

Thank you for taking the time to complete this self-assessment, which will highlight key focus areas to ensure your organization's workforce program is at its strongest. To start, tell us a bit about yourself.

WORKFORCE TTA SELF-ASSESSMENT

First Name *

Last Name *

Email *

Phone

City *

State *

Organization Name *

Organization Type (check all that apply) *

- ☐ Health Center Program Grantee
- ☐ FQHC - Migrant
- ☐ FQHC - Homeless
- ☐ FQHC - Public Housing
- ☐ FQHC Look-Alike
- ☐ Tribal
- ☐ Other

List any other team members who are completing this tool with you:

Current Staff

Tell us about your current staffing situation. For the purposes of this assessment, staff categories are as follows:

Leadership Team is your C-Suite and other executive members of your health center.

Non-Provider Staff are any employees that are not billed as providers. This may include members of the general care team.

Non-Physician Providers are any providers that are not physicians of any specialty. This would include providers such as Nurse Practitioners, Physician Assistants, Certified Nurse Midwives, and more.

Physician/Dentist Staff are physicians of any specialty who are employed by your health center.

	Current FTE	FTE Vacancy
Leadership Team	<input type="text"/>	<input type="text"/>
Non-Provider Staff	<input type="text"/>	<input type="text"/>
Non-Physician Provider Staff	<input type="text"/>	<input type="text"/>
Physician/Dentist Staff	<input type="text"/>	<input type="text"/>

LEADERSHIP INVESTMENT

Understanding leadership investment in workforce issues. Workforce issues are anything related to recruitment and retention of health center employees, including workforce strategic planning.

Workforce Team

1. How many Full Time Equivalents (FTEs) are dedicated to addressing workforce issues? *

- ☐ Less than 1 FTE
- ☐ 1 FTE
- ☐ Between 1-3 FTE
- ☐ Between 3 and 6 FTE
- ☐ More than 6 FTE

2. Which staff are part of the team that thinks about and addresses workforce issues at your organization? (select all that apply) *

- ☐ Chief Executive Officer
- ☐ Chief Operations Officer
- ☐ Chief Financial Officer
- ☐ Chief Medical Officer
- ☐ Chief Workforce Officer
- ☐ Human Resources Director
- ☐ Human Resources Staff
- ☐ Recruiter
- ☐ Site Managers/Directors
- ☐ Other (please specify)

3. How do your workforce team members learn more about recruitment, retention, and staffing issues and solutions? Trainings can be in-person, web-based, or self-paced. *

- ☐ Attend internal HR-focused trainings
- ☐ Attend external health center workforce-focused trainings
- ☐ Attend Primary Care Association trainings
- ☐ Attend national trainings from Bureau of Primary Health Care partners
- ☐ Our workforce team does not regularly attend these types of trainings
- ☐ Other (please specify)

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Data-Informed Workforce Plan

Understanding the data collection and strategic planning efforts around your workforce.

Workforce Metrics

4. Which organizational metrics do you currently collect and analyze to inform your workforce planning? (select all that apply) *

- ☐ Salary Compared to Local Marketplace
- ☐ Visits per Full Time Equivalent (FTE) per Discipline
- ☐ Clinical Support Ratios
- ☐ Full-Time vs. Part-Time Staffing Ratios (How many staff are working full-time versus part-time?)
- ☐ National Health Service Corps Utilization by Discipline (What percentage of your current clinicians participate in NHSC programs?)
- ☐ Percent Non-Physician Providers
- ☐ Percent of Staff Within 3 Years of Retirement
- ☐ Something Not on This List
- ☐ None

5. Which HR metrics do you currently collect and analyze to inform your workforce planning? (select all that apply) *

- ☐ Tenure
- ☐ Revenue per Employee
- ☐ Cost of Benefits per Employee
- ☐ Absence Rate
- ☐ Burnout Metrics (using any tool available)
- ☐ Turnover
- ☐ Time to Fill
- ☐ Cost per Hire
- ☐ Something Not on This List
- ☐ None

6. Which partner data do you currently collect and analyze to inform your workforce planning? (select all that apply) *

- ☐ Competitor Plans (Any information on their plans to expand change focus or otherwise impact your clear road to recruitment and retention)
- ☐ Funder Plans (Lists and dates of potential opportunities for funding related to your recruitment and retention strategies)
- ☐ Community Partner Priorities (Information about strategic initiatives regulatory changes or other data to consider.)
- ☐ Community Change Information (Statistics on anticipated changes in the population related to number demographics and potential needs that could affect your staffing strategy.)
- ☐ Something not on this list
- ☐ None

