)		
<i>We believe reducing the caseload ratio will have a significant impact on making workloads more manageable.</i>		
Anticipated Changes in Staffing		
Increase in FTEs: <i>33</i> positions	Projected Effective Date: <i>Two years from now</i>	
Decrease in FTEs: _____ positions	Projected Effective Date:	

Workload Change Summary Worksheet

Classification: *Child Welfare Caseworker*

Effective Date: *One year from now*

Workload Change Factors	Staffing Increase	Staffing Decrease
Policy Change/New Initiative		5
Mandated Regulatory Changes		3
Planned Growth/Expansion	10	
Other Factors Affecting Staffing		
TOTALS	10	8
Net Change	2	

Classification: *Child Welfare Caseworker*

Effective Date: *Two years from now*

Workload Change Factors	Staffing Increase	Staffing Decrease
Policy Change/New Initiative		
Mandated Regulatory Changes		
Planned Growth/Expansion		
Other Factors Affecting Staffing	33	
TOTALS	33	0
Net Change	33	

Supply Analysis – Staffing Assessment

The PCDCS has not kept detailed turnover reports in the past. However, they can use their HR data system to produce detailed reports showing employee departures from a job classification by reason (e.g., Retirement, Resignation, Promotion, etc). A HR analyst has developed a series of reports that show the number of departures, by departure reason, for each of the past three years. The analyst used that data to calculate the percentage of employees leaving the Child Welfare Caseworker classification for each of the past three years by departure code.

Using the [Attrition Projection Worksheets](#) below, the analyst estimated the number of employees projected to leave the Child Welfare Caseworker classification in each of the next two years. Columns 4 and 6 show the projected attrition based solely on the trend data:

Attrition Projection Worksheet

Classification: Child Welfare Caseworker								
Date: Now								
Column Numbers	1	2	3	4	5	6	7	8
Reason for Attrition	Average Percentage Attrition (Trend)	Current Number in Class	Projected Average Attrition	Attrition Adjustment (Year One)	Total Projected Attrition (Year One)	Attrition Adjustment (Year Two)	Total Projected Attrition (Year Two)	Total Projected Attrition (Both Years)
Retirements	0.0%	100	0	3	3	3	3	6
Resignations	15.0%	100	15	0	15	0	15	30
Terminations	2.0%	100	2	0	2	0	2	4
Promotions	1.0%	100	1	2	3	3	4	7
Demotions	1.0%	100	1	0	1	0	1	2
Transfers	0.0%	100	0	0	0	0	0	0
Other	0.0%	100	0	0	0	0	0	0
Total Attrition/ Turnover	19.0%	100	19	5	24	6	25	49

The WPT also looked at a number of other reports that provided useful demographic data and other information about the workforce. It became very obvious that PCDCS has an aging workforce. Most notably, 7 of the 100 Child Welfare Caseworkers at PCDCS are currently eligible for retirement. Eight more becomes eligible during the next two years. Even more Casework Supervisors are eligible fore retirement – of these fifteen frontline supervisors, six are eligible now, and five more become eligible during the next two years.

The HR Manager surveyed all of the retirement-eligible staff throughout the Department about the likelihood of retiring within the next three years. Based on the results, the WPT made adjustments to the trend analysis, as shown in columns 5 and 7 of the [Attrition Projection Worksheet](#). In the first-year projection, they adjusted the number of projected promotions based on the survey responses from supervisors (column 4). In the second year, they adjusted both the retirement and promotion-trend estimates based on the survey information (column 6).

Gap Analysis – Staffing Assessment

The PCDCS is using their Workforce Planning process to forecast their needs two years into the future. The [Gap Analysis: Staffing Assessment Template](#) shows their projections for the first year of their planning process:

- They have budgetary authorization to fill 100 Child Welfare Caseworker positions.
- Five of the positions are vacant – not unusual given their annual turnover rate.
- The increase of 2 positions comes from the [Workload Change Summary Worksheet](#).
- The projected attrition of 24 positions comes from the [Attrition Projection Worksheet](#).

The Gap Analysis shows that they need to add 31 employees during the course of the first year of the Workforce Planning process.

Gap Analysis: Staffing Assessment Template

Classification: Child Welfare Caseworker

Projected Date: Beginning One Year Out

Projected Required Staffing Level *(From Demand Analysis)*

Current staffing level in the target job classification Date: _____ <u>Now</u> _____		-		95	
Current Vacancies (+) / Overage (-) in target job classification		-		+5	
	And		And		
Increase / Decrease in number of positions from current staffing level		-		+2	
	Required Staffing Level	=		102	
(Current staffing level + or – projected changes)					

Projected Internal Supply *(From Supply Analysis)*

Current staffing level in the target job classification Date: _____ <u>Now</u> _____		-		95	
Projected attrition		-		24	
		=		71	
Internal Supply (Current staffing level – outflow + inflow)					

Required Staffing Level – Internal Supply = Gap

Projected Date *One Year Out*

31

The [Staffing Assessment Template](#) shows the team's projections for the second year of the Workforce Planning process:

- The current staffing level is 95 filled positions and 5 vacancies.
- They have 2 additional positions – a result of the net gain from the staffing adjustments intended to address the increasing client base.
- The increase of 33 positions comes from the [Workload Change Summary Worksheet](#) for the second year.
- These 33 positions should be included in the forecast because the County must gear up to fill them during the end of the second year, even though the budget to support them won't be available until the first day of the fiscal year that begins two years from now.
- From the [Attrition Projection Worksheet](#) for the second year, the first year's attrition is added to the second year's to obtain the projected 2-year attrition of 49 frontline workers.

