

# Workforce Development Planning and Assessment Tool Kit

## **Facilitator's Guide**

# Acknowledgments

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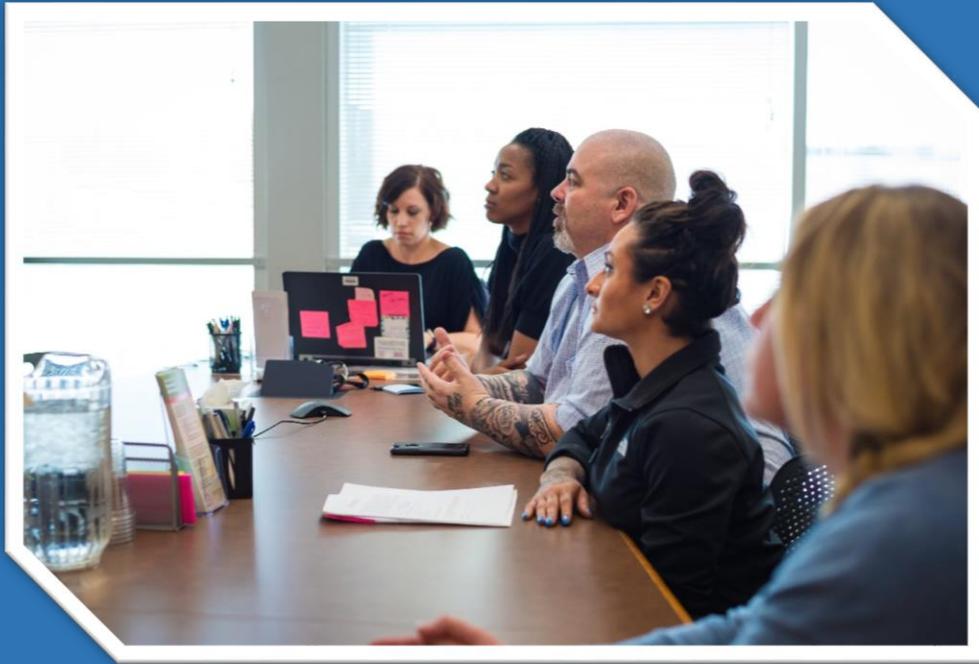
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# Chapter I

# INTRODUCTION



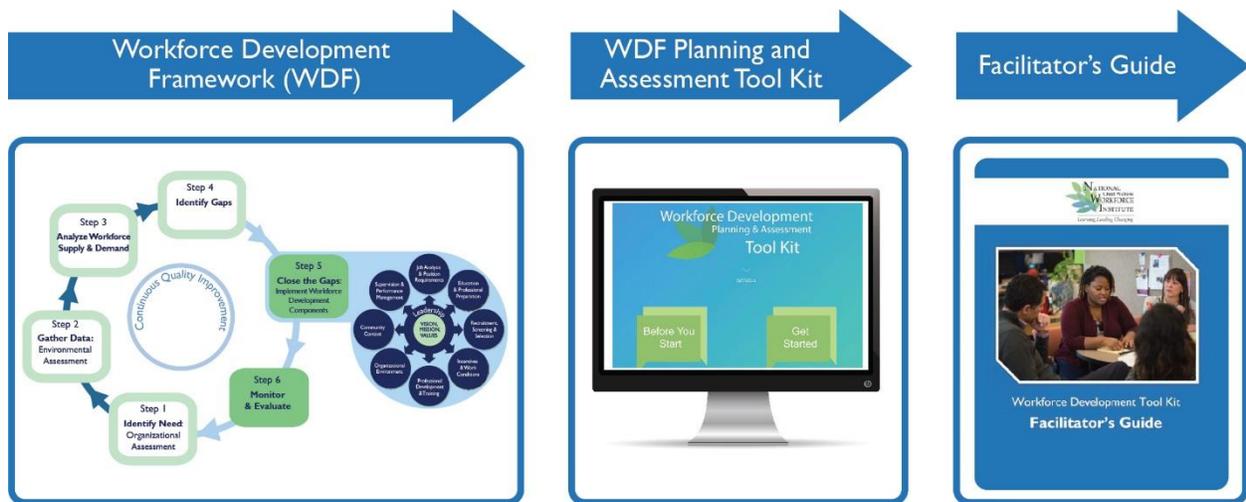
## WORKFORCE DEVELOPMENT PLANNING AND ASSESSMENT TOOL KIT FACILITATOR'S GUIDE

# Introduction

Purpose: Introduce the Workforce Development Planning and Assessment Tool Kit

**Welcome** to the Workforce Development Planning and Assessment Tool Kit Facilitator’s Guide. The Guide supports the implementation of NCWWI’s Workforce Development Planning and Assessment Tool Kit and Workforce Development Framework. These three resources work collectively to lead your agency’s workforce planning and assessment process in a comprehensive way, resulting in workforce improvements that in turn will lead to better outcomes for children, youth, and families.

The Key, Interconnected Documents Are



The  **Workforce Development Framework** (WDF), developed by NCWWI in 2015, grew out of a comprehensive review of the workforce development literature across multiple professions in the public and private sectors. The WDF helps child welfare leaders understand best and promising workforce practices for developing and supporting a competent, committed, and diverse workforce, as well as an inclusive and welcoming workplace.

The **Workforce Development Planning and Assessment Tool Kit** (Tool Kit), <http://wdftoolkit.ncwwi.org/index.html>, a companion resource to the WDF, applies the WDF to an

agency setting and offers a practical, comprehensive, and integrated road map for workforce development.

The **Workforce Development Tool Kit Facilitator’s Guide** (Guide) is a step-by-step implementation of Tool Kit activities over a period of typically 3–12 months when first applying the process. Since this process repeats over time and staff master it, subsequent cycles may require less time. This Guide provides a sequential process for using team meetings to move through the Tool Kit. The Guide offers possible meeting agendas, suggested activities, talking points, and Tool Kit worksheets that accompany each stage and step in the workforce development process. The process can be broken into stages with corresponding steps, as seen in table 1.

Table 1. Workforce Development Tool Kit stages

Stage I	Stage II	Stage III	Stage IV	Stage V
Getting Ready	Planning	Exploring Components and Strategies	Action Planning	Monitoring and Evaluation

### As the Team Moves Through the Process, Consider the Following

- The Tool Kit first guides the workforce development team through a series of steps in a continuous quality improvement planning process. The team will reflect on specific questions and gather information about the agency, its organizational and community context, and factors impacting workforce strengths and challenges.
- Next, the Tool Kit directs the workforce development team to explore the ten distinct components of workforce development and consider strategies that might be appropriate for the agency.
- The team also examines the overall resource costs, agency capacity, and leadership commitment associated with specific strategies within the Workforce Development Components.
- This information contributes to development of the agency’s Workforce Development Action Plan.
- Expect to repeat this cycle in subsequent years to continue the agency’s focus on workforce development.

## Why the Workforce Matters

Access NCWWI's compelling infographic for *Why the Workforce Matters*.

Download the infographic, "Why the Workforce Matters," to provide a succinct and compelling visual to connote your agency's commitment to the workforce.

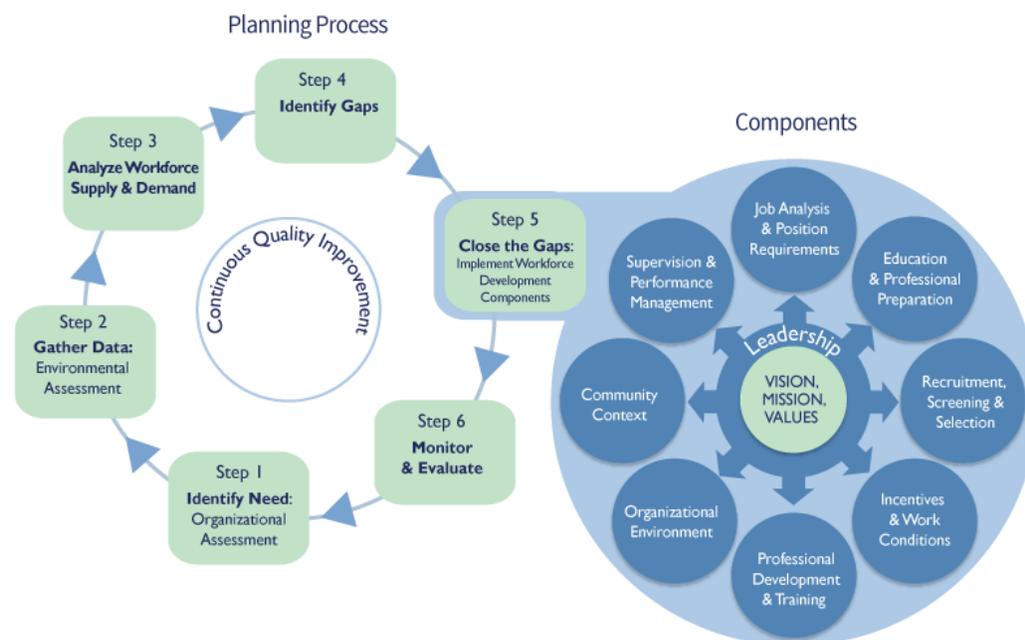
High staff turnover and unprepared staff are costly, as noted in the infographic. More importantly, turnover and inexperienced staff adversely impact outcomes for children, youth, and families.

Workforce diversity can also affect retention and long-term outcomes. Research has demonstrated the impact of workplace diversity and inclusivity on organizational commitment, job satisfaction, intent to stay, and turnover (Hwang and Hopkins, 2015; Brimhall, Lizano, and Mor Barak, 2014). Agencies must create a welcoming and inclusive culture and climate where staff experience mutual trust and respect and perceive themselves to be a valued part of the organization (Leake, Rienks, and Obermann 2017).



## The NCWWI Workforce Development Framework

The graphic below depicts NCWWI's Workforce Development Framework and illustrates how an agency moves through the workforce development planning and assessment process.



The  **Workforce Development Framework (WDF)** links a thoughtful and intentional team-based workforce development planning process with that of selecting and implementing specific workforce development strategies intended to “close the gaps” between the agency’s current workforce and anticipated future workforce needs.

A comprehensive and integrated approach—considering “the big picture” before moving forward with specific strategies—will increase the likelihood that the strategies selected are in fact best suited to the unique workforce challenges within the agency and its external environment.

## Using the Workforce Development Tool Kit Facilitator’s Guide

Like workforce development itself, the planning and assessment process is complex, multifaceted, and ongoing. It may be challenging for an agency to know where and how to start. This Guide will provide the necessary background information, steps, support materials, and supplemental information to steer the team through the process successfully.

This structured workforce development process will result in an action plan that, when fully implemented, will make a difference in your agency’s workforce. However, workforce development is not static. You will need to revise the process and your plan as appropriate in response to shifting work challenges and changing agency priorities. Most importantly, this is a continuous quality improvement process requiring commitment and steadfast leadership support.

The next chapter, “Getting Ready” provides information on how to start the process at your agency.

# Chapter 2

## GETTING READY



# Getting Ready

## Purpose: Prepare for the Process of Implementing the Tool Kit

Congratulations! You and your agency are ready to undertake the important endeavor of cultivating and retaining your workforce. This chapter will provide guidance on how to begin the process of implementing the Tool Kit and understanding and addressing workforce issues at your agency.

## Overview of the Workforce Development Planning and Assessment Process

Implementation of the Workforce Development Planning and Assessment Tool Kit occurs in stages and steps that enable the agency to complete a thorough and objective workforce development process over time. The duration of each stage and the number of meetings needed to accomplish the work will vary for individual agencies. Take the time to fully explore each stage, analyzing the data and coming to consensus about conclusions. See the summary handouts at the end of this chapter for a visual overview of the process.

### Planning Stage

Meetings required: 2–4

The workforce development team should first engage in Steps 1–4 of the workforce development planning process (the left side of the graphic) to gather information and consider its importance and significance related to the workforce needs of the agency.

### Exploring Components and Strategies Stage

Meetings required: 2–4

In this stage, the team reviews the *components* that are critical for workforce development and completes a series of assessments focused on these distinct, but interrelated, components. The team explores and discusses potential strategies intended to help “close the gap” between the agency’s current and future workforce.

### “Putting It All Together” Stage

Action planning during this stage includes both short- and long-term strategies, with timelines ranging

from several weeks or months to a full year. Of course, complex strategies, such as ones that require legislative changes, have a significant fiscal impact or require negotiation with external partners, which will need additional planning, extended timelines, and greater stakeholder involvement. The action plan should reflect tasks and activities that can be reasonably completed within 12 months while longer-term plans can be incremental, take into account barriers and challenges, and allow for developmental implementation and plan modifications.

## Time Frames for the Workforce Development Planning and Assessment Process

Workforce development stages of *planning, assessment, intervention, and monitoring* usually occur over a period of 6 to 9 months, as table 2 below suggests, with as few as 3 to as many as 10–12 meetings. Hold meetings as frequently as necessary to keep momentum moving forward while accomplishing the goals of each stage.

Table 2. Workforce development planning and assessment time frame

Stage	Getting Ready	Planning Stage	Exploring Components and Strategies Stage	Action Planning Stage	Monitoring and Evaluation Stage
Time Frame	Month 1	Months 2–3	Months 4–5	Month 6	Month 7 and beyond
Meetings	1	2, 3, 4	5, 6, 7	8, 9	9–12+

*Note: This is a general outline. Customize the number of meetings to match your agency’s needs and available time. For example, instead of holding four separate meetings, condense them into a day-long event. Content for each meeting would then be covered within a condensed time frame.*

## The Workforce Development Team

A comprehensive workforce development process requires an engaging team of diverse members from all agency levels committed to workforce development, starting with an enthusiastic commitment and ongoing support from the agency’s executive management. A strong workforce development team distributes the activities, gathers the necessary information, offers multiple perspectives, assumes responsibility for implementation, and monitors and evaluates the impact. Team members also share and receive information from peers and colleagues, communicating vertically—up and down the supervisory and reporting chain—as well as horizontally across the agency and with community partners and stakeholders.