7. How often do you collect health center staff satisfaction OR staff engagement data? *

- More often than every 6 months
- Every 6 months
- Annually
- Every two years
- Every three years
- Rarely
- Never

Strategic Planning

8. Indicate the level of information available regarding your organization's strategic planning efforts. Select the statement that is most true: *

- Our organization has not conducted strategic planning activities during the last three years.
- Our organization has conducted strategic planning activities in the last three years but workforce issues were never addressed
- Our organization has conducted strategic planning activities in the last three years during which workforce issues were raised but have been put off
- Our organization has conducted strategic planning and has a defined objective for training health centers on recruiting and retaining workforce as part of our overall strategic plan

9. Which recruitment and retention issues impact your workforce planning? *

- Quality of public elementary and secondary schools
- Availability of quality housing
- Income potential
- Employment opportunities for partner
- Availability of relief coverage for vacations, holidays, and family emergencies
- Availability of practice partners and consulting specialist
- None of these
- Other (please specify)

10. Do you have a written staffing plan that identifies recruitment and retention priorities for the next 3 years? *

- Yes
- No

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Tested Recruitment and Retention Strategies

Understanding how your organization approaches recruitment and retention processes.

Recruitment

11. Does your organization provide trainings on your state's J-1 Visa Waiver Program? *

- ☐ Yes, we currently do
- ☐ We used to, but don't anymore
- ☐ No

12. Does your organization have a written recruitment plan? *

- ☐ Yes, for all types of positions, including providers
- ☐ Yes, for providers only
- ☐ No

13. How often do you update your recruitment plan? *

- ☐ Annually
- ☐ Every 2-3 Years
- ☐ Every 4-5 Years
- ☐ More than 5 Years
- ☐ Never
- ☐ Unsure

14. Does your recruitment plan include details on the Role of Community? *

- ☐ Yes
- ☐ No

15. Does your recruitment plan include details on Recruitment Budget? *

- ☐ Yes
- ☐ No

16. Does your recruitment plan include Use of Professional Recruitment Service? *

- ☐ Yes
- ☐ No

17. Does your recruitment plan include details on Advertising? *

- ☐ Yes
- ☐ No

18. If advertising is included in your plan, select all components that are included *

- ☐ Written ad including community and location background and highlights
- ☐ Media Outlets (local news outlets magazines medical journals etc.)
- ☐ Strategies for Use of Social Media
- ☐ Connections to Professional Societies
- ☐ Connections to schools or training programs
- ☐ Our advertising section does not include these components

19. Does your recruitment plan include details on the Screening Process? *

- ☐ Yes
- ☐ No

20. Does your recruitment plan include details on the Interview Process? *

- ☐ Yes
- ☐ No

21. If interview process is included in your plan, select all components that are included *

- ☐ Telephone Interview
- ☐ In-Person Interview
- ☐ Interview Visit Accommodations
- ☐ Interview Visit Entertainment
- ☐ Interview Visit Social Dinner or Event
- ☐ Interview Visit Interviewer Team
- ☐ Interview Visit Community Engagement
- ☐ Our interview section does not include these components

22. Does your recruitment plan include details on the Follow-Up Process? *

- ☐ Yes
- ☐ No

23. If follow-up is included in your plan, select all components that are included *

- ☐ Frequency
- ☐ Timeline
- ☐ Interview Visit Type of Contact (phone email mailing etc.)
- ☐ Person Responsible
- ☐ Our follow-up section does not include these components

Retention

24. Does your organization have a written retention plan? ^{*}

- ☐ Yes, for all types of positions, including providers
- ☐ Yes, for providers only
- ☐ No

25. How often do you update your retention plan? ^{*}

- ☐ Annually
- ☐ Every 2-3 Years
- ☐ Every 4-5 Years
- ☐ More than 5 Years
- ☐ Never
- ☐ Unsure

26. Please select the details included in your sample retention plan (check all that apply)

- ☐ Holding regular progress evaluation meetings to discuss morale and professional satisfaction concerns and issues
- ☐ Sponsoring periodic social gatherings
- ☐ Providing time, financial, and/or administrative support for mentorship
- ☐ Funding career and personal development opportunities
- ☐ Providing opportunities for peer expert interaction outside the community, through telecommunications or other efforts
- ☐ Supporting other volunteer and community service efforts
- ☐ Our retention plan does not include any of these elements
- ☐ Other (please specify)

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Equitable and Effective Compensation Structure

Understanding how your organization approaches staff compensation.

