

ORGANIZATIONAL SELF-CARE ASSESSMENT TOOL

Introduction

Taking care of one's self at work is an important part of self-care. For those who work in healthcare, job stressors faced on a daily basis can result in a high risk for burnout, compassion fatigue, and secondary trauma. Organizational self-care is an approach that moves beyond self-care as an individual practice to accepting it as a collective responsibility. For health centers, maintaining an engaged and motivated health workforce is not only beneficial in providing quality care, but it is also an important strategy in building resilience, attracting and retaining employees, and creating a culture of care that serves both your employees and your patients.



Health Outreach Partners (HOP) developed the **Organizational Self-Care Assessment Tool** (see page 4) as a resource for health centers to better understand their efforts in building a healthy work environment and to identify strengths and areas for improvement in supporting their workforce. The Assessment Tool is grounded in the idea that self-care is a collective responsibility that requires shared agreement and buy-in from all employees. This commitment is not static; rather, it is an ongoing learning process that needs to be thoughtfully planned and practiced while responding to lessons learned along the way.

Benefits of organizational self-care

Employee health and satisfaction are foundational for health centers to continue their important role in serving the community. Adopting organizational self-care practices can have a positive impact in helping organizations meet their values-based mission, especially when aligned with strategic goals and policies. The benefits can include increased employee well-being and job satisfaction, reduced absences and staff turnover, improved organizational effectiveness, enhanced delivery of quality care, and strengthened financial sustainability.

How to Use the Assessment Tool

The Organizational Self-Care Assessment Tool is organized into five sections: 1) Organizational Policies and Practices; 2) Employee Supervision and Mentoring; 3) Training and Professional Development; 4) Organizational Leadership and Structure; and 5) Organizational Sustainability.

Each section contains a set of measures to help assess what your health center or organization is currently doing to support self-care.

The user will respond with either a “yes” or “no” answer to each question. Upon completion of the questions, the user can then review their responses by listing them under the Assessment Findings section and consider what is working well and areas for improvement, as well as identify the reasons why some practices have not yet been implemented. The Assessment Tool is designed to give the user a snapshot of their organizational self-care practices, reflect on the responses, and identify areas they are interested in exploring. Furthermore, upon analyzing the responses, the user can prioritize areas that can feasibly be implemented and outline barriers or challenges that may come up.

For additional support, it is recommended to refer to HOP’s resource titled [“Organizational Self-Care: Addressing the Collective Responsibility for Your Employees’ Well-being.”](#)

Using the term “self-care”



Please note that HOP recognizes that there is ongoing discussion about the use of the term “self-care,” as its overuse results in often associating it as a practice of overindulgence and individualism. As a result, it can be easy to forget its original intention of caring and prioritizing one’s well-being and may distract from the need to build a culture of well-being and worker-focused environments.

HOP does not believe the term “self-care” is the problem by itself, but that it may not fully capture why individuals need structural changes and collective approaches to build resiliency and support their overall well-being. Therefore, at this moment, we use the term “organizational self-care” to emphasize building organizational structures that work alongside individual self-care practices

KEY TERMINOLOGY

- **Burnout:** is a state of emotional, mental, and physical exhaustion caused by excessive and prolonged stress.[1]
- **Compassion Fatigue:** is a condition characterized by the gradual lessening of compassion over time due to the ongoing stress of care and giving from work performed on a regular basis.[2]
- **Mental health:** Mental health includes our emotional, psychological, and social well-being. It affects how we think, feel, and act, and helps determine how we handle stress, relate to others, and make choices.[3] Mental health is more than the absence of mental disorders, but enables people to cope with the stresses of life, realize their abilities, learn well and work well, and contribute to their community and is crucial to personal, community and socio-economic development.[4]
- **Organizational Self-Care:** is an approach that moves beyond self-care as an individual practice to accepting it as a collective responsibility. Leadership, in partnership with team members, develops policies and procedures that create a healthy and welcoming work environment. By moving away from self-care as an individual practice, organizations create systems of support that build self-efficacy for employees to engage in self-care practices. A commitment to organizational self-care demonstrates an explicit recognition and respect for the workforce and reflects your organizational values.
- **Retention rate:** measures the percentage of employees that stay at your organization over a specific period of time. It complements your turnover rate by providing a more complete view of employee transition than calculating either metric alone.[5]
- **Self-care*:** is any activity done voluntarily to help maintain physical, mental or emotional health. Practicing self-care can be simple and over time have a significant impact on one's overall health and well-being.
- **Staff satisfaction survey:** is a tool used by organizations to assess the contentment of their employee related to their job, leadership, coworkers, work culture, and overall organization. Satisfaction is tied to elements such as compensation, benefits, recognition, work-life balance, workload, company culture, effective leadership, etc. [6]
- **Turnover rate:** defined as the percentage of employees who leave an organization during a certain period of time. The employee turnover rate is a metric of the effectiveness of the human resources management system and the overall management of an organization.[7]
- **Well-being:** is a positive outcome that is meaningful for people and for many sectors of society, because it tells us that people perceive that their lives are going well. Measuring well-being consists of factoring in both the people's living conditions and how people feel positive emotions, have quality relationships, and overall satisfaction with their lives. [8]