Team sizes should range from 12–25 members, depending upon the size of the agency. There should be sufficient agency representatives and people-power to do the work, but not be so large that members do not feel needed and disengage.

For more information about building a strong team, [click here](#)



#### Sample Team Composition:

- Agency administrators
- Middle manager
- Supervisors representing units across the agency
- Frontline staff representing units across the agency
- Case aides/clerical staff
- HR representative
- Union representative
- Communication or public information representative
- University partner (as appropriate)
- Provider partner (as appropriate)
- Family partner (as appropriate)
- Youth leader partner (as appropriate)

Typically, members of the team will rotate roles of leader(s)/facilitator(s) and schedule meetings, work with team members to develop the agenda for each meeting, assign responsibilities or tasks, and develop timelines for action planning. Another person should take on the role of notetaker. Team members share responsibilities and hold one another mutually accountable for moving forward. Naturally, members will cycle on and off the team so prepare an onboarding process for new members.



Workforce development efforts are most successful when accomplished by a committed team with shared goals and clarity of intent, supported by a strong commitment from the agency's leadership team.

## Roles and Responsibilities of Workforce Group Members

### Group Facilitator (this role can be rotated or split among team members)

- Act as champion for the process
- Organize meeting locations
- Send out invitations
- Gather pre-meeting materials (or assign this function)
- Develop agendas

- Make copies of documents as appropriate
- Facilitate meeting to achieve meeting goals
- Ensure meeting notes are taken
- Disseminate notes
- Onboard new members as appropriate

#### **Meeting Notetaker (this role can be rotated)**

- Take meeting notes
- Distinguish action items
- Clean up notes as appropriate
- Send notes to meeting facilitator for distribution

#### **Workforce Development Team Member**

- Commit to attending all meetings for the first year
- Act as ambassador about the effort across the agency
- Prepare for all meetings by reviewing background material and meeting notes
- Participate in meetings
- Offer constructive feedback and observations
- Assist with action items

### Before the First Meeting

All workforce development team members should do the following:

1. Watch the webinar about the Workforce Development Framework:  
<https://vimeo.com/204187313> (full length is 59:50)
2. Review the WDF brief  
[http://ncwwi.org/files/NCWWI\\_Workforce\\_Development\\_Framework\\_Overview.pdf](http://ncwwi.org/files/NCWWI_Workforce_Development_Framework_Overview.pdf)
3. Gather appropriate background material
4. Be ready to get engaged!

### Sample Invite

Use the sample invite below or craft one of your own for the initial meeting.

Dear Colleague,

We know the workforce matters and that's why we want you to help develop a comprehensive plan to address our agency's workforce issues. Workforce issues range from how we hire people, prepare them for the work, offer supervision to them, and create a positive organizational culture that will keep our staff at our agency. We are adopting the National Child Welfare Workforce Institute's approach to guide our workforce development efforts.

Please join us on XX, X, 20XX, for our kickoff meeting [insert time and location here]. We expect to have between 3 and 12 meetings over the next year to assess what is happening with our workforce and develop and implement a plan to address the issues we determine are necessary. As appropriate, we ask that you prepare for the meetings by reading background material or watching videos that are shared with you.

This effort is an investment in our workforce and we hope you will be part of this important endeavor. If you have any questions, please contact me at [insert here]. Please RSVP to this invitation if you'd like to join our group. Thank you in advance for helping to develop and sustain our workforce.

## Summary Handouts

These handouts can be found in the Workforce Development Tool Kit and provide guidance for the workforce development planning process.

QUICK GUIDE: OVERVIEW OF STEPS 1-4		Workforce Development Assessment Tool Kit
Step in the Workforce Planning Process	Information Gathered (Inputs)	Knowledge Gained (Outputs)
<b>Step 1</b> Identify Need: Organizational Assessment	<ul style="list-style-type: none"> <li>Mission &amp; Vision Statements</li> <li>Core values assessment</li> <li>Strategic plan, program evaluations or legislative needs</li> <li>Needs-based grants, proposals, TV, Webinars</li> </ul>	<ul style="list-style-type: none"> <li>Relevant information about current programs &amp; emerging changes impacting agency structure</li> </ul>
<b>Step 2</b> Gather Data: Environmental Assessment	<ul style="list-style-type: none"> <li>Assessment of agency culture &amp; climate</li> <li>Job satisfaction, HR exit interviews</li> <li>Funding sources &amp; resources</li> <li>Legislative &amp; public changes</li> <li>Characteristics of community &amp; demographics</li> <li>Emerging trends in demographics, immigration, net migration (inflow or outflow?)</li> </ul>	<ul style="list-style-type: none"> <li>Factors impacting agency culture/ climate or staff morale</li> <li>Social trends &amp; issues impacting community</li> <li>Economic conditions impacting labor pool &amp; workforce</li> <li>Industry &amp; generational skills impacting agency &amp; community</li> </ul>
<b>Step 3</b> Analyze Workforce Supply & Demand	<ul style="list-style-type: none"> <li>Supply</li> <li>Workforce levels</li> <li>Demographic Information</li> <li>Hiring &amp; turnover trends</li> <li>Forecast</li> <li>Agency programs: In budget plans</li> <li>Analysis of needs, skills, knowledge &amp; competencies</li> </ul>	<ul style="list-style-type: none"> <li>Current workforce profile (number of staff, roles, educational level, skill assessment, qualifications, tenure, supervisory roles, diversity)</li> <li>Turnover/predictions (retirement, retirement rates, replacement patterns)</li> <li>Workforce skills inventory</li> <li>Future workforce profile (types of jobs needed, number of staff needed &amp; needed skills &amp; competencies needed)</li> <li>Impact of technological advancements on future workforce</li> <li>Overall workforce strengths</li> <li>Overall workforce challenges in gaps</li> </ul>
<b>Step 4</b> Identify Workforce Gaps	<ul style="list-style-type: none"> <li>Information Gathered and Summarized at Step 2: Organizational Assessment</li> <li>Step 2: Environmental Assessment</li> <li>Step 3: Environmental Assessment</li> <li>Step 3: Workforce Supply &amp; Demand</li> </ul>	<ul style="list-style-type: none"> <li>Overall workforce strengths</li> <li>Overall workforce challenges in gaps</li> </ul>

**OUTCOME:** A Snapshot of Your Agency's Workforce Planning & Assessment Results

### Quick Guide: Overview of Steps 1-4



**QUICK GUIDE:**  
EXPLORING THE WORKFORCE DEVELOPMENT COMPONENTS: WHERE DO WE BEGIN?

The examples of factors that may be contributing to the gap are not intended to be exhaustive, nor are the ratings "prescriptive." Rather they are intended to help your team make informed decisions about where to begin your exploration of the components. If each step is rated a 4 or higher, select a few, beginning with those reflecting the most consensus among team members. Remember, your team should eventually explore all of the components. These are just a guide to get you started.

**If Step 1: Identify Need** suggests that any of the following factors are contributing to the workforce gap:

- Alignment of the agency's current or anticipated direction of programs with its vision, mission, and values
- Anticipated changes in programs and direction of strategic planning
- Current and emerging demographic trends or program enrollment in SACWIS or other PPS data that will impact programs
- Changes in leadership and/or organizational restructuring

**AND/OR**

- You rated the importance/efficacy of the information collected in this step as 4 or higher.

**If Step 2: Gather Data** suggests that any of the following factors are contributing to the workforce gap:

- Agency culture and climate and staff morale
- Budget conditions and funding levels
- Legislative changes and departmental initiatives

**Then...** begin by exploring the following Workforce Development Component(s):

**Worksheet D: Vision, Mission, Values.** Examine this component and consider strategies to align the agency's vision, mission, and values with current or anticipated programs.

**Worksheet E: Leadership.** Examine this component and explore leaders' level of preparation and areas for professional development needed to create an inclusive culture and lead a diverse workforce.

**Worksheet C: Job Analysis & Position Requirements and Worksheet G: Professional Development & Training.** Examine these components and consider what areas of knowledge and skills are needed for recruit and prepare staff to deliver effective services.

**Then...** begin by exploring the following Workforce Development Component(s):

**Worksheet F: Incentives & Work Conditions and Worksheet H: Organizational Environment.** Examine these components and consider internal and external factors that may be impacting the agency's organizational health and staff morale.

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## Quick Guide: Exploring the Workforce Development Components – Where do We Begin?

# Chapter 3

## PLANNING STAGE



# Steps 1–4: Planning Stage

## Purpose: Identify Current and Emerging Workforce Gaps

During this planning stage, the workforce development team will address the left side of the workforce development framework graphic to assess the agency’s context, emerging trends, and future workforce needs.

### Meeting: Kickoff

The purpose of this first meeting is to introduce the workforce development planning and assessment process, provide an opportunity for members to get to know each other, and help the team understand how to address the workforce issues in your agency.

A suggested annotated agenda\* for the meeting follows in table 3.

Table 3. Meeting: Kickoff

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Introduce all members. Establish team norms as appropriate. Conduct an introductory activity that focuses on the importance of an engaged and supported workforce.
9:15–9:45	Workforce Development Tool Kit	Review the graphic of the WDF and go through the planning and assessment steps in the Tool Kit. Refer to <b>Quick Guide: Overview of Steps 1–4</b> and explain how the process will unfold.
9:45–10:15	Team’s Role	Review the roles and expectations for the team. Discuss whether all appropriate stakeholders are represented on the current team. Set a schedule for regular meetings.
10:15–10:30	Current Context	Review basic information about your agency workforce, including demographic data and turnover data.
10:30–11:00	Next Steps	Debrief the meeting, asking questions such as: <ul style="list-style-type: none"><li>• What did we accomplish today?</li><li>• Were we inclusive?</li><li>• Did we pay attention to our process?</li><li>• What do we need to do differently or work on?</li></ul> Determine other data and information to be collected and make assignments. Before the next meeting, team members

should collect:

- Mission and vision statements
- Core values statement
- Strategic plan, program evaluations, or legislative audits,
- Newly funded grants, proposals, etc.

*\* Note, extend the meeting as necessary to cover all content.*

## Suggested Activities

### Introductory Activity

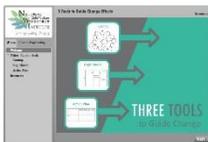
1. Conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “Right now, the workforce at our agency is known for \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### Team Norms

1. Ask participants for suggestions on group norms (e.g., we are respectful, we are inclusive, we pay attention to the process, we arrive at meetings on time, we turn off our cell phones).
2. Write suggestions on chart paper.
3. Generate consensus on the norms.
4. Commit to posting the group norms at each meeting.

### Micro Videos

1. As homework, assign the micro video or show during the meeting. Adjust meeting times accordingly.



## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

1. The workforce matters to this agency, and this effort invests in our most valuable resource.

- The value of our workforce is evidenced by our commitment to this process.
- We need staff at all levels from the agency as well as our community partners to effectively address workforce issues.
- We celebrate the strengths of our workforce right now and recognize there are areas for improvement.
- Throughout this process, we will make space to address issues of diversity, equity, and inclusion.
- The Workforce Development Tool Kit offers a structured process to first fully assess the agency's current workforce challenges and then to engage in a thorough and thoughtful planning process to implement strategies to support the development of our workforce for the future.

## Suggested Handouts

- Agenda
- **Workforce Development Framework (WDF) graphic**
- **Why the Workforce Matters Infographic**
- **Quick Guide: Overview of Steps 1-4**



QUICK GUIDE: OVERVIEW OF STEPS 1-4		North Carolina Department of Health & Human Services
Step in the Workforce Planning Process	Information Gathered (Inputs)	Knowledge Gained (Outputs)
<b>Step 1</b> Identify Need Organizational Assessment	<ul style="list-style-type: none"> <li>Assess if value proposition</li> <li>Current resources</li> <li>Strategy plan, program evaluation or legislative needs</li> <li>Worthy funded goals, programs, etc.</li> <li>Volunteers</li> </ul>	<ul style="list-style-type: none"> <li>Follow-up information about current program in relationship to long-term planning</li> <li>Identify agency direction</li> </ul>
<b>Step 2</b> Gather Data Formal/Informal Assessment	<ul style="list-style-type: none"> <li>Assessment of agency culture &amp; climate</li> <li>Job satisfaction, staff engagement</li> <li>Planning documents &amp; documents</li> <li>Feedback to public, change</li> <li>Characteristics of community &amp; demographics</li> <li>Emerging needs in emerging markets</li> <li>Emerging, unmet or unmet needs of community</li> </ul>	<ul style="list-style-type: none"> <li>Factors impacting agency culture change or performance</li> <li>Local trends &amp; future planning</li> <li>Community conditions impacting agency and its workforce</li> <li>Factors of government culture</li> <li>Identifying agency's capacity</li> </ul>
<b>Step 3</b> Analyze Workforce Supply & Demand	<ul style="list-style-type: none"> <li>SWOT</li> <li>Market trends</li> <li>Demographic information</li> <li>Identify key success factors</li> <li>Agency program in budget plan</li> <li>Analysis of skills needs &amp; competencies</li> <li>Analysis of needed skills, knowledge &amp; competencies</li> <li>Impact of technological advancements on skills needed</li> </ul>	<ul style="list-style-type: none"> <li>Current workforce profile (number of staff, salary information, level, skill acquisition, characteristics, terms, experience, turnover, etc.)</li> <li>Workforce supply/demand</li> <li>Workforce needs information</li> <li>Workforce skills inventory</li> <li>Emerging workforce types of skills needed to meet current &amp; anticipated needs</li> <li>Impact of technological advancements on skills needed</li> <li>Identify workforce strengths</li> <li>Unmet workforce challenges in gaps</li> </ul>
<b>Step 4</b> Identify Workforce Gaps	<ul style="list-style-type: none"> <li>Information gathered and formation of Step 1 Organizational Assessment</li> <li>Step 2 Organizational Assessment</li> <li>Step 3 Workforce Supply &amp; Demand</li> </ul>	<ul style="list-style-type: none"> <li>Unmet workforce challenges in gaps</li> </ul>

# Step 1: Identify Need

*Note, Steps 1 and 2 can be in one meeting or span two meetings. It is presented here as two separate meetings for clarity's sake. Modify the meeting schedule depending upon your agency's context and available time. For example, the meetings may require three hours instead of two to properly analyze all data and draw conclusions.*

For this meeting, gather the following documents.

