# Workforce Sustainability Check

## Before staff turnover becomes a program disruption

Use this team-level pulse check to identify preventable strain, continuity vulnerabilities, and retention risks. Collect staff input without retaliation; report only aggregated results where privacy could be compromised.

How to use: Mark each statement 0 = Not in place, 1 = Partially in place, 2 = In place and evidenced. Mark N/A only when genuinely outside your organization's scope; exclude N/A from the denominator. For each score of 0 or 1, record the missing evidence or corrective action.

Organization: _____ Review date: _____ Reviewer: _____

## Workload & coverage

| | |
|---|---|
| 01. Current caseloads or workloads are reviewed against available paid hours and service expectations. | 0 / 1 / 2 / N/A |
| 02. Overtime, vacancies, leave coverage, and backlogs are tracked and discussed. | 0 / 1 / 2 / N/A |
| 03. Essential functions have a trained backup, handoff instructions, and coverage plan. | 0 / 1 / 2 / N/A |

## Support, safety & voice

| | |
|---|---|
| 04. Staff have protected time for supervision, feedback, and skills development. | 0 / 1 / 2 / N/A |
| 05. Staff can raise workload, safety, and workplace concerns without fear of retaliation. | 0 / 1 / 2 / N/A |
| 06. Managers follow up on reported barriers and communicate what has changed. | 0 / 1 / 2 / N/A |

## Retention & sustainability

| | |
|---|---|
| 07. Staff understand their roles, decision authority, and escalation routes. | 0 / 1 / 2 / N/A |
| 08. Compensation, advancement, flexibility, and recognition concerns are periodically reviewed. | 0 / 1 / 2 / N/A |
| 09. Exit or stay feedback is analyzed for patterns rather than treated as isolated incidents. | 0 / 1 / 2 / N/A |
| 10. Leadership has a documented response plan when workload or attrition signals worsen. | 0 / 1 / 2 / N/A |

## Scoring & interpretation

Score: ____ points earned / (2 x ____ applicable statements) = ____%. Suggested triage only: 85-100% generally established controls; 65-84% targeted gaps; below 65% significant preparation needs. These cutoffs are planning conventions, not validated thresholds. A single critical legal, safety, privacy, or financial failure overrides the percentage.

Priority warning signs: Persistent understaffing; unsafe workload; no backup coverage; staff fear reporting; repeated departures.

## Immediate action plan

Highest-risk gap and supporting evidence: _____

Owner and corrective action: _____

Target completion date: _____ Verification method: _____

## Evidence cross-reference

CDC/NIOSH, Worker Well-Being Questionnaire (revised 2026), multidimensional worker well-being framework; this is NOT the WellBQ instrument: https://www.cdc.gov/niosh/publications/numbered/2021-110.html

OSHA, Worker Participation, nonretaliatory reporting and employee input: https://www.osha.gov/safety-management/worker-participation

AHRQ, Surveys on Patient Safety Culture, staffing/work pace and communication as organizational culture dimensions (healthcare-specific): https://www.ahrq.gov/sops/index.html

Important: This is an original, evidence-informed preview checklist, not a licensed or psychometrically validated assessment. Applicable requirements depend on your sector, funding, contracts, and jurisdiction. A completed checklist does not establish compliance or guarantee audit outcomes.

## REQUEST THE EXPANDED ASSESSMENT

**To request the expanded workforce sustainability check toolkit, choose one pathway: subscribe to the Thrive Forward Solutions newsletter; or follow Thrive Forward Solutions on three different social media platforms; or leave three separate comments on our social posts using the keyword CHECK. Then contact info@tfs-tin.org with the keyword and your preferred delivery email.**

Full version preview: extended item bank, evidence register, scoring worksheet, corrective-action tracker, and management review template. Access and fulfillment details are subject to confirmation by TFS.