[1] Burnout Prevention and Recovery. Retrieved from <https://www.helpguide.org/articles/stress/burnout-prevention-and-recovery.htm>

[2] Compassion Fatigue Awareness Project. What is Compassion Fatigue? Retrieved from <http://www.compassionfatigue.org/pages/compassionfatigue.html>

[3] SAMHSA. What is mental health? <https://www.samhsa.gov/mental-health>

[4] WHO. Mental Health. Retrieved from <https://www.who.int/news-room/fact-sheets/detail/mental-health-strengthening-our-response>

[5] PeopleKeep. What does retention rate mean? <https://www.peoplekeep.com/blog/how-to-calculate-hr-employee-retention-rates>

[6] SurveyMonkey. Employee Satisfaction Surveys. Retrieved from <https://www.surveymonkey.com/mp/employee-satisfaction-surveys/>

[7] Workable. How to calculate employee turnover rate. Retrieved from <https://resources.workable.com/tutorial/calculate-employee-turnover-rate>

[8] Centers for Disease Control and Prevention (CDC). Well-being Concepts. Retrieved from <https://www.cdc.gov/hrqol/well-being.htm>

ORGANIZATIONAL SELF-CARE ASSESSMENT TOOL

1

ORGANIZATIONAL POLICIES AND PRACTICES

Policies refer to the rules, principles, and guidelines that have been agreed upon by the organization to set up a system of organizational self-care. Practices refer to the behavior and actions used to create a culture of self-care.

Our health center or organization:	YES	NO
• Has a self-care statement that is posted in visible areas and provided a copy to each employee	<input type="checkbox"/>	<input type="checkbox"/>
• Defines sick days to include both physical and mental health	<input type="checkbox"/>	<input type="checkbox"/>
• Developed collectively a self-care statement that derived from the input of employees	<input type="checkbox"/>	<input type="checkbox"/>
• Solicits ideas from employees on how to integrate self-care practices into their workday	<input type="checkbox"/>	<input type="checkbox"/>
• Provides adequate vacation, sick days, and personal time off and encourages staff to regularly use this time	<input type="checkbox"/>	<input type="checkbox"/>
• Regularly conducts staff satisfaction surveys	<input type="checkbox"/>	<input type="checkbox"/>
• Applies learnings from staff satisfaction surveys to make improvements	<input type="checkbox"/>	<input type="checkbox"/>
• Has a system in place to address workplace issues and grievances that is fair, confidential, and prevents retaliation	<input type="checkbox"/>	<input type="checkbox"/>

2

EMPLOYEE SUPERVISION AND MENTORING

Supporting your employees consist of providing clear expectations, defined roles and responsibilities, and leadership and team members that are motivated, engaged, and invested in the success of each other and the organization. Mentoring seeks to build on the strengths of individuals and identify growth areas.