- Mission and vision statements
- Core values statement
- Practice Model documents
- Strategic plan, program evaluations, or legislative audits
- Child and Family Services Review (CFSR) reports
- Program Improvement Plans (PIP)
- Newly funded grants, proposals, etc.



Assign responsibility for collecting the documents to various members of your team. It's also suggested that summaries of important points be provided rather than long documents. Instead, make the full documents available electronically.

A suggested annotated agenda for the second meeting follows in table 4.

Table 4. Meeting: Step 1, Identify Need: Organizational Assessment

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Introduce all members. Acknowledge new team members. Review team norms.
9:15–9:45	Agency Mission, Vision, and Values	Review the agency's mission, vision, and values. Conduct the "Who Knows Our Mission and/or Values by Heart" activity. <i>Note, agencies may or may not have defined values, if not, skip this aspect of the activity.</i> Record information on the worksheet, <b>Step 1 Worksheet, Identify Need: Organizational Assessment.</b>
9:45–10:15	Agency Strategic Plan and Upcoming Initiatives	Review the agency's strategic plan, program evaluations, legislative audits, etc. and upcoming initiatives. Keep this to a high-level discussion. Record information on <b>Step 1 Worksheet, Identify Need: Organizational Assessment</b> using the worksheet to guide the discussion.
10:15–10:45	Implications for Workforce Development	Use a liberating structure called 1-2-4-All to discuss the workforce implications (see suggested activities and the

		<p>Appendix). Use the questions from the “Summing It Up” section to guide the discussion.</p> <p>The questions on the worksheet are:</p> <ol style="list-style-type: none"> <li>1. What information is most useful to you?</li> <li>2. What does it tell you about your agency?</li> <li>3. What else do you need to know?</li> </ol> <p>Record ideas on the worksheet.</p>
10:45–10:50	Importance/Significance of Information	<p>Consider the importance and significance of this information. Ask participants to scale it from 1–5. Options for doing this include raising their hand and holding up the number of fingers to correspond to their opinion. Also, consider using a polling app such as PollEverywhere (see the Appendix for more information).</p>
10:50–11:00	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Determine other data and information to be collected for the next meeting and make assignments.</p> <ul style="list-style-type: none"> <li>• Agency assessments of culture and climate</li> <li>• Job satisfaction surveys and HR exit interviews</li> <li>• Funding increases and decreases</li> <li>• Anticipated legislative and policy changes</li> <li>• Characteristics of community and demographics</li> </ul> <p>Set next meeting date/time.</p>

## Suggested Activities

Sample activities and corresponding instructions for completing them are offered below.

### *Introductory Activity*

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### *Mission, Vision, and/or Values Statement Competition*

1. Ask all participants to turn over all material. Ask people to write down the agency mission on a piece of paper.
2. Ask for volunteers to read their agency mission (or go around the table).
3. Present the real agency mission and read it aloud.
4. Determine who got it right or was closest.
5. Award a prize.
6. Use the same approach with the agency's vision and/or values (so long as these have been previously defined by the agency). Ask them to write down all of the agency's values.
7. Determine who got this right.
8. Award a prize.

#### *Review Data Reports and Other Information*

1. Prior to the meeting, assign reports to various individuals to concisely summarize the information and prepare handouts for distribution.
2. Using an Ignite-like format, ask individuals to present their information. Typical Ignite talks are 5 minutes long and consist of 20 slides transitioning every 15 seconds. These presentations should only be about 2 minutes in length and slides are optional. The point of this to keep the information flowing and in a lively format. Information about Ignite can be found at: <http://www.ignitetalks.io/>.
3. Summarize the key points of these reports.

*1-2-4-All* (For more information on this liberating structure and others see:

<http://www.liberatingstructures.com/>)

1. Display the questions from “Summing It Up” on a PowerPoint slide that you create:
  - What information is most useful to you?
  - What does it tell you about your agency?
  - What else do you need to know?
2. Ask team members to silently self-reflect on what they just heard. What are the takeaways? Allow about a minute.
3. Partner up and generate ideas in pairs, building on ideas from the self-reflection. Allow 2–3 minutes.
4. Join another pair and share and develop ideas from your pair in foursomes (notice similarities and differences). Allow about 3–4 minutes.
5. Reconvene the group and ask, “What is one idea that stood out in your conversation?” Each group shares one important idea with all. Allow about 5–7 minutes.

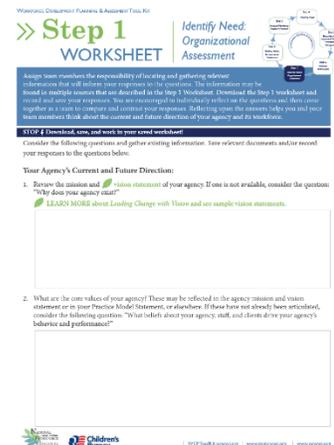
### Suggested Talking Points

Guide the meeting in the style best suited to you and your agency. Be sure to cover the following talking points:

1. All workforce efforts should be in service to the agency mission, vision, and values.
2. The approach we are taking to understanding our workforce is parallel to how we work with families. That is, before we jump in and start providing services, we carefully assess the context to understand each individual situation, and then craft a customized plan that will result in our desired outcomes.
3. The information we are reviewing provides contextual information about what is happening now and in the future, so we can base our plan not just on today but on what is expected to happen later.
4. We must consider how equity and inclusion are reflected in our agency's mission, vision, and values.
5. It's especially important to assess and monitor demographic data for equity in service delivery across key decision points on the child welfare continuum.
6. Rating the importance of this information through scaling will help us organize it to come to conclusions and guide the next steps.
7. We will combine this and future information from subsequent meetings to determine the agency's workforce gaps.

## Suggested Handouts:

- Agenda
- Summaries of key documents
- **Step 1 Worksheet, Identify Need: Organizational Assessment**



# Step 2: Gather Data

## Pre-Work

For this meeting, gather the following documents:

- Agency assessments of culture and climate
- Job satisfaction surveys and HR exit interviews
- Funding increases and decreases
- Anticipated legislative and policy changes
- Characteristics of community and demographics

Assign responsibility for collecting and summarizing the documents to the various members of the team. It's also suggested that full documents be available electronically.

Demographic information on your community can be found on local and state websites, as well as national repositories. Consult with stakeholders in the community about what they perceive are pressing issues. For example, a discussion with community members might yield significant information about an influx of a specific population that might need services of the child welfare workforce.

Check these sources:

### Your state's Department of Labor and Employment

For information about your state's workforce. Google, "[insert your state name, Department of Labor and Employment]". This website is typically on a state government site. The site offers information about your state's labor market, regulations, etc.

### National Labor Force Statistics—Demographics [<https://www.bls.gov/cps/demographics.htm>]

This website contains information about national labor force statistics with demographic characteristics available from the Current Population Survey (CPS). Data on the labor force characteristics of employed and unemployed persons, plus hours of work and earnings, also are available. This information may be helpful when determining salary ranges.

### Bureau of Labor Statistics: Occupational Handbook [<https://www.bls.gov/ooh/community-and-social-service/social-workers.htm>]

This website offers information about the occupation of social worker and relevant data such as median pay, entry level education requirements, number of jobs, anticipated growth rates, etc.



U.S. Census Bureau [<https://www.census.gov/>]

This website offers broad information about the U.S. society and economy and has a wide range of facts such as demographic characteristics of the state’s population, including age ranges, race, ethnicity, etc.

A suggested annotated agenda\* for the meeting follows in table 5.

Table 5. Meeting: Step 2, Gather Data

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Introduce all members. Acknowledge new team members.
9:15–9:45	Implications so Far	Review the implications from the last meeting.
9:45–10:15	Agency Assessment and Anticipated Changes	Review the agency culture and climate assessments, job satisfaction surveys, HR exit info, anticipated funding changes, legislative and policy changes, and your community’s demographics and characteristics. Consider using an Ignite-like approach to present this information (see suggested activities). Record information on the corresponding worksheet.
10:15–10:45	Implications for Workforce Development	Use a liberating structure called 1-2-4-All to discuss the workforce implications. Record ideas on a handout. Record information on the corresponding worksheet, <i>Step 2 Worksheet, Gather Data: Environmental Assessment</i> .
10:45–11:00	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Determine other data and information to be collected and make assignments.</p> <p>Set next meeting date/time.</p>

\* Extend the meeting as necessary to fully analyze and discuss implications of the data.

## Suggested Activities

Sample activities and corresponding instructions for completing them are offered below.

*Introductory Activity (if there are new team members)*

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_”

2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

1-2-4-All (For more information this liberating structure and others see:

<http://www.liberatingstructures.com/>)

1. Ask team members to silently self-reflect on what they just heard. What are your takeaways? Allow about a minute.
2. Partner up and generate ideas in pairs, building on ideas from the self-reflection. Allow 2–3 minutes.
3. Join another pair and share and develop ideas from your pair in foursomes (notice similarities and differences). Allow about 3–4 minutes.
4. Reconvene the group and ask, “What is one idea that stood out in your conversation?” Each group shares one important idea with all. Allow about 5–7 minutes.

Ask them to jot down ideas and think for a few moments about them individually. Then they should partner up and discuss in pairs. After a few minutes they should join with another pair and come to agreement on implications.

## Suggested Talking Points

By the conclusion of this meeting, the workforce team will have a clear picture of the current workforce situation and anticipated changes. Be sure to cover the following talking points:

1. We’ve spent a great deal of time understanding the agency context and will use this information to explore the components in Stage 2 of this process.
2. It is important to examine disaggregated data to see what different groups (e.g., gender, race, job, position, department) within the organization are experiencing. Generalized data can exclude the voices and experiences of diverse populations.
3. As we gather data, we will consider culturally responsive/appropriate research evaluation practices.
4. As a group, we need to consider how this information informs this agency’s workforce of the future.
5. We take the time to do this before making assumptions and jumping to conclusions.



## Suggested Handouts

- Agenda
- Summaries of key documents
- **Step 2 Worksheet: Gather Data: Environmental Assessment**

# Step 3: Analyze Workforce Supply and Demand

*Note, Steps 3 and 4 can be in one meeting or span two meetings. It is presented here as two separate meetings for clarity's sake. Modify the meeting schedule depending upon your agency's context and available time. Be sure to allow sufficient time to fully analyze and draw conclusions from the data.*



For this meeting, gather the following documents.

- Demographics of current staff
- Agency retention/turnover information, if possible by programs and units
- Caseload and workload data
- Staffing levels
- Agency strategic plan
- Newly funded grants, proposals, etc.

Assign responsibility for collecting the documents to various members of your team. It's also suggested that summaries of important points be provided rather than long documents. Instead, make the full documents available electronically.

A suggested annotated agenda\* for this meeting follows in table 6.

Table 6. Meeting: Step 3, Analyze Workforce Supply and Demand

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Introduce all members. Acknowledge new team members.
9:15–9:20	WDF Framework	<p>Orient the team to the current location on the WDF Framework graphic.</p> <p>Refer team members to <i>Step 3 Worksheet, Analyze Workforce Supply and Demand</i>.</p> <p>Assign a notetaker to record consensus information on the worksheet.</p>

9:20–9:50	Review Data	<p>Review the information gathered including</p> <ul style="list-style-type: none"> <li>• Demographics of current staff</li> <li>• Agency retention/turnover information</li> <li>• Caseload and workload data</li> <li>• Staffing levels</li> <li>• Agency strategic plan</li> <li>• Newly funded grants, proposals, etc.</li> </ul> <p>See activity options for how to do this in an expedient manner.</p>
9:50–10:05	Discussion on Future Impacts	<p>Conduct a discussion on the current and future activities that may impact the workload of your staff. Record information on the worksheet, <i>Step 3 Worksheet, Analyze Workforce Supply and Demand</i>, using it to guide the discussion. See the suggested activity options for how to conduct it with a liberating structure. Otherwise, conduct a group discussion.</p>
10:05–10:20	Discussion on Current and Future Workforce Demand	<p>Discuss the future demand. Divide the team into 5 small groups and assign them a grouping (from the worksheet):</p> <ul style="list-style-type: none"> <li>• By function (e.g., initial assessment or “intake” versus in-home staff)</li> <li>• By position (e.g., social workers/case managers, supervisors, MIS staff, etc.)</li> <li>• By location (e.g., by # of staff within a county or office, or within a region)</li> <li>• By needed core or advanced skills, knowledge, and competencies</li> <li>• By other characteristics such as language proficiency or education levels (e.g., languages spoken by families residing within or immigrating to the area, or # of staff trained in substance counseling and intervention)</li> </ul> <p>(Note delete any irrelevant groupings)</p> <p>Ask them to calculate numbers for each of these looking at current positions.</p> <p>Ask each group to present their forecast based upon the current supply and anticipated future needs.</p> <p>Ask the notetaker to record this information on the worksheet.</p>
10:20–10:40	Discussion on Race, Equity, and Inclusion	<p>Conduct a purposeful and initial discussion on race and equity related to workforce supply and demand. ** Ask:</p> <ul style="list-style-type: none"> <li>• Are our workforce demographics reflective of our community?</li> <li>• What issues of equity and inclusivity are reflected in our climate and culture assessments?</li> </ul>

		<ul style="list-style-type: none"> <li>• When we look at retention/turnover data, are we seeing any trends related to race/ethnicity?</li> <li>• What are the gaps?</li> <li>• What are our goals for diversity?</li> </ul>
10:40–10:50	Summing It Up	<p>Using the questions from the worksheet, sum up this discussion and ask the team:</p> <ul style="list-style-type: none"> <li>• What information is most useful to you?</li> <li>• What does it tell you about your agency?</li> <li>• What else do you need to know?</li> </ul> <p>The notetaker should record information on the worksheet.</p>
10:50–10:55	Importance/Significance of Information	<p>Consider the importance and significance of this information. Ask participants to scale it from 1–5. Options for doing this include raising their hand and holding up the number of fingers to correspond to their opinion. Also, consider using a polling app such as PollEverywhere.</p>
10:55–11:00	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Determine other data and information to be collected and make assignments as necessary (from the summing it up discussion).</p> <p>Set next meeting date/time.</p>

*\* Extend the meeting as necessary to fully analyze and discuss implications of the data.*

*\*\* Your agency may already have a committee or workgroup devoted to race, equity, and inclusion. If so, make sure they are included in this team and engaged in all aspects of the workforce planning process. Also, consider creating a subcommittee to focus specifically on issues of equity and inclusion to help keep the team accountable every step of the way.*

## Suggested Activities

Sample activities and corresponding instructions for completing them are offered below.