The Gap Analysis shows that they need to add a total of 89 employees over the course of the full two years of the Workforce Planning process.

Gap Analysis: Staffing Assessment Template

Classification: Child Welfare Caseworker

Projected Date: Two Years Out

Projected Required Staffing Level *(From Demand Analysis)*

Current staffing level in the target job classification Date: _____ <u>Now</u> _____		95	
Current Vacancies (+) / Overage (-) in target job classification	-	+5	
Staffing allocation changes from first year of planning process	+	+2	
Increase / Decrease in number of positions from last years staffing level	-	+33	
	+		
Required Staffing Level (Current staffing level + or – projected changes)	=		135

Projected Internal Supply *(From Supply Analysis)*

Current staffing level in the target job classification Date: _____ <u>Now</u> _____		95	
Projected attrition	-	49	
Internal Supply	=		46

Required Staffing Level – Internal Supply = Gap

Projected Date: *Two Years Out*

89

The multi-year [Gap Analysis Summary](#) below shows that PCDCS must add 31 employees during the first year and 58 employees during the second year to “stay on track.”

Multi-Year Gap Analysis Summary

Classification: Child Welfare Caseworker

Dates: Now to Two Years Out

Two-Year Gap Dates: Now to Two Years Out		89
First-Year Gap Dates: Now to One Year Out	–	31
Second-Year Gap Dates: One year out to Two Years Out	=	58

The major issue identified in the Gap Analysis is that PCDCS will have 33 new positions that will become available all at once at the beginning of the fiscal year two years from now. Their Gap-Closing Strategies will need to begin well in advance if they intend to stay ahead of the curve. The Gap Analysis also makes it abundantly clear that continuously carrying 5 vacancies prevents them from operating at full capacity.

In summary, the Gap Analysis shows that PCDCS should:

- Make a concerted effort to fill the 5 vacancies they have been carrying along with the projected 2 to 4 vacancies that will result from attrition during the hiring process. They now recognize the importance of achieving full staffing before they can shift to the maintenance mode.
- Be prepared to hire about 2 caseworkers each month to cover the expected attrition of 21 employees during the first year.
- Be prepared to hire the 2 additional caseworkers that will become available with the new budget allocation recognizing the increased demand for services.
- Be prepared to hire approximately 2 caseworkers each month to cover the expected attrition of 23 employees during the second year.
- Be prepared to recruit and hire an additional 33 employees that will be authorized in the budget at the beginning of the fiscal year after next. They know this will be a huge challenge that will require considerable planning.

Gap Analysis – Competency Assessment

In reviewing the *Competency-Gap Analysis Worksheet* below, the Workforce Planning Team sees that gaps exist in eight of the competencies considered important for the Child Welfare Caseworker to possess under the Family to Family model. In fact, gaps exist in six of the eight same competency areas that are deemed to be critical to the job as the county currently expects it to be performed. Three of the competency areas, (*Communication, Adaptability, and Collaboration*) show two-point gaps between the competency levels currently possessed and needed for the future. The planning team sees this as a critical issue, particularly given plans to implement the new program model.

Competency-Gap Analysis Worksheet

Competency	Competency Definition	Current Gap	Future Gap
Decision Making/Problem Solving	Breaks down problems into components and recognizes interrelationships; makes sound, well-informed, and objective decisions. Compares data, information, and input from a variety of sources to draw conclusions; takes action that is consistent with available facts, constraints, and probable consequences.	1	1
Communication	Clearly conveys and receives information and ideas through a variety of media to individuals or groups in a manner that engages the listener, helps them understand and retain the message, and invites response and feedback. Keeps others informed as appropriate. Demonstrates good written, oral, and listening skills	2	2
Planning and Organizing (non-supervisory competency: supervisors use Managing Work)	Organizes work, sets priorities, and determines resources requirements; determines necessary sequence of activities needed to achieve goals.	1	1
Adaptability (Do not use with Facilitating Change)	Adapts well to changes in assignments and priorities; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; approaches change positively and adjusts behaviors accordingly.	2	2
Conflict Management	Uses appropriate interpersonal styles and techniques to reduce tension and/or conflict between two or more people; able to size up situations quickly; able to identify common interests; facilitates resolution.		
Collaboration	Builds constructive working relationships with clients/customers, other work units, community organizations and others to meet mutual goals and objectives. Behaves professionally and supportively when working with individuals from a variety of ethnic, social and educational backgrounds.	1	2

Competency	Competency Definition	Current Gap	Future Gap
Customer/Client Focus	Makes customers/clients and their needs a primary focus of one's actions; shows interest in and understanding of the needs and expectations of internal and external customers (including direct reports); gains customer trust and respect; meets or exceeds customer expectations	1	1
Work Standards	Sets high standards and well-defined, realistic goals for one's self; displays a high level of effort and commitment towards completing assignments in a timely manner; works with minimal supervisor; is motivated to achieve.		
Initiative	Takes action without being asked or required to; achieves goals beyond job requirements; being proactive; taking prompt action to accomplish objectives.		1
Teamwork (non-supervisory competency: supervisors use Team Leadership)	Participates as an active and contributing member of a team to achieve team goals. Works cooperatively with other team members, involves others, shares information as appropriate, and shares credit for team accomplishments.		1
Technical/ Professional Knowledge and Skills	Possesses, acquires, and maintains the technical/professional expertise required to do the job effectively and to create client/customer solutions. Technical/professional expertise is demonstrated through problem solving, applying professional judgment, and competent performance.		

The WPT has gathered a wealth of information, thoroughly analyzed workforce data, and shared their findings with the leadership team. PCDCS is well prepared to begin the process of identifying the Gap-Closing strategies that will help them meet tomorrow's challenges.