Our health center or organization:	YES	NO
• Provides job descriptions and clearly defined roles and responsibilities	<input type="checkbox"/>	<input type="checkbox"/>
• Requires supervision with the intention to provide support and mentoring	<input type="checkbox"/>	<input type="checkbox"/>
• Integrates assessing stress, burnout, workload management, and self-care strategies as part of supervision	<input type="checkbox"/>	<input type="checkbox"/>
• Encourages taking breaks, eating lunch away from the desk or worksite, and using paid time off	<input type="checkbox"/>	<input type="checkbox"/>
• Trains managers and supervisors to be able to assess and address burnout and stress for employees	<input type="checkbox"/>	<input type="checkbox"/>
• Equips managers and supervisors with resources or training to be a mentor/coach to their direct reports	<input type="checkbox"/>	<input type="checkbox"/>

3

TRAINING AND PROFESSIONAL DEVELOPMENT

Providing training opportunities for your employees can equip them for their job and responsibilities, bolster their skills and knowledge, and contribute to the growth and success of your organization. Professional development demonstrates the organization's investment in employees and can foster their confidence in their work and lead to higher job satisfaction, employee performance and productivity, and overall morale.

Our health center or organization:	YES	NO
• Provides training opportunities on identifying signs of burnout, compassion fatigue, and secondary trauma	<input type="checkbox"/>	<input type="checkbox"/>
• Provides training opportunities on stress management	<input type="checkbox"/>	<input type="checkbox"/>
• Offers training and mentorship related to the tasks of their job	<input type="checkbox"/>	<input type="checkbox"/>
• Outlines defined steps necessary to advance in your work and career	<input type="checkbox"/>	<input type="checkbox"/>
• Provides continued professional development opportunities	<input type="checkbox"/>	<input type="checkbox"/>
• Develops a professional development plan annually with each employee to encourage growth and retention	<input type="checkbox"/>	<input type="checkbox"/>

4

ORGANIZATIONAL LEADERSHIP AND STRUCTURE

Effective leadership engages and motivates employees while establishing a positive and welcoming working environment. Employees are more likely to trust and feel connected to their workplace when they feel that leadership views their wellness as integral to the success of the organization. A good organizational structure fosters achievement and success while allowing the employee to show up as a whole person.

Our health center or organization:	YES	NO
• Has leadership that is trained in the key elements of organizational self-care	<input type="checkbox"/>	<input type="checkbox"/>
• Has leadership that models self-care to set norms and encourage healthy practices	<input type="checkbox"/>	<input type="checkbox"/>
• Has supervisory structure that supports employee wellness and professional growth and solicits employee input	<input type="checkbox"/>	<input type="checkbox"/>
• Assigns an appropriate amount of work to employees in a fair manner	<input type="checkbox"/>	<input type="checkbox"/>
• Structures work schedules so that employees have time to take breaks and reset	<input type="checkbox"/>	<input type="checkbox"/>
• Has a leadership that communicates regularly in a clear and transparent manner	<input type="checkbox"/>	<input type="checkbox"/>
• Provides opportunities for team-building among employees	<input type="checkbox"/>	<input type="checkbox"/>
• Provides a physical work environment that is well-maintained and secure, and staff is equipped with the materials and equipment necessary to do their jobs	<input type="checkbox"/>	<input type="checkbox"/>

5

ORGANIZATIONAL SUSTAINABILITY

Organizations strive to attract and retain engaged and motivated employees, while putting in place retention strategies. High turnover rates are costly for business, including loss of knowledge and expertise, impact reputation, and affect employee morale. Identifying the root causes of high turnover is crucial for financial and organizational sustainability.

Our health center or organization:	YES	NO
<ul style="list-style-type: none"> • Has a high retention rate (calculate your retention rate here) 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Has a low turnover rate (calculate your turnover rate here) 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Monitors its rates of retention and turnover 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • Uses the data to identify the causes and make changes, as needed 	<input type="checkbox"/>	<input type="checkbox"/>

ASSESSMENT FINDINGS

Review the answers to the questions, and then answer the guiding questions below. Consider the strengths and areas of improvement for your current practices. Identify the reasons why other organizational self-care practices have not been implemented.

The results of the assessment provide a snapshot of your organizational self-care practices and can help to identify areas of interest to further explore, prioritize, and implement. By understanding how your health center or organization is currently doing, you can begin to think about ways to further create a healthier work environment that supports both individual and organizational self-care.