### Introductory Activity

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because

- \_\_\_\_\_”
2. Record responses on chart paper
  3. Refer back to these responses as appropriate during the meeting

### *Review Data*

1. Prior to the meeting, assign reports to various individuals to concisely summarize the information and prepare handouts for distribution.
2. Using an Ignite-like format, ask individuals to present their information. Typical Ignite talks are 5 minutes long and consist of 20 slides transitioning every 15 seconds. These presentations should only be about 2 minutes in length and slides are optional. The point of this to keep the information flowing and in a lively format. Information about Ignite can be found at: <http://www.ignitetalks.io/>.
3. Summarize the key points of these reports.

*1-2-4-All* (For more information on this liberating structure and others see: <http://www.liberatingstructures.com/>)

1. Display the questions from the worksheet on a PowerPoint slide:
  - What planned, current, and future activities may impact the workload of your staff or workforce needs? Be specific. Consider the alignment of your staff needs with your mission or vision.
2. Ask team members to silently self-reflect on what they just heard. What are the takeaways? Allow about a minute. Suggest they jot down notes on the worksheet.
3. Partner up and generate ideas in pairs, building on ideas from the self-reflection. Allow 2–3 minutes.
4. Join another pair and share and develop ideas from your pair in foursomes (notice similarities and differences). Allow about 3–4 minutes.
5. Reconvene the group and ask, “What is one idea that stood out in your conversation?” Each group shares one important idea with all. Allow about 5–7 minutes.

## Suggested Talking Points

Guide the meeting in the style best suited to you and your agency. Be sure to cover the following talking points:

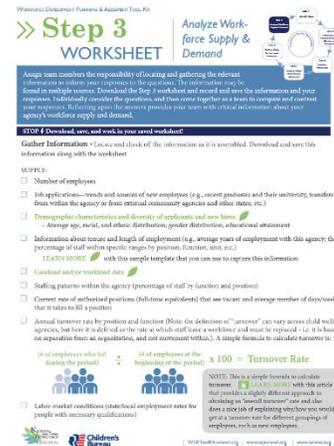
1. Analyzing the current workforce availability and future needs will help to determine the parameters for the agency’s workforce efforts.
2. We will combine this information with information from previous meetings to determine our workforce gaps.
3. Discussions of diversity, equity, and inclusion are an important part of this process.
4. The approach we are taking to understanding our workforce is parallel to how we work with families. That is, before we jump in and start providing services, we carefully assess the

context to understand each individual situation, and then craft a customized plan that will result in our desired outcomes.

5. Scaling this information will help us organize it to come to conclusions and guide the next steps.

## Suggested Handouts

- Agenda
- Summaries of key documents
- **Step 3 Worksheet, Analyze Workforce Supply and Demand**



# Step 4: Identify Gaps

Note, Steps 3 and 4 can be in one meeting or span two meetings. It is presented here as two separate meetings for clarity's sake. Modify the meeting schedule depending upon your agency's context and available time.

For this meeting, gather pertinent summaries from the previous meetings including all worksheets completed to date:

- **Step 1 Worksheet, Identify Need: Organizational Assessment**
- **Step 2 Worksheet, Gather Data: Environmental Assessment**
- **Step 3 Worksheet, Analyze Workforce Supply and Demand**



Note, this meeting only requires 90 minutes.

A suggested annotated agenda for this meeting follows in table 7.

Table 7. Meeting: Step 4, Identify Workforce Gaps

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Introduce all members. Acknowledge new team members.
9:15–9:20	WDF Framework	<p>Orient the team to the current location on the WDF Framework graphic.</p> <p>Refer team members to the <b>Step 4 Worksheet, Identify Workforce Gaps</b>.</p> <p>Assign a notetaker to record consensus information on the worksheet.</p>
9:20–9:35	Review Summarized Information	<p>Review the information gathered from:</p> <ul style="list-style-type: none"> <li>• Step 1: Organizational Assessment</li> <li>• Step 2: Environmental Assessment</li> <li>• Step 3: Workforce Supply and Demand</li> </ul> <p>See activity options for how to do this in an expedient manner.</p>
9:35–10:20	Discussion on Strengths and Challenges	Conduct a discussion on the agency's overall workforce strengths and challenges and gaps. Record information on

*Step 4 Worksheet, Identify Workforce Gaps*, using it to guide the discussion.

The questions on the worksheet are:

- What are your agency’s overall workforce strengths? Be specific. What characteristics of your agency and workforce are strengths? Do you anticipate that these strengths will continue into the future and contribute to an effective workforce?
- What are your agency’s workforce challenges and gaps? Be specific. Define the problem. Consider the root causes. What is your theory about the possible causes of these challenges or gaps? Do you anticipate these challenges will continue into the future and contribute to future workforce gaps?

See the suggested activity options for how to conduct this activity with a liberating structure. Otherwise, just conduct a group discussion, fully discussing each question. Be sure to target race and equity issues.

Ask the notetaker to take notes on the worksheet summarizing the discussion (remember this can be done electronically using the fillable form).

**10:20–10:30**

Next Steps

Debrief the meeting, asking questions such as:

- What did we accomplish today?
- Were we inclusive?
- Did we pay attention to our process?
- What do we need to do differently or work on?

Set or confirm the next meeting date and time.

## Suggested Activities

Sample activities and corresponding instructions for completing them are offered below.

### *Introductory Activity*

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_”

2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### *Review Worksheets*

1. Prior to the meeting, assign the worksheets to various individuals to concisely summarize the information.
2. Keep this activity moving, ask that presentations be kept to 3 minutes.
3. Summarize the key points of these worksheets.

### *Review Strengths and Challenges*

#### *Option 1:*

1-2-4-All (For more information on this liberating structure and others see:

<http://www.liberatingstructures.com/>)

1. Conduct Round 1: Display the questions from the worksheet on a PowerPoint slide:
  - What are your agency's overall workforce strengths? Be specific. What characteristics of your agency and workforce are strengths? Do you anticipate that these strengths will continue into the future and contribute to an effective workforce?
2. Ask team members to silently self-reflect on what they just heard. What are the takeaways? Allow about a minute. Suggest they jot down notes on the worksheet.
3. Partner up and generate ideas in pairs, building on ideas from the self-reflection. Allow 2–3 minutes.
4. Join another pair and share and develop ideas from your pair in foursomes (notice similarities and differences). Allow about 3–4 minutes.
5. Reconvene the group and ask, "What are our workforce strengths?" Each group shares their top strengths and avoids duplicating previous groups. Allow about 5–7 minutes.
6. Conduct Round 2 using the same process, this time responding to the question (on a PowerPoint slide as well):
  - What are your agency's workforce challenges and gaps? Be specific. Define the problem. Consider the root causes. What is your theory about the possible causes of these particular challenges or gaps? Do you anticipate these challenges will continue into the future and contribute to future workforce gaps?
7. Move through the self-reflection, partners, and foursomes as before.
8. Reconvene the group and ask, "What were your main challenges?" Each group shares their top findings, not repeating any previous groups. Focus on the theories about what caused each of the challenges. Allow about 5–7 minutes.
9. Summarize the strengths and challenges.

#### *Option 2:*

1. Divide team members into small groups.
2. Ask them to discuss the questions on Worksheet 4.

3. Allow about 25 minutes for discussion.
4. Reconvene the group and ask each group to report out. Be sure to ask them to avoid repeating ideas already covered.
5. Ask the notetaker to record information on the “master” Worksheet 4.
- 6.

## Suggested Talking Points

As previously stated, guide the meeting in the style best suited to you and your agency. Be sure to cover the following talking points:

1. To identify workforce gaps, compare the available workforce resources (supply) with needed resources (demand) for the agency’s workforce of the future.
2. This information provides a snapshot of the critical factors affecting the workforce and the characteristics of the agency and community that impact the agency’s workforce supply and demand.
3. This step points out racial or ethnic disparities or underrepresented social identity groups in the composition of our workforce. Analyzing the disparities in the data with the experiences of our workforce and the community is critical, especially for those in underrepresented groups.
4. The result of the rigorous and thoughtful process results in identifying the *workforce gaps*.
5. At the next meeting, the team will begin to prioritize and consider an array of workforce strategies *to close the gaps*.

## Suggested Handouts

- Agenda
- Summaries of key documents
- **Step 4 Worksheet, Analyze Workforce Gaps**

As before, a team’s ability to move forward can sometimes be delayed while waiting for “one last piece” of information. It’s important to balance the desire for more information with the importance of moving forward to complete and implement the priorities in the agency’s action plan. Flexibility is key to revisit the action plan along the way and accommodate necessary adjustments.



# Chapter 4

## COMPONENTS AND STRATEGIES



# Step 5: Close the Gaps

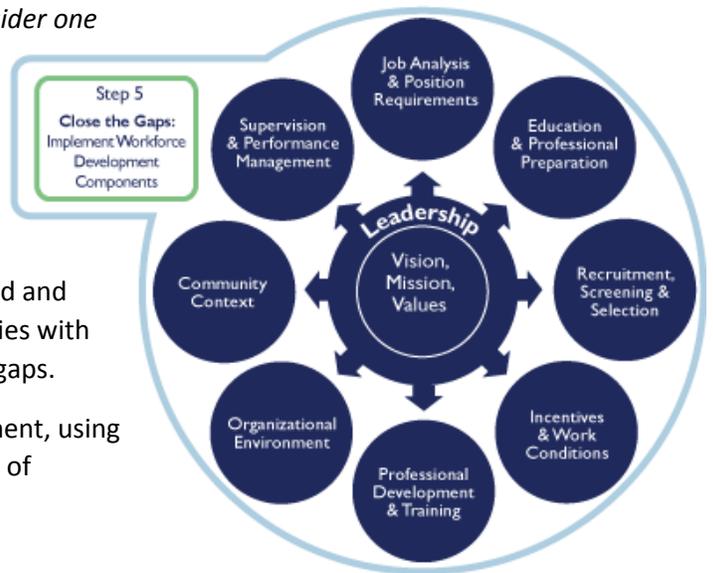
Purpose: Identify Strategies to Close Workforce Gaps

*Note, Step 5 can be three meetings. Alternatively, consider one full-day meeting to combine all three meetings into a single day.*

During this stage, the workforce development team develops strategies to address workforce gaps in a holistic action plan.

At this juncture, all the information previously collected and analyzed is used to select the components and strategies with the most potential for closing the agency’s workforce gaps.

Now is when the team will really dig into each component, using the assigned ratings to consider and prioritize an array of strategies.



Activity options are presented for moving through each meeting. Each workforce development team should engage in a facilitated process that makes the most sense for their agency and context.

The workforce development team now dives into workforce development components and strategies to address the agency’s workforce gaps. The first meeting prepares for subsequent meetings by determining the areas to focus on.

A suggested annotated agenda\* for the meeting follows in table 8.

Table 8. Meeting: Laying the Groundwork for Closing the Gaps (Step 5)

TIMES	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:15	Introductions	Conduct introductions as necessary.

9:15–9:20	Workforce Development Framework	<p>Orient team to their current location in the workforce process. Put up the graphic of the WDF and point to the current step.</p> <p>Refer to <i>Quick Guide: Exploring the Workforce Development Components: Where Do We Begin?</i></p>
9:20–9:40	Review Step 1: Identify Need	<p>Review the basic information collected during Step 1: Identify Need. Ask for volunteers to summarize the following:</p> <ul style="list-style-type: none"> <li>• Alignment of the agency’s current or anticipated direction of programs with its vision, mission, and values.</li> <li>• Anticipated changes in programs and direction of strategic planning.</li> <li>• Current and emerging demographic trends or patterns reflected in SACWIS or other MIS data that will impact programs.</li> <li>• Changes in leadership and/or organizational restructuring.</li> </ul> <p>Ask the team if any of these items were rated as a 4 for importance or significance. Put those items on a chart paper, labeled “Significant Issues.”</p>
9:40–10:00	Review Step 2: Gather Data	<p>Review the data collected in Step 2 to determine if any of the following contributed to the workforce gap:</p> <ul style="list-style-type: none"> <li>• Agency culture and climate and staff morale.</li> <li>• Budget conditions and funding levels.</li> <li>• Legislative changes and departmental initiatives.</li> <li>• Community demographics and characteristics and state/county/community demographic forecast.</li> <li>• Unique or emerging demographic trends; immigration patterns, influx of retirees, net migration patterns.</li> <li>• Social trends: health, mental health, substance abuse.</li> </ul> <p>Ask the team if any of these items were rated as a 4 for importance or significance. Put those items on a chart paper, labeled “Significant Issues.”</p>
10:00–10:20	Review Step 3: Analyze Workforce Supply and Demand	<p>Review the data collected in Step 3 to determine if any of the following contributed to the workforce gap:</p> <p><i>Supply</i></p> <ul style="list-style-type: none"> <li>• Number and source of new employees.</li> <li>• Demographic characteristics and diversity of applicants and new hires.</li> </ul>

		<ul style="list-style-type: none"> <li>• Staffing patterns and caseload/workload.</li> <li>• Retention and turnover data.</li> </ul> <p><i>Demand</i></p> <ul style="list-style-type: none"> <li>• Overall number, type, characteristics, and skills of staff based upon current supply and anticipated future needs, including program direction, budget plans, and diversity of workforce.</li> </ul>
<b>10:20–10:45</b>	Considering Diversity	<p>Conduct a discussion to look at these issues through a diversity, race, and equity lens. Ask the following questions to generate discussion that should be considered for future decision-making:</p> <ul style="list-style-type: none"> <li>• What would it look like if our approach to workforce development fully attended to issues of diversity, race, and equity?</li> <li>• What is particularly important to keep in mind as we move forward?</li> <li>• For those items rated as significant/important, what diversity, race, equity issues should be considered?</li> </ul> <p>Recognize that much more time could and should be devoted to this topic. Sum up this discussion and remind team members to keep this in mind moving forward.</p>
<b>10:45–11:00</b>	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Review the list for items rated as 4 or higher, match those items to the corresponding Workforce Development components. See table 9 for the corresponding factors and worksheets.</p>

\* Extend the meeting as necessary to fully analyze and discuss the components.