Compensation Structure

27. How often does the board of directors review the compensation structure? *

- ☐ More than once a year
- ☐ Annually
- ☐ Every 2 - 3 Years
- ☐ Every 4 - 6 years
- ☐ Rarely
- ☐ Never
- ☐ Unsure

28. How does leadership communicate about total compensation to all staff? (select all that apply) *

- ☐ Annual benefits review meeting
- ☐ Annual newsletter or other written communication
- ☐ Part of agenda at staff meetings more than once per year
- ☐ Part of annual performance review process
- ☐ This is not something our leadership team does
- ☐ Other (please specify)

29. Does the organization have salary bands/ranges for each position? *

- ☐ Yes, for all staff positions
- ☐ Yes, for some types of staff
- ☐ No

30. How often does the organization review and/or adjust base salaries? *

- ☐ Annually
- ☐ Every other year
- ☐ Every 3 - 5 years
- ☐ Rarely
- ☐ Never

31. What are the components of the benefits package for full-time staff? *

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Physician/Dentist Staff are physicians of any specialty who are employed by your health center.

	Non-Provider Staff	Non-Physician Provider	Physician/Dentist	Leadership Team
Vacation Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sick Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holidays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educational Conference or Other Required Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dental Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disability Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Non-Provider Staff

32. How does the organization determine starting salaries for all non-provider staff? *

- ☐ We have a standard rate based on previous experience/other qualifications
- ☐ Whatever the base rate is for that staff type for that year
- ☐ Whatever the staff can negotiate
- ☐ Other (specify)

33. How can an employee earn more than their base salary each year? *

- ☐ Annual Raises
- ☐ Performance Bonuses
- ☐ End-of-Year Bonuses
- ☐ Recruitment Bonus
- ☐ Other (please specify)

34. What additional benefits are highly rated by employees? (examples: Casual Fridays, employee awards, retention bonuses, flexible schedules, remote work options, etc.)

Provider Staff

35. Does the organization participate in any loan repayment programs (e.g. National Health Service Corps, state Loan Repayment, etc.)? (select all that apply) *

- ☐ National Health Service Corps (including Loan Repayment NURSE Corps etc.)
- ☐ Other Federal Loan Repayment Programs
- ☐ State Loan Repayment Programs
- ☐ None at this time
- ☐ Other (please specify)

36. How does the organization determine starting salaries for provider staff? *

- ☐ We have a standard rate based on previous experience
- ☐ Whatever is the standard base for that year
- ☐ Whatever the provider can negotiate
- ☐ Other (please specify)

37. Do your non-physician providers and your physician providers work under the same compensation model? Model examples would be incentives for production, quality, administrative tasks, or patient satisfaction; straight salary; annual bonuses, etc. *

- ☐ Yes
- ☐ Not currently, but we are working on it
- ☐ No

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Positive, Engaged Culture

Understanding how different parts of your organization's structure and values help develop a consistent culture of engagement.

Engagement

38. How does your organization recognize staff for personal and professional achievements? (select all that apply) *

- ☐ Organization-wide awards
- ☐ Site-specific awards
- ☐ Team awards
- ☐ Annual recognition event
- ☐ Special privileges
- ☐ We do not formally recognize staff
- ☐ Other (please specify)

39. How do you regularly communicate about organizational successes related to the mission? (select all that apply) *

- ☐ Organization-wide newsletter
- ☐ Time dedicated in staff meetings
- ☐ Emails to staff
- ☐ Social Media
- ☐ We do not communicate organizational successes internally
- ☐ Other (please specify)

40. Finish this sentence with the phrase that is most true for your health center: The organization's hiring and training processes... *

- ☐ Focus only on the narrowly defined functions and requirements of each position.
- ☐ Reflect how potential hires will affect the culture and the balance of teams.
- ☐ Place a priority on the ability of new and existing staff to improve care and the office environment.
- ☐ Support and sustain improvements in care and culture through training and incentives.