Questions for Consideration	Responses
<p>1. How effectively is my health center or organization engaging in organizational self-care?</p>	
<p>2. Which area(s) have we been actively practicing? What makes them effective? Or not effective?</p>	
<p>3. Which area(s) have we not been doing? Why?</p>	
<p>4. What are some areas that are feasible to implement? What areas are not feasible?</p>	
<p>5. What are some barriers and challenges to implementing these practices?</p>	

RESOURCES

ORGANIZATIONAL SUSTAINABILITY

- **Retention rate:** [How to calculate your employee retention rate](#). This article from PeopleKeep explains how to calculate your retention rate and also offers examples of practices used to improve employee retention.
- **Turnover rate:** [How to calculate your employee turnover rate](#). This tutorial from Workable explains how to calculate and analyze your turnover rate.



STAFF SATISFACTION SURVEY

- **Gallup Q12 Survey:** This survey from Gallup is a 12-question employee engagement survey, called the Q12, is based on decades of research on human nature and performance.
- **Staff Satisfaction Survey:** This is a sample survey from Health Outreach Partners that can be used to collect information from your employees.



WELL-BEING CONCEPTS

The HealthRelated Quality of Life (HRQOL) program in CDC's Division of Population Health identified measures related to quality of life and well-being, and explains how public health efforts can be more expansive and more meaningful by integrating HRQOL measures to ensure better physical and mental health outcomes.



THE IMPORTANCE OF SELF-CARE FOR PRODUCTIVITY AT WORK

This article explains the connection between self-care and productivity at work, including providing some tips on how leaders can navigate self-care for themselves and their employees.



HRSA HEALTH CENTER WORKFORCE WELL-BEING INITIATIVE

The Health Resources and Services Administration (HRSA) supported initiative on workforce well-being consists of resources to support health centers in preventing or reducing burnout and promoting resiliency.



RESOURCE

[Organizational Self-Care: Addressing the Collective Responsibility for Your Employees' Wellbeing.](#) The purpose of this resource is to support health center organizations in their journey toward equitable organizational self-care practices in order to foster a work environment that supports staff satisfaction and retention. This resource is a guide for both leadership and staff to develop self-care practices at health centers.

WEBINAR

[Organizational Self-Care: Creating a Culture of Self-Care at your Organization.](#) In this 60-minute webinar, HOP provides an overview of individual and organizational self-care frameworks and highlights resources available to support health centers adopt practices that encourage staff wellbeing, satisfaction, and retention

LEARNING COLLABORATIVE SERIES

HOP's Organizational Self-Care Learning Collaborative consisted of four sessions for health center participants to learn more about self-care principles and how they can be implemented in the workspace to ensure staff satisfaction and retention and enhance health centers' wellness culture.

- Session #1: [Defining the Impact of Stress, Burnout, and Compassion Fatigue on Health Center Staff](#)
 - Session #2: [What are Self-care, Staff Satisfaction, Organizational Self-care, and Best Self-care Practices](#)
 - Session #3: [Organizational Self-Care Policy/Best Practices/Implementation, and A Framework to Guide an Inclusive Self-Care Culture](#)
 - Session #4: [Creating a Success Plan and the Assessment Tool](#)
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RESOURCE

[Self-Care: Taking Care of Ourselves So We Can Take Care of Others.](#) Outreach programs support health centers to provide quality and responsive services to underserved communities by connecting to individuals where they live, work, and spend time. However, this level of access to and trust with the community can be challenging and overwhelming. HOP supports practicing self-care as an effective way for individuals and health centers to foster a healthy work-life balance. With input solicited from outreach workers across the country, HOP developed this resource to share self-care practices, its benefits, and strategies to build a culture of self-care that supports staff health and well-being and helps health centers recruit, motivate, support, and retain staff.



About Health Outreach Partners

Health Outreach Partners (HOP) was founded in 1970 as a small direct-service program supplying rural, isolated communities with outreach workers along the East Coast. It continued expanding its staff to meet the increasing demands of numerous communities along the Eastern seaboard until January 2001. In 2001, HOP leveraged its 31 years of direct service and transitioned into a multi-tiered national training and technical assistance provider. Today, HOP works with health centers and other community-based health organizations across the country to strengthen outreach services, expand access to care, and ultimately improve quality of life for vulnerable and underserved communities.

Health Outreach Partners' mission is to build strong, effective, and sustainable grassroots health models by partnering with local community-based organizations across the country in order to improve the quality of life of low-income, vulnerable, and underserved populations.

Learn more at www.outreach-partners.org



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