Table 9. Significant needs and the corresponding worksheets

<b>STEP</b>	<b>CORRESPONDING WORKSHEET</b>
<b>STEP 1: IDENTIFY NEED</b>	Worksheet A: Vision, Mission, Values Worksheet B: Leadership Worksheet G: Professional Development and Training
<b>STEP 2: GATHER DATA</b>	Worksheet F: Incentives and Work Conditions Worksheet H: Organizational Environment Worksheet I: Community Context

Worksheet J: Supervision and Performance Management

**STEP 3: ANALYZE WORKFORCE  
SUPPLY AND DEMAND**

Worksheet C: Job Analysis and Position Requirements  
Worksheet D: Education and Professional Preparation  
Worksheet E: Recruitment, Screening, and Selection



Type up the “Significant Issues” list to make available for the next meeting.

## Suggested Activities

### *Introductory Activity*

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### *Closing Activity*

1. Go to the chart paper labeled “Significant Issues” and write the corresponding worksheet title on the chart paper.
2. Ask participants to pull these worksheets for the next meeting (or section) and begin to consider them.

## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

1. Much information has been gathered for this team to make informed decisions.
2. The process continues a deliberate and thoughtful approach guided by facts.
3. This is intended to be a holistic approach. That said, some issues will and should rise to the top.
4. We will continue to use a diversity, race, and equity lens as we explore and prioritize the components and move to action planning. A focus on diversity, race, and equity will always be front and center because it is central to a stronger agency.

5. By committing to address issues of diversity, race, and equity, the team commits to “practicing what they preach” and knowing that the process will affect outcome.
6. Time for inquiry and dialogue about the process is made in each step as a way to model for the agency and build organizational capacity.
7. Components will have different levels of importance to achieve results.
8. Eventually, the team will explore ALL the workforce development components because a single component or strategy is rarely, if ever, sufficient to address workforce challenges.

## Suggested Handouts and Resources

- Agenda
- ***.Quick Guide: Exploring the Workforce Development Components: Where Do We Begin?***

Workforce Development  
Planning Process  
Tool Kit

**QUICK GUIDE:**  
EXPLORING THE WORKFORCE DEVELOPMENT  
COMPONENTS: WHERE DO WE BEGIN?

The examples of factors that may be contributing to the gap are not intended to be exhaustive, nor are the ratings “prescriptive.” Rather they are intended to help your team make informed decisions about where to begin your exploration of the components. If each step is rated a 4 or higher, select a line beginning with those reflecting the most consensus among team members. Remember, your team should eventually explore all of the components. These are just a guide to get you started.

<p><b>If Step 1: Identify Need</b> suggests that any of the following factors are contributing to the workforce gap:</p> <ul style="list-style-type: none"> <li>➤ Alignment of the agency's current or anticipated direction of programs with its vision, mission, and values</li> <li>➤ Anticipated changes in programs and direction of strategic planning</li> <li>➤ Current and emerging demographic trends or patterns reflected in SACWIS or other PEP data that will impact programs</li> <li>➤ Change in leadership and/or organizational restructuring</li> </ul> <p><b>AND/OR</b></p> <ul style="list-style-type: none"> <li>➤ You rated the importance/significance of the information collected in this step as 4 or higher.</li> </ul>	<p><b>Then...</b> begin by exploring the following Workforce Development Component(s):</p> <p><b>Worksheet A: Vision, Mission, Values.</b> Examine this component and consider strategies to align the agency's vision, mission and values with current or anticipated programs.</p> <p><b>Worksheet B: Leadership.</b> Examine this component and explore leaders' level of preparation and areas for professional development needed to create an inclusive culture and lead a diverse workforce.</p> <p><b>Worksheet C: Job Analysis &amp; Position Requirements and Worksheet G: Professional Development &amp; Training.</b> Examine these components and consider what areas of knowledge and skills are needed to recruit and prepare staff to deliver effective services.</p>
<p><b>If Step 2: Gather Data</b> suggests that any of the following factors are contributing to the workforce gap:</p> <ul style="list-style-type: none"> <li>➤ Agency culture and climate and staff morale</li> <li>➤ Budget conditions and funding levels</li> <li>➤ Legislative changes and departmental initiatives</li> </ul>	<p><b>Then...</b> begin by exploring the following Workforce Development Component(s):</p> <p><b>Worksheet F: Incentives &amp; Work Conditions and Worksheet H: Organizational Environment.</b> Examine these components and consider internal and external factors that may be impacting the agency's organizational health and staff morale.</p>

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## Exploring and Rating Each Component

During this meeting, the team will carefully consider each of the components to determine how to address the workforce gaps. This meeting explores and rates each component.

A suggested annotated agenda\* for the meeting follows in table 10.

Table 10. Meeting: Exploring and Rating Each Component

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:05	Introductions	Conduct introductions as necessary.
9:05–9:25	Review Significant Issues	<p>Orient the team to Step 5 of the Workforce Planning and Assessment Tool Kit. Review the significant issues determined at the last meeting.</p> <p>Briefly review the definition of each component found on the Quick Guide.</p> <p>Refer to <i>Quick Guide: Exploring the Workforce Development Components: Where Do We Begin? Significant Issues</i> (typed up from last meeting) <b>Worksheets A–J</b> (to match the significant issues)</p>
9:25–10:30	Explore and Rate Components	<p>Conduct an activity to have the team rate each of the components that correspond to the significant issues. Choose one of the approaches from the suggested activities below.</p> <p>Refer the team to corresponding worksheet for each component. Explain that this activity focuses on Question #1, “How well is your agency doing in this area?” The next meeting will address Question #2, “What strategies should your agency consider to strengthen this component?” Encourage discussion about each component when rating the individual indicators.</p>
10:30–10:45	Summarize Ratings	Tally up the ratings (based upon the chosen activity) and rank order the components (as appropriate).
10:45–11:00	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Determine next steps, including assigning homework as appropriate. Consider divvying up the components to small work groups or individuals and ask them to explore the NCWWI website for a range of additional strategies, resources, and tools and bring those back to the next meeting.</p>

*\* Extend the meeting as necessary to fully discuss the components.*

## Suggested Activities

### *Option 1: Conversation Café Activity*

This activity works well for larger groups.

1. Place chart paper and markers at each table so there are enough tables (or stations) for each of the 10 components to be discussed. If necessary, split up the components into different groups, assigning multiple components to a table or group. Label the chart papers with the name of the component(s) to be discussed at that table.
2. Ask for volunteers to “host” a table (or station). Each host will stay at the table while the participants will move approximately every 10 minutes. Let participants know this will be an opportunity for everyone to give their input about the targeted components and to think about the root causes that impact this component.
3. Refer all participants to their worksheets. Explain that the focus will be on Question #1, “How well is your agency doing in this area?”
4. Ask participants to move to a table or station so they are evenly spread out (put these instructions on chart paper or on a slide and display at the front of the room). The table host should commence the discussion and keep notes.
  - a. Review the desired outcomes for each component.
  - b. Discuss issues of diversity, race, and equity relevant to each component.
  - c. Discuss root causes that contribute to performance on the indicators.
  - d. Review the indicators on each worksheet. Encourage discussion about these indicators as well as others.
  - e. Through consensus, rate each indicator and make any other notes. Ask participants to rate the indicators as either 1 = Poor; 2 = Fair; 3 = Good.
  - f. Use the chart paper to jot down key points, draw pictures, etc.
  - g. Table hosts assemble the rating and key points.
5. Ring a chime or call time after about 10 minutes (monitor the groups and adjust time accordingly) and ask participants to move to another table or station. The table hosts stay and convey the previous group’s discussion. Table hosts repeat the process and collect new ratings for this group.
6. Repeat this process as long as time allows.
7. Convene the large group and ask each table host to report out the main points and rankings. Record rankings on a master worksheet.
8. Tally up the rankings and rank order in terms of areas needing most attention to the least. Recognize that there may be many ties.

### *Option 2: Group Discussion and Polling*

This option works well for smaller groups.

1. Refer all participants to their worksheets. Explain that the focus will be on Question #1, “How well is your agency doing in this area?”
2. Conduct a group discussion covering the following:
  - a. Review the desired outcomes or conditions for each component.
  - b. Review the indicators on each worksheet. Encourage discussion about these indicators as well as others.
  - c. Discuss issues of diversity, race, and equity relevant to each component.
  - d. Discuss root causes that contribute to performance on the indicators.
3. Write key points on chart paper.
4. Review each indicator and ask participants to rate the indicators as either 1 = Poor; 2 = Fair; 3 = Good. This can be done by having participants hold up the corresponding number of fingers or using a polling application like PollEverywhere (if this is used, the polling questions will need to be inserted prior to the meeting). Record ratings on a master worksheet.
5. Repeat the process for each of the significant components.
6. Tally up the rankings and rank order in terms of areas needing most attention to the least. Recognize that there may be many ties.

## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

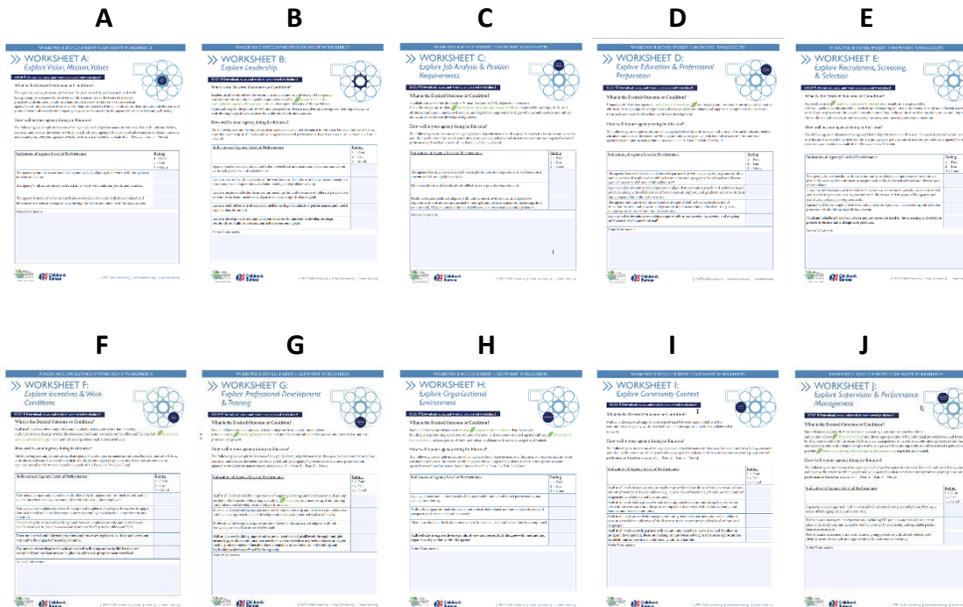
1. Through this process, we can now understand the agency’s significant workforce issues.
2. Carefully analyze each workforce component based upon sample indicators of an agency’s performance in each area.
3. The intent of today’s meeting is to understand the agency’s level of performance for each component and understand the root causes leading to that performance.
4. As a team, we are attending to issues of diversity, equity, and inclusion by using the indicators included in the component worksheets.
5. Each agency is unique; if the indicators are not applicable to our agency, we encourage dialogue about other indicators that may be more important or significant.
6. Today’s meeting allows everyone the opportunity to provide input about the components impacting the agency’s workforce in order to close the gaps. This input will continue with the selection of strategies or interventions to address these issues.

## Suggested Handouts

- Agenda
- **Workforce Development Framework (WDF) graphic**
- **Quick Guide: Exploring the Workforce Development Components: Where Do We Begin?**



- **Significant Issues** (typed up from last meeting)
- **Worksheets A–J** (to match the significant issues – hyperlinked below)



## Exploring Strategies for Each Component

The workforce development team has carefully assessed the workforce landscape at the agency and now is ready to start exploring the strategies. The team knows the priorities to focus on. This meeting explores the strategies of the components that will close the workforce gaps.

A suggested annotated agenda\* for the meeting follows in table 11.

Table 11. Meeting: Exploring Strategies for Each Component

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:05	Introductions	Conduct introductions as necessary.
9:05–9:15	Review Ratings and Rankings for Each Component	Orient the team to Step 5 of the Workforce Development Tool Kit. Review the key points from the rankings and ratings for each component. Refer to <b>Quick Guide: Exploring the Workforce Development Components: Where Do We Begin? Significant Issues</b> (typed up from last meeting) <b>Worksheets I–J</b> (to match the significant issues)
9:15–10:30	Explore Strategies for Each Component	Conduct an activity to have the team explore strategies relevant to each of the components corresponding to the significant issues. Choose one of the approaches from the suggested activities list below.

		Refer the team to the corresponding worksheet for each component. Explain that this activity focuses on Question #2, “What strategies should your agency consider to strengthen this component?” Encourage discussion about each component when rating the individual indicators.
10:30–10:45	Summarize Ratings and Strategies	Summarize the ratings and ideas.
10:45–11:00	Next Steps	<p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Determine next steps including assigning homework as appropriate. Prepare for the next meeting of “Putting It All Together.”</p>

*\* Extend the meeting as necessary to fully explore the strategies for each component.*

## Suggested Activities

### Introductory Activity

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### Explore Strategies for Each Component

#### Option 1: Conversation Café Activity

This activity works well for larger groups.