41. Select the statement that most applies for each type of staff: *

	Non-Clinical Staff	Provider Staff	Leadership
Part-time schedules are available (part-time or job sharing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexible schedules are available (school hours, evenings, weekends)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

42. Do you have a plan in place for employees experiencing burnout? *

- ☐ Yes, we have a standard plan
- ☐ Yes, we make personalized plans as necessary
- ☐ No
- ☐ Unsure

Professional Development

43. Does your organization help staff with career development? *

- ☐ Yes, we have a standard career development plan by staff type
- ☐ Yes, we develop a customized development plan for each person
- ☐ Nothing formal, but we discuss it
- ☐ No

44. What ongoing training opportunities do you offer staff? (select all that apply) *

- ☐ Funding and/or time for Continuing Education
- ☐ Funding and/or Time for Research Projects
- ☐ Job-Specific Certification
- ☐ Project ECHO through any university or health center partner
- ☐ Subscriptions to Journals
- ☐ Sabbaticals
- ☐ Tuition Reimbursement
- ☐ Training on Culturally and Linguistically Appropriate Standards
- ☐ Funding and/or time to participate in non-CE training programs (e.g. leadership training)
- ☐ Preceptor Training
- ☐ None of these
- ☐ Other (please specify)

Provider Practice Experience

45. On average, how many days per month are providers on-call for care coverage?

46. Do providers cover regular office hours on evenings and weekends? *

- ☐ Yes
- ☐ No
- ☐ Depends on the site

47. When did your organization last make a major change to your Electronic Health Record system? A major change could include changing EHR systems, updating technology, changing workflows, etc. *

- ☐ Within the last year
- ☐ 1-2 years ago
- ☐ 3-5 years ago
- ☐ More than 5 years ago

48. Select the sentence that best describes your organization's services: *

- ☐ We have full medical, oral health, and behavioral health integration.
- ☐ Our medical, oral health, and behavioral health services are co-located and have some features of integration.
- ☐ Some of our services are integrated or co-located, but not all types of services.
- ☐ We are interested in service integration but have not yet made any transitions.
- ☐ Service integration is not a priority at this time.

Staff Resiliency & Burnout Prevention

49. Does your organization have a formal resiliency and wellness plan? *

- ☐ Yes, we have a robust plan.
- ☐ Yes, we have a fine plan.
- ☐ Nothing formal, but we prioritize employee wellness.
- ☐ We do not have a plan but we are working on making one.
- ☐ We do not have a plan and do not anticipate creating one anytime soon

50. Does your organization create space for employee self-care? *

- ☐ Yes, we have opportunities around and information on employee self-care. This is an organizational priority.
- ☐ Sort of - employees are encouraged to care for themselves as much as possible.
- ☐ No, but we hope to work on this in the future.
- ☐ No, this is not an organizational priority at this time.

51. Is the importance of resiliency, organizationally-supported self-care, and mental health communicated regularly to managers at all levels? *

- ☐ Yes, we communicate about this with managers on a regular basis.
- ☐ Yes, we communicate about this with managers when it comes up.
- ☐ Sort of - we have communicated about it a few times with managers.
- ☐ No, but we hope to communicate about it more in the future.
- ☐ No, this is not an organizational priority at this time.

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Diversity, Equity, Inclusion, & Cultural Respect

Understanding your organization's approach to diversity, equity, inclusion, and cultural respect.

52. Our organizational mission, vision, and/or values demonstrate a commitment to justice, equity, diversity, and inclusion (JEDI). Select the statement that is most true: *

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly Disagree

53. We have data on the demographic makeup of our workforce. Select the statement that is most true: *

- ☐ Yes, we have current and robust demographics data for our workforce
- ☐ Yes, we have a basic understanding of the demographics of our workforce
- ☐ Not exactly but we're attempting to gather the data
- ☐ Not really, and we struggle to change this
- ☐ No, and it is not a priority

54. The racial and ethnic composition of our organization's staff reflect the population we serve. *

- ☐ Yes, and we monitor this closely
- ☐ Yes, it is just worked out this way
- ☐ Not exactly, but we are attempting to address this
- ☐ Not really, and we struggle to change this
- ☐ No, and it is not a priority

55. What policies and/or procedures does your organization have to address bias and discrimination in the hiring process? (select all that apply) *

- ☐ Formal training on these issues for all staff
- ☐ Inclusive outreach to potential new hires
- ☐ Vetted interview questions
- ☐ Develop current diverse talent to participate in the process
- ☐ Build community partnerships for ongoing engagement on these issues
- ☐ None at this time
- ☐ Other (please specify)

56. Select the statement that best describes your organization's policies that address discrimination. *

- ☐ We have policies and plans for discrimination within the organization as well as between employees and patients.
- ☐ We have policies and plans for discrimination between within the organization OR between employees and patients
- ☐ We have a general statement against discrimination
- ☐ We do not have anything formally written at this time.