1. Place chart paper and markers at each table so there are enough tables (or stations) for each component to be discussed. If necessary, split up the components into different groups, assigning multiple components to a table or group. Label the chart papers with the name of the component(s) to be discussed at that table.
2. Ask for volunteers to “host” a table (or station). Each host will stay at the table while the participants will move approximately every 10 minutes. Let participants know this will be an opportunity for everyone to provide input.

3. Refer all participants to their worksheets. Explain that the focus will be on Question #2, “What strategies should your agency consider to strengthen this component?”
4. Ask participants to move to a table or station so that they are evenly spread out (put these instructions on chart paper or on a slide and display at the front of the room). The table host should commence the discussion and keep notes.
  - a. Review the desired outcomes or conditions for each component.
  - b. Review the examples of promising or effective strategies. Discuss each of the proposed interventions. Through consensus, fill out the columns for “Implementation, A = already engaged; B = interested; C = NA or NI” and “Level of Difficulty, 1 = readily doable; 2 = feasible with effort; 3 = difficult.”
  - c. Discuss other potential strategies offered by participants, including ideas from the NCWWI website.
  - d. Use the chart paper to jot down key points, draw pictures, etc.
  - e. Table hosts assemble the rating and key points.
5. Ring a chime or call time after about 10 minutes (monitor the groups and adjust time accordingly) and ask participants to move to another table or station. The table hosts stay and convey the previous group’s discussion. Table hosts repeat the process and collect new ratings and ideas for this group.
6. Repeat this process as long as time allows.
7. Convene the large group and ask each table host to report out the main ratings and strategies. Record rankings on a master worksheet.
8. Tally up the rankings and assemble the strategy ideas.

### *Option 2: Group Discussion and Polling*

This option works well for smaller groups.

1. Refer all participants to their worksheets. Explain that the focus will be on Question #2, “What strategies should your agency consider to strengthen this component?”
2. Conduct a group discussion covering the following:
  - a. Review the desired outcomes or conditions for each component.
  - b. Review the examples of promising or effective strategies. Discuss each of the proposed interventions. Through consensus, fill out the columns for “Implementation, A = already engaged; B = interested; C = NA or NI” and “Level of Difficulty, 1 = readily doable; 2 = feasible with effort; 3 = difficult.”
  - c. Discuss other potential strategies offered by participants including ideas from NCWWI’s website.
3. Write key points on chart paper.
4. Repeat the process for each of the significant components.
5. Tally up the ratings and review the strategies.

## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

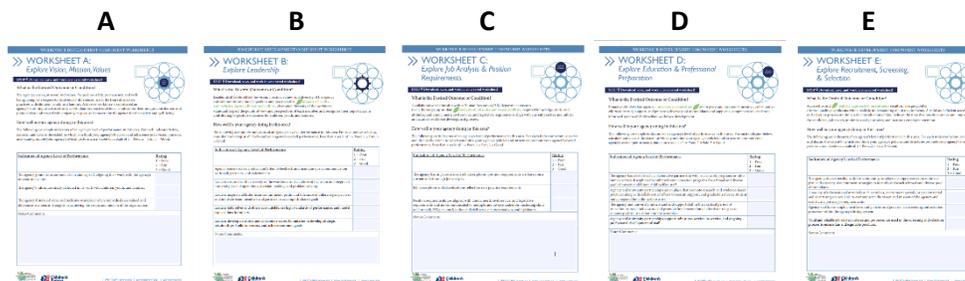
1. This process is comparable to carefully conducting an assessment with a family. When working with a family, a clear understanding of the situation leads to a stronger and more successful plan.
2. By understanding the indicators and root causes, a more compatible strategy can be chosen to address each component.
3. We are intentional about exploring the strategies related to diversity and equity that are included on each component worksheet.
4. The strategies presented in the worksheet are examples; explore others on the NCWWI website.
5. Each agency is unique; if the strategies found do not fit for this agency, customize or develop new ones to match this agency's resources and context. Think outside the box! Be creative!
6. Participants in today's meeting have the opportunity to imagine strategies that will best meet this agency's needs.

## Suggested Handouts

- Agenda
- **Workforce Development Framework (WDF) graphic**
- **Quick Guide: Exploring the Workforce Development Components: Where Do We Begin?**



- **Significant Issues** (typed up from last meeting)
- **Worksheets A–J** (to match the significant issues – Hyperlinked below)





# Chapter 5

## PUTTING IT ALL TOGETHER



# Putting It All Together

## Purpose: Prioritize Workforce Development Components and Develop an Action Plan

During this stage, the workforce development team puts it all together using the information gathered, analyzed, and designed to develop a short- and long-term action plan. This is where the team determines the strategies necessary to “close the gap.”

Recognize that the plan will be developmental and incremental, meaning that the team will want to start with small to medium size tasks and move to more significant efforts as the team acquires skills and confidence. The action plan will not address all workforce development components; rather, the team will focus on those components most likely to “close the gap.” When developing the components to address, consider:

- the agency’s capacity for implementing change;
- leadership’s commitment to change; and
- the cost, including staff time and other resources.

The action plan should focus on what can be accomplished in 3, 6, and 12 months in order to track progress and address any barriers that may arise.

Depending upon the strategies suggested, this stage may require one to two meetings to complete.



Activity options are presented for moving through each meeting. Each workforce development team should engage in a facilitated process that makes the most sense for their agency and context. The prioritizing meeting may also be combined with the action planning meeting so long as the meeting time is extended. If done, combine the annotated agendas for both meetings and allot approximately four hours.

The workforce development team reviews the completed worksheets from Steps 1–5 and any other pertinent information to continue the careful and methodical process of addressing their workforce issues. First, the team prioritizes the components, and at the next meeting, they will develop their action plans. Activity options will customize the meeting for the team size and preferences. The worksheet, *Prioritizing*, guides the process.

A suggested annotated agenda\* for the meeting follows in table 12.

Table 12. Meeting: Prioritizing the Components

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:10	Introductions	Conduct introductions as necessary.
9:10–9:15	Workforce Development Tool Kit	Orient team to their current location in the workforce planning and assessment process. Put up the graphic of the WDF and point to the current step.
9:15–9:40	Review Steps 1–4	<p>Review highlights from Steps 1–5. Prior to the meeting, assign each step to team members and ask them to prepare a 5-minute summary of each step to present to the larger team.</p> <p>Invite summaries on the following steps:</p> <ul style="list-style-type: none"> <li>• Step 1: Identify Need (organizational assessment)</li> <li>• Step 2: Gather Data (environmental assessment)</li> <li>• Step 3: Analyze Workforce Supply and Demand</li> <li>• Step 4: Identify Gaps</li> <li>• Step 5: Identify Strategies to Address Workforce Gaps</li> </ul>
9:40–10:30	Discuss the Summary	<p>Using worksheet, <i>Prioritizing</i>, discuss the findings from Steps 1–5 (see activity options). The questions on the worksheet are:</p> <ol style="list-style-type: none"> <li>1. What is your theory about the causes of your workforce gaps or needs?</li> <li>2. How are the gaps impacting your agency?</li> <li>3. What are the short- and long-term outcomes that you would like to see for your workforce as a result of your plans?</li> <li>4. How will the workforce be the same/different as a result of your plan? What are your success indicators?</li> </ol>
10:30–10:50	Prioritize Components	<p>Invite team members to prioritize the components (see activity options). Rank order the following components from 1–10 to determine areas to focus on for the action plan.</p> <ul style="list-style-type: none"> <li>• Job Analysis and Position Requirements</li> <li>• Education and Professional Preparation</li> <li>• Recruitment, Screening, and Selection</li> <li>• Incentives and Work Conditions</li> <li>• Professional Development and Training</li> <li>• Organizational Environment</li> <li>• Community Context</li> <li>• Supervision and Performance Management</li> </ul>

		<ul style="list-style-type: none"> <li>• Leadership</li> <li>• Vision, Mission, Values</li> </ul>
10:50–11:00	Next Steps	<p>Review the final list of priorities. Ask for volunteers to summarize the strategies from the meeting where the group brainstormed strategies for each component. Consider assigning multiple volunteers to various components.</p> <p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Remind team members of the next meeting date.</p>

*\* Extend the meeting as necessary to provide sufficient time for categorizing the components.*



Type up the “prioritized components” list to make available for the next meeting.

## Suggested Activities

### Introductory Activity

- As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_”
- Record responses on chart paper
- Refer back to these responses as appropriate during the meeting

### Discussion

*Note, the intent of these options is to provide sufficient opportunities for all team members to participate in the discussion.*

Option 1: Small group (fewer than 8 people):

1. Review the first question, ask team members to turn to the person next to them and discuss the question for a minute or two.
2. Reconvene the large group and ask for highlights of their discussion.
3. Write significant points on the chart paper labeled question 1.
4. Repeat for questions 2–4, writing significant points on chart paper.

Option 2: Large group (more than 8 people)

1. Divide participants into small groups of 3–5 people in whatever way makes sense. Ask each group to discuss the four questions, writing significant points on the worksheet.
2. Allow about 20 minutes for the discussion.
3. Bring the group back together and ask each group to present highlights of their discussion. As appropriate, write key points on chart paper.
4. Note similarities and differences in the group discussion, highlighting major themes.

*Prioritize Components*

*Option 1:*

1. Place chart paper on the walls with each component (examples below).



2. Invite team members to rank order each component. Distribute 10 post-its with numbers 1 through 10 written—one number (1, 2, 3, 4, etc.) per post-it. Ask each person to designate their ranking for each component by placing a number that matches their vote; 1 is the most important component and 10 designates a component of the least importance compared to the others.
3. Allow a few minutes for team members to place their “votes” on the chart paper.
4. Determine the average ranking for each component by adding up the numbers for each component and dividing by the number of meeting participants. For example, 10 meeting participants placed the following votes:

- 3
- 3
- 3
- 4
- 2
- 5
- 3
- 5

2

3

$33 / 10 = 3.3$  (likely to be ranked third)

Do this for each component to find the average ranking. Designate a ranking for each component, breaking ties by asking for another vote as appropriate. This can be done by a simple show of hands.

5. Note the rank order of each component on the chart paper (e.g., #1, #2, #3).

#### Option 2:

1. Use a polling software such as PollEverywhere. In advance, prepare polls with each workforce development component (for 10 polls). Be sure to select the answer option that will provide a mean for each poll.
2. Refer to the *Prioritizing Worksheet*. Ask them to take a few minutes and rank order this list, 1 to 10.
3. Invite team members to participate in the poll by typing in their rating for each component. Note the mean ranking on chart paper.

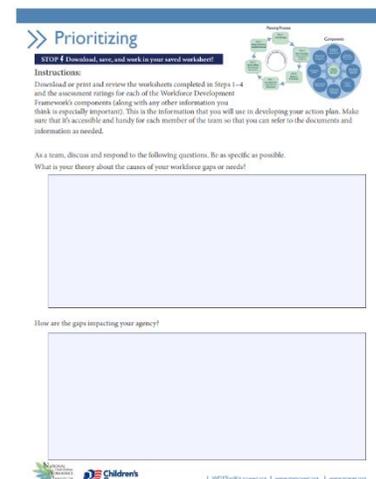
## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

1. This next phase is where the team “puts it all together” by reviewing key information and prioritizing the workforce components.
2. The careful and methodical approach continues. Much information has been gathered for this team to make informed decisions about action planning.
3. Summaries of the steps should include mention of diversity, equity, and inclusion.
4. Reviewing this information is critical so that the team does not impose their own opinions in the process. Rather, the team relies on objective information mutually gathered and agreed upon by all.
5. While differences of opinions may exist, this meeting seeks consensus to move forward with the action plan.
6. The prioritized workforce development components inform the action plan.

## Suggested Handouts

- Agenda
- **Workforce Development Framework (WDF) graphic**
- Handout: **WDF Components Ranking**
- **Worksheet: Prioritizing**



## Developing the Action Plan

Action planning occurs during this meeting and focuses on those components prioritized in the last meeting. The workforce development team reviews the strategies developed in Step 5 (Worksheets A–J). Using the action plan template, they develop an action plan specifying tasks and activities, persons responsible, and time frames for completion.

A suggested annotated agenda\* for the meeting follows in table 13.

Table 13. Meeting: Developing the Action Plan

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:05	Introductions	Conduct introductions as necessary.
9:05–9:10	Workforce Development Tool Kit	Orient team to their current location in the workforce process. Put up the graphic of the WDF and point to the current step.
9:10–9:25	Review Strategies	Review the strategies identified in Step 5. Distribute copies of Worksheets A–J as appropriate. Ask for the volunteers to summarize the strategies either selected or designed from Step 5 and as documented in the worksheets.
9:25–9:40	Discuss Race/Equity Issues	<p>Recollect the discussion on race/equity issues. Ask the team the following questions:</p> <ul style="list-style-type: none"> <li>• What were some of the significant issues brought up about race/equity relevant to this agency’s workforce?</li> <li>• How will this team keep them in mind as the action plan is developed?</li> </ul>
9:40–10:45	Develop Action Plan	<p>Using the worksheet, <i>Action Plan</i>, develop the action plan. Assign a notetaker to record the action plan. As a group, start with the number 1 prioritized component. At this point, target 3–4 components for the action plan. Ask everyone to go to the worksheets with the strategies for the top-rated components.</p> <p>Remind participants to consider race/equity issues as they develop their action plan.</p> <p>Using the worksheets developed in Step 5. Ask the team the following questions to complete the action plan.</p> <ol style="list-style-type: none"> <li>1. What strategies shall be selected for the: <ul style="list-style-type: none"> <li>• Short term</li> <li>• Long term</li> </ul> </li> </ol> <p>Write down the strategies selected and complete the table for each strategy.</p> <ol style="list-style-type: none"> <li>2. What tasks/activities are necessary to make the</li> </ol>

	<p>strategy happen?</p> <ol style="list-style-type: none"> <li>3. Who is responsible for each strategy?</li> <li>4. What is the time frame for each strategy?</li> <li>5. How will the strategy impact short- and long-term outcomes?</li> <li>6. How will this be monitored?</li> </ol> <p>Continue the process as a large group to address the 3–4 prioritized components. Alternatively, use an activity suggested below.</p> <p>Also address how and what will be communicated about these efforts. See the <i>Communication</i> section in Chapter 7 for more information about how to develop the communication portion of your plan.</p>
<p><b>10:45–11:00</b></p>	<p>Next Steps</p> <p>Review the action plan. Discuss how the plan will be monitored and communicated on an ongoing basis.</p> <p>Debrief the meeting, asking questions such as:</p> <ul style="list-style-type: none"> <li>• What did we accomplish today?</li> <li>• Were we inclusive?</li> <li>• Did we pay attention to our process?</li> <li>• What do we need to do differently or work on?</li> </ul> <p>Remind team members of the next meeting date to begin the monitoring and evaluation process.</p>

*\* Extend the meeting as necessary to provide sufficient time to flesh out the action plan.*

## Suggested Activities

### Introductory Activity

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### Action Planning Activity

1. Divide the team into the number of components they will focus on (three or four) in whatever way makes sense.

2. Assign one component per group and ask them to consider the questions and to fully complete the action plan template for each strategy chosen within each component. Remind them to consider race/equity issues.
3. Allow about 30–40 minutes for this small group discussion.
4. Reconvene the group and ask each small group to present their action plan. Invite other team members to comment on the proposed activities and tasks to ensure that all aspects are considered.
5. Collect the action plan templates.



Type up action plan templates into one file. Also, consider using a project management software such as Asana, SmartSheet, or another to centralize the document and provide automatic reminders to any individual assigned a task.

## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

1. This meeting culminates all the efforts made to date, and participants develop a comprehensive action plan.
2. Strategies chosen should be realistic and address the root issues of a particular component.
3. We focus on strategies that can be accomplished in the short term (approximately 3 months) as well as the longer term (6 and 12 months). So that we will have early successes, we will make sure that our action plan contains strategies of various degrees of complication. These short-term strategies are the “low-hanging fruit” that we can pluck for an immediate win.
4. We remind ourselves of the issues of race, equity, and inclusion to ensure that they are purposely addressed in our plan.
5. We spread out the tasks among team members so that everyone shares in the responsibility for making the plan happen and closing the “workforce gap.”

## Suggested Handouts

- Agenda
- **Workforce Development Framework (WDF) graphic**
- **Worksheet: Action Plan Template**
- **Microlearning: 3 Tools to Guide Change Efforts**
- **Worksheet: Action Plan Template**

**STOP!** Download, save, and work in your saved workload!

**Instructions:**  
For each component, and based upon your assessments, develop a plan for completing each strategy.

WORKFORCE DEVELOPMENT ACTION PLAN		
WDF Component:		
Strategy:		
Short-term outcomes for this strategy:		
Long-term outcomes for this strategy:		
Product and/or Deliverable		
Tasks and activities	Who is responsible?	Timespan for completion
Plan for monitoring and evaluating impact (Include information from Step 6: Monitor & Evaluate)		

View another Action Plan Template: Washington State Human Resources

Children's Bureau

# Chapter 6

# MONITORING AND EVALUATION



# Step 6: Monitor and Evaluate

**Purpose:** Periodically Check in to Determine Progress on the Action Plan

During this stage, the workforce development team periodically meets to assess progress, consider impact, and revise the plan based upon changing conditions in the agency's internal and external environments. This stage completes the cycle of continuous quality improvement illustrating the qualities of a learning organization.

Use agreed-upon metrics and other information to track progress and inform any adjustments needed to the plan. Monitoring meetings should occur at least monthly to quickly adjust as needed. Given the effort that has gone into the development of this plan, it will be critical to hold these monitoring meetings so that the team and staff continue to see the commitment to workforce development. More frequent meetings also encourage a quick response to any barriers that may arise and provide opportunities to celebrate successes along the way. As implementation progresses, less frequent meetings may be needed so long as plan implementation continues.



During the monitoring meetings, consider the following:

- Program activities (What activities have occurred to implement the plan?)
- Progress on outcomes (How have the implemented strategies affected outcomes?)
- Internal and external developments (Have there been any leadership changes? Have there been any dramatic changes in resources? Have any new initiatives started?)
- Environmental changes (Are there any new stakeholders? Has there been any recent media scrutiny?)
- Trends (Have unemployment rates changed? Has there been an influx of any immigrant groups?)
- Impacts (Have the implemented strategies influenced issues of equity?)

During monitoring meetings, revisit the plan, considering:

- Alignment with other strategic efforts in the agency
- Successes/failures and status of action plan strategies

- Communication plan efforts (see Chapter 7)
- Ongoing leadership and staff support

Meetings should occur at least monthly during the first six months of implementation. Consider the tenets of implementation science when conducting these meetings to ensure attention to all implementation drivers and that efforts to implement the plan match the implementation stage (see Chapter 7).

Ongoing monitoring allows for easy course correction when barriers arise or strategies are not achieving outcomes as expected. A more formal evaluation of the plan’s progress and outcomes should occur at least every two years or as needed.

Methods to assess progress may include:

- Surveys
- Focus groups
- Administrative data
- Use of culturally responsive/appropriate research/evaluation practices

Consider conducting a more formal organizational culture and climate survey every two years to assess progress and adjust as needed.

Meetings need only be an hour at this stage. A suggested annotated agenda for the meeting follows in table 14.

Table 14. Meeting: Monitoring the Evaluation Plan

TIME	AGENDA ITEM	SUGGESTED APPROACH
9:00–9:05	Introductions	Conduct introductions as necessary.
9:05–9:10	Shout-Outs	Invite team members to share noteworthy examples of efforts on behalf of implementation. Ask, “what’s going well?”
9:10–9:40	Action Plan Review	Review each objective of the action plan, asking team members to report out on progress and barriers. Consider the activity options below.  As appropriate, strategize on ways to overcome any barriers that may have arisen.  For each objective, ask whether race/equity issues are being sufficiently addressed.  Adjust the plan as needed.
9:40–9:50	Review Communication Efforts	Determine the communication mechanisms used to date. Ask, “do staff know about our efforts?” “What else can we do to communicate our efforts to improve our workforce?”

9:50–10:00

Next Steps

Summarize the progress to date, confirm any assignments, and upcoming events.

Debrief the meeting, asking questions such as:

- What did we accomplish today?
- Were we inclusive?
- Did we pay attention to our process?
- What do we need to do differently or work on?

Remind team members of the next meeting date.



Maintain and update the action plan in a central location available to anyone in the agency.

## Suggested Activities

### *Introductory Activity*

1. As appropriate, conduct introductions and ask team members to provide the following:
  - Name
  - Position
  - Years with the agency
  - Fill in this blank, “I’m excited about this workforce development process because \_\_\_\_\_.”
2. Record responses on chart paper
3. Refer back to these responses as appropriate during the meeting

### *Action Plan Review*

1. Write objectives and activities on chart paper.
2. Distribute red, yellow, and green dots to each team member.
3. Ask them to choose and place a dot representing their opinion about the progress of each objective/activities (red = no progress, yellow = some progress, green = progress made).
4. Review the dot colors representing perceived progress. For all red dots, ask about barriers are interfering with progress. For all yellow dots, ask what is going right and what could be done to turn it to a green. Note the green dots connoting objectives and activities going well.
5. Save the chart paper, circling the dots and giving a date. Repost them for the next meeting using the same process.

## Suggested Talking Points

During the meeting, be sure to cover the following talking points:

1. Our efforts to develop the plan are complete. Constant monitoring ensures that the plan is realized.
2. The careful and methodical approach continues. Just as we methodically developed a plan, so we will monitor our plan.
3. Issues of race, equity, and inclusion must be sufficiently addressed in the evaluation plan.
4. During the implementation process, highs and lows will happen. We continue the workforce development journey by following our road map—the action plan.
5. Just as we developed the plan as a team, we will use our team to address and develop solutions for any roadblocks in our way.
6. Attention to this stage reinforces the ongoing importance of workforce development to staff.
7. Using a structured, evidence-informed change implementation process, our agency will be more likely to achieve and sustain long-term success in developing and retaining a committed child welfare workforce—one that embraces the vision and mission of our agency and its critical role in supporting positive outcomes for children, youth, and families.

## Suggested Handouts:

- Agenda
- **Workforce Development Framework (WDF) graphic**
- **Handout: Action Plan**

>> Action Plan Template

**STEP 4** Download, use, and work in your state's workforce

**Instructions:**  
For each component, and based upon your assessments, develop a plan for completing each strategy.

**WORKFORCE DEVELOPMENT ACTION PLAN**

WDF Component:  
Strategy:

Short-term outcomes for this strategy:

Long-term outcomes for this strategy:

Product and/or Deliverable

Tasks and activities	Who is responsible?	Timeframes for completion

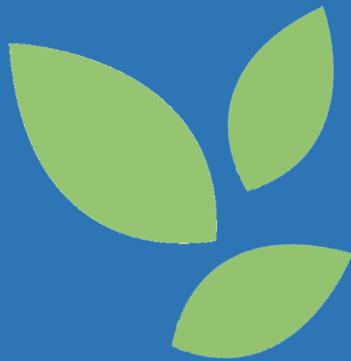
Plan for monitoring and evaluating impact (Include information from Step 6: Monitor & Evaluate)

View another Action Plan Template: [West Virginia State Human Resources](#)

Children's Bureau | WDF Toolkit | [www.ncwwi.org](#) | [www.ncwdf.org](#)

# Chapter 7

# IMPLEMENTATION AND SUSTAINABILITY



# Implementation and Sustainability

## Purpose: Maximizing the Chances Your Efforts Will Succeed Through Effective Implementation

Many people came together to engage in a thorough workforce development assessment and planning process to develop an action plan for strengthening the workforce. This chapter presents information on long-term implementation and sustainability and to address factors that can make or break your plan. Use of *implementation science* can facilitate the sustainability process and maximize the chances your efforts will succeed.

### Implementation Science

*Implementation science* (Fixsen et al., 2005) developed from a concerted research effort to understand the factors leading to successful implementation. Your agency may choose among multiple implementation approaches such as the Getting to Outcomes (Wiseman et al., 2007) approach or guidance provided by the National Implementation Research Network (NIRN). For more information about various approaches to implementation, click on the link to be directed to NCWWI’s website page on implementation [<http://ncwwi.org/index.php/resource-library-search/resource-topics/change-implementation>].

Most importantly, agencies should engage in an implementation and sustainability process right for them, knowing that efforts may change over time and the plan adjusted to accommodate new realities. Whatever implementation process your agency uses, make sure it is **thorough, strategic, and flexible** for long-term sustainability of your workforce development efforts.

This chapter presents basic information about implementation science and sustainability including:

- Implementation drivers
- Implementation stages
- Implementation roles
- Communication efforts
- Sustainability

“

Be creative while inventing ideas, but be disciplined while implementing them.”

— Amit Kalantri

## Implementation Drivers (Adapted from Fixsen et al., 2005)



Figure 1. Implementation Drivers

NIRN identifies research-based *implementation drivers* necessary for successful implementation efforts (See figure 1). Both integrated and compensatory, drivers work together and depend on each other (integrated), though strength in one or several drivers can make up for deficits in others (compensatory). Drivers can apply to specific initiatives, such as implementation of an evidence-based practice, or to broader efforts, such as a new approach to workforce development. Drivers fall into three categories:

1. Competency Drivers – Mechanisms to develop, improve, and sustain the ability to implement interventions as intended.
2. Organization Drivers – Mechanisms to create and sustain hospitable organizational and system environments.

- Leadership Drivers – Focus on aspects of leadership that will facilitate the change effort. Some of the issues dealt with by leadership will be technical in nature, others are adaptive and require more creative problem-solving. See the microlearning on **Adaptive Leadership**.



See below for broad definitions of each driver.

### *Shared Vision, Values, and Mission*

A shared understanding of vision, mission, and values exists among leaders and stakeholders. This shared understanding promotes change and provides a framework for the project. See the microlearning on **Leading with Vision**.



### *Leadership*

Buy-in, leadership, and champions for change exist at all levels of the organization and system. Clear and frequent communication channels exist among leadership, staff, and stakeholders.

### *Staff Selection*

Job descriptions, recruitment strategies, and hiring procedures align to identify and hire staff with the knowledge, skills, and abilities to support the new model. Agency selects new or existing staff to carry out the design and/or implementation of the project/intervention. Information on various components can be found in NCWWI’s microlearning library.

### **Recruitment Strategies**



### **Attracting the Best**



### **Screening Strategies**



### *Training*

Staff at all levels receive training on the intervention. The agency allocates appropriate resources to support the training, technical assistance, and expertise necessary for implementation.

### *Supervision/Coaching*

The agency develops and implements supervision and coaching plans for staff at all levels to support the integration of new skills related to the intervention.

*Performance Assessment*

A mechanism exists for assessing staff about their performance in carrying out the intervention.

*Facilitative Administration*

Staff has added or changed practices, policies, and procedures as needed to support and align with implementation of the project/intervention. Staff has changed organizational structures and roles as needed to support implementation.

*Systems Intervention*

Staff added or adapted system-wide structures as needed to support implementation and shared accountability.

*Decision-Support Data Systems*

Staff uses data to inform the development and design of the intervention. Data collection and reporting systems exist and monitor fidelity and outcomes of the project/intervention. Quality assurance/improvement mechanisms exist and assess and improve the functioning of the organization as it relates to the intervention.

*Stakeholder Engagement*

Internal and external stakeholders, including caregivers, families, and youth, are actively and consistently involved in planning, implementation, evaluation, and decision-making, ensuring the system change meets their needs.

*Cultural Responsiveness*

Selected interventions reflect cultural responsiveness and overtly address race, equity, and inclusion issues. Interventions emphasize cultural responsiveness of staff at all levels and use of culturally appropriate services.

It should be noted that many of these drivers might also be the focus of your workforce development plan such as improving staff selection or supervision. Table 15 offers specific guidance on how each driver applies to the initiative to improve workforce development.

Table 15. How the drivers apply to the workforce development efforts

IMPLEMENTATION DRIVER	HOW IT APPLIES TO WORKFORCE DEVELOPMENT EFFORTS
<b>SHARED VISION, VALUES, AND MISSION</b>	Staff understand and buy into the efforts for improving workforce development.
<b>LEADERSHIP</b>	Leadership supports the efforts through their talk and actions. They support staff’s participation on the workforce development team and

	allow sufficient time to engage in activities related to it. Team members provide leadership both inside and outside the team in support of the efforts.
<b>STAFF SELECTION</b>	Staff at all levels understand and support the importance of workforce development. When hiring new staff, applicants are queried about their knowledge and commitment to workforce development.
<b>TRAINING</b>	The agency provides training to staff on topics relevant to the workforce development efforts such as implementation, facilitation, and workforce more broadly.
<b>SUPERVISION/COACHING</b>	Supervisors support staff in their participation on the workforce development team. During supervision, supervisors discuss the importance of workforce development and attend to the components. As appropriate, supervisors coach staff on dealing with any issues that may arise related to workforce development.
<b>PERFORMANCE ASSESSMENT</b>	Supervisors and managers have performance standards related to workforce development built into annual performance assessments.
<b>FACILITATIVE ADMINISTRATION</b>	Workforce development is built into the job descriptions, policy, staff expectations, and structures of the agency to raise the profile of these efforts. When appropriate, administration authorizes resources on behalf of workforce development efforts.
<b>SYSTEMS INTERVENTION</b>	As appropriate, system-wide structures support workforce development efforts such as central file sharing and office space.
<b>DECISION-SUPPORT DATA SYSTEMS</b>	Data are collected about workforce retention and organizational culture and climate to inform the continuous quality improvement cycle.
<b>STAKEHOLDER ENGAGEMENT</b>	As appropriate, stakeholders throughout the agency as well as external to the agency inform and are involved in workforce development efforts.
<b>CULTURAL RESPONSIVENESS*</b>	Cultural responsiveness runs through all aspects of workforce development, including the use of specific strategies to address race, equity, and inclusion issues.

\* Added to NIRN's model

## Implementation Roles (Rogers, 2010)

During implementation, individuals will assume various roles that can both compel the workforce development action plan or detract from, or even sabotage, it. Knowing these various roles and how to encourage or address them can help the team move the process along. Information on various components can be found in NCWWI's microlearning library.

### Change and the Roles People Play



### Early adopters

These people will engage in the early stages of a change initiative. Early adopters are more open to new ideas.

### Middle adopters

Research shows that most people (almost two-thirds) are middle adopters. These individuals learn from trusted peers as well as—or even more than—from training.

### Late adopters

These people are masters of the coping strategy, “This too shall pass.” They will wait to make sure that the change is really part of their job.

### Resisters

These are the people who say, “It’ll never work, we tried this before, we can’t do this because of workload. . . .” As you move ahead, resisters might be your most valuable champions if they “convert.” If they don’t come on board, they are likely to leave to work somewhere else as the change becomes an embedded part of the agency culture.

### Champions

Every initiative needs a champion who will advocate about the initiative to all levels of staff. “Champions” (often early adopters) can be found at any level of the organization.

### Minders

This is a great job for managers. Not necessarily champions, these are the people who will be guardians of workforce development efforts in budget sessions or other meetings where the effort might need support. They may not lead the charge, but they will be present to protect it when choices are made behind closed doors on what programs to cut or how to spend leftover funds before the end of a funding cycle.

Table 16 presents possible strategies for engaging each role.

Table 16. Strategies to engage implementation roles

IMPLEMENTATION ROLE	STRATEGIES TO ENGAGE THIS ROLE
EARLY ADOPTERS	Pick up on their enthusiasm and invite them to join the workforce development team; encourage them to attend meetings and lead action items related to the plan. Ask them to support the effort and share what they have learned from their peers.
MIDDLE ADOPTERS	Provide hands-on support and coaching from trusted peers.

LATE ADOPTERS	Offer them opportunities for peer-to-peer learning from the early and middle adopters. Show them the results of the efforts. Consider rewards and incentives for their participation.
RESISTERS	Inquire about their objections and then offer to help address them. Provide frequent communication about successes. Tell the stories of successful efforts.
CHAMPIONS	Identify and engage champions to lead the workforce development strategies; use their knowledge and expertise to help get the word out.
MINDERS	Identify possible minders and engage them in what is needed for success and sustainability; for example, individuals who attend budget meetings “mind” the workforce efforts at the financial level while “minders” at the supervisor level maintain enthusiasm and participation in the plan’s implementation.

## Implementation Stages

All initiatives go through stages on their way to full implementation and sustainability. Each has implications and corresponding strategies to successfully move through it. A stage not thoroughly addressed weakens subsequent stages and endangers the overall effort. See also the microlearning: [Stages of Implementation and Implementing Change \(drivers\)](#)



“  
Ideas are easy.  
Implementation  
is hard.”  
— Guy Kawasaki

### Exploration Stage

Steps 1–5 of the workforce development process become the exploration stage. These steps occur over a lengthy period of time so that the team can fully explore the issues in order to create readiness for workforce changes.

### Installation Stage

The installation stage occurred during Steps 5–6 with the preparation of the plan. Resources, both hard and soft, were sought and put into place to support the plan’s rollout. The workforce development team helped the organization secure the needed resources to do the work ahead and prepare staff for the new practices.

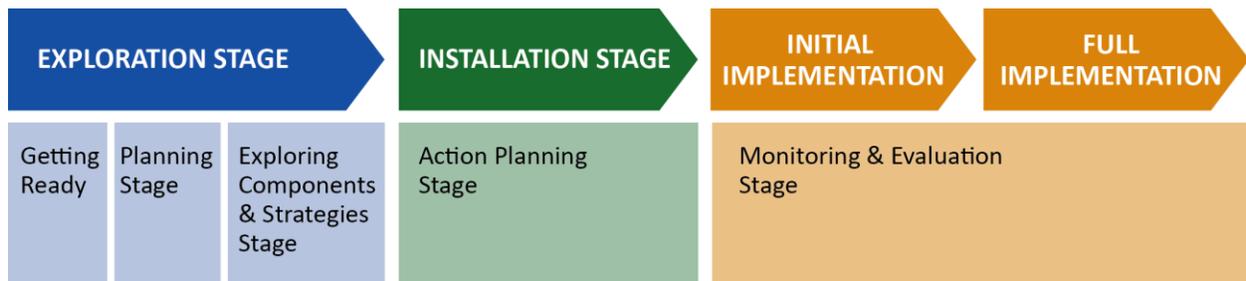
### Initial Implementation

In the workforce development process, initial implementation occurs during the beginning phases of Step 6, monitoring and evaluation. In this stage, the workforce development plan can lose steam or thrive with increasing strength. This fragile stage acknowledges the awkwardness associated with

trying new things and the difficulties associated with changing old ways. Facilitate movement through this phase by paying attention to the implementation drivers and encouraging early adopters and champions.

### Full Implementation

Full implementation happens when the approach to workforce development becomes integrated into the organizational culture and embedded in how the organization does business. Over time, the workforce development process repeats. Full implementation may take two to four years to achieve.



## Communication

Workforce development teams engage in strategic communication to share frequent and targeted messages about the workforce development efforts to gain greater visibility, build support, and realize goals.

Build support by communicating the importance of workforce development and the positive impact it can have on the organizational culture as well as children and families through improved outcomes. Staff's cooperation and commitment make the approach to workforce development happen.

People respond better to any new change when they have experienced effective communication. Keep in mind the following communication guidelines throughout the workforce development process:

- Share the vision for the workforce development efforts.
- Provide reliable and up to date messages using a variety of delivery methods.
- Engage agency leadership in making a visible commitment and reinforcing key messages.
- Offer open, honest, and strengths-based communication.
- Explain connections between past efforts, changes, or current initiatives; how they are aligned,

**“Communicate unto the other person that which you would want him to communicate unto you if your positions were reversed.”**

— Aaron Goldman

and the role and responsibilities of those affected.

- Tell a story that meaningfully illustrates the message.
- Use full-circle communication strategies: top/down, bottom/up, and across the levels.
- Use culturally responsive and inclusive communication techniques to ensure that underrepresented groups have an effective structure for receiving information and providing feedback.
- Provide opportunities for dialogue about the efforts to gather feedback and respond to questions.
- Practice strong and timely follow-up with all communication.

Thorough communication plans define how and what will be communicated. Communication plan elements include:

- Delivery methods
- Activities/tasks
- Messages
- Time frames
- Persons responsible

See below for examples of delivery methods and types.

<b>Delivery Methods</b>	<b>Types</b>
• Email	Infographics
• Bulletin Boards	Posters
• Newsletter	Event Notifications
• Agency Blog	Ask the Director
• Meetings (all-staff, unit)	Social Media Posts
• Lunch and Learns	Meeting Minutes
• Website	Videos
• Social Media	
• Network Share Drive	

Prepare and train the workforce development team in developing and sharing messages. In whatever way the workforce development team chooses to operationalize their plan—remember the most important point: communicate, communicate, communicate!

Communicate,  
Communicate,  
Communicate!

## Sustainability

Sustainability means the ability to maintain the workforce development efforts over time. There is no “one-size-fits-all” strategy for implementing sustainability; rather, pay attention and customize your sustainability efforts based upon your context and efforts. Start planning for sustainability at the beginning of your effort and attend to it throughout implementation. Sustainability happens in an iterative manner, gaining strength and losing it as enthusiasm ebbs and flows. Expect change when staff resigns or are added, resources change, and leadership shifts.



As the workforce development team moves from assessment and planning to implementation, consider sustainability throughout each phase.

During the assessment process, identify the people and processes that will be necessary for long-term sustainability.

When engaged in the planning phase, think long term about the resources and structures necessary to keep the momentum going.

While in the implementation phase and during the monitoring meetings, bring up the issue of sustainability, asking questions such as:

1. What are some initial ideas on strategies for sustainability for these workforce development efforts?
2. What are the challenges you foresee in terms of implementing sustainability strategies and how can they be addressed?
3. How should and/or could sustainability approaches be addressed in the action plan?
4. What can the team do to promote sustainability?

### Strategies for Sustainability

Over time, agencies will experience all sorts of changes from leadership shifts to workforce supply and demand levels. Put in place the following strategies to ensure the continuity of your workforce development efforts.

- Designate a person as the “Workforce Development Specialist,” whose job it is to oversee ongoing implementation.

- Identify a workforce development champion within the middle-management ranks who intends to be at the agency long term. Transition this to others as appropriate.
- Onboard new leaders with a thorough briefing of the workforce development efforts, including a written document detailing the history, agency commitment, and accomplishments to date.
- Immortalize workforce development policies and practices in your agency’s policy and practice manuals.
- Hold a special meeting each year for a “State of Our Workforce” to review data and strategies. Consider looking at benchmarks established in the plan and ongoing progress toward outcomes.
- Attend conferences and participate in webinars related to workforce development efforts to stay on top of current practices.
- Integrate expectations related to workforce development into job descriptions and performance appraisals.
- Maintain communication through in-house newsletters, blogs, and intranets about workforce-related accomplishments.

## In Summary

By focusing on sustainability, everyone at your agency sees the long-term commitment to hiring the right people, preparing them for their jobs, and retaining them. Workforce development challenges will remain, no matter the economy, the leadership, or the practice environment. Making a commitment to workforce development and sustaining these efforts will show all staff that they matter and that the agency is committed to them and the children and families they serve.



NCWWI frequently adds new resources to our website. Come back often for the latest information related to all aspects of workforce development: [www.ncwwi.org](http://www.ncwwi.org)

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# Appendix

## Data Sources

Click on the links below to gather data and other information pertinent to your planning process.

National Labor Force Statistics—Demographics, <https://www.bls.gov/cps/demographics.htm>

This website contains information about national labor force statistics with demographic characteristics available from the Current Population Survey. Data on the labor force characteristics of employed and unemployed persons, plus hours of work and earnings, also are available. This information may be helpful when determining salary ranges.

Bureau of Labor Statistics: Occupational Handbook, <https://www.bls.gov/ooh/community-and-social-service/social-workers.htm>

This website offers information about the occupation of social worker and relevant data such as median pay, entry level education requirements, number of jobs, anticipated growth rates, etc.

U.S. Census Bureau, <https://www.census.gov/>

This website offers broad information about the U.S. society and economy and has a wide range of facts such as demographic characteristics of the state's population, including age ranges, race, ethnicity, etc.

## Activities

Click on the links below to find more information on the activity ideas presented in this Guide.

Liberating Structures, <http://www.liberatingstructures.com/>

Website contains a variety of activities to fully engage participants in meetings, trainings, and events.

PollEverywhere, <https://www.polleverywhere.com/>

Poll software using mobile technology to engage audiences and anonymously gather opinions.

## Project Management

Project management sites can help facilitate organizing your project. Click on any of the links below for more information.

Asana, <https://asana.com/>

SmartSheet, <https://www.smartsheet.com/>

File Sharing: Cloud sites offer a central location to store documents

Dropbox, <https://www.dropbox.com/>

## Race, Equity, and Inclusion

Race Equity Action Plans, <http://www.racialequityalliance.org/wp-content/uploads/2016/11/GARE-Racial-Equity-Action-Plans.pdf>

Culturally responsive/appropriate research/evaluation practices,  
<http://ncwwi.org/index.php/resource-library-search/resource-topics/cultural-responsiveness-disproportionality/item/1482-starting-with-the-numbers-the-importance-of-data-collection-analysis-in-system-efforts-to-eliminate-racial-ethnic-disparities>

## Communication

Click on this link for more information about development a formal communication plan: **Systems of Care Communication Toolkit**