57. Select the statement that best describes your organization. *

- ☐ Our organization both formally and informally defines diversity, equity, inclusion, and cultural respect as a high priority.
- ☐ Our organization informally highlights diversity, equity, inclusion, and cultural respect through occasional trainings and diverse hires.
- ☐ Our organization passively addresses diversity, equity, inclusion, and cultural respect.
- ☐ Our organization has not identified diversity, equity, inclusion, and cultural respect as a core values.

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High-Functioning Managers

Understanding the role managers play in making a successful organization.

58. Does your organization have a formal training program for managers? *

- ☐ Yes, when they first become supervisors/are hired
- ☐ Yes, it's ongoing skill development
- ☐ Nothing formal
- ☐ No
- ☐ Unsure

59. Is retention an official part of all managers' jobs? *

- ☐ Yes, and we have associated metrics
- ☐ Yes, but there are no formal methods for accountability
- ☐ No

60. What metrics do you use for determining a manager's effectiveness? (select all that apply) *

- ☐ Turnover rates
- ☐ Tenure rates
- ☐ Staff feedback
- ☐ Transfers within the organization
- ☐ Career advancement of those they supervise
- ☐ None right now
- ☐ Other (please specify)

61. What resources do managers have to support communication among and between the organization's leadership and the staff they supervise? *

- ☐ Regular peer meetings with other managers
- ☐ Dedicated time to ask questions and discuss issues with the leadership team
- ☐ Administrative time for one-on-ones with the staff they supervise
- ☐ Opportunity to plan staff meetings
- ☐ Other (please specify)

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Health Professions Training

Understanding how your organization trains emerging health professionals.

Training Students

This section will focus specifically on training health professions students. "Students" here are defined as those who are still receiving formal education and are not yet residents or post-graduates. Later sections will cover those other types of trainees.

62. Does your organization train health professions students at one or more of its sites? *

- ☐ Yes
- ☐ No
- ☐ Unsure

63. About how many students are trained at your health center each year?

64. Please indicate the type of students that your health center trained in the last 12 months. (select all that apply) *

- ☐ Allopathic/Osteopathic (MD/DO) Medical Student
- ☐ Nurse Practitioner
- ☐ Certified Nurse Midwife or License Nurse Midwife
- ☐ Physician Assistant
- ☐ Registered Nurse
- ☐ Licensed Practical Nurse
- ☐ Medical Assistant
- ☐ Dentist
- ☐ Dental Hygienist
- ☐ Dental Assistant
- ☐ Dental Therapist
- ☐ Pharmacist
- ☐ Psychologist
- ☐ Social Worker
- ☐ Community Health Worker
- ☐ Other (please specify)

65. Does your organization train post-graduate health professionals at one or more of its sites? *

- ☐ Yes
- ☐ No
- ☐ Unsure

66. About how many post-graduate health professionals are trained at your health center each year?

67. Please indicate the type of post-graduate health professionals that your health center trained during the last 12 months. (select all that apply) *

- ☐ Nurse Practitioner
- ☐ Certified Nurse Midwife or License Nurse Midwife
- ☐ Other Advanced Practice Nurse
- ☐ Pharmacist
- ☐ Physician Assistant
- ☐ Psychologist
- ☐ Licensed Clinical Social Worker
- ☐ Dentist
- ☐ Optometrist
- ☐ Other (please specify)

Training Physician Residents

These physician residents have graduated from an osteopathic or allopathic medical school (DO/MD) and are participating in formal residency training.

68. Does your organization train physician residents at one or more of its sites? *

- ☐ Yes
- ☐ No
- ☐ Unsure

69. About how many physician residents are trained at your health center each year?

70. Please indicate which type(s) of primary care physician residents are trained at your health center (select all that apply) *

- ☐ Family Medicine
- ☐ Internal Medicine
- ☐ Pediatrics
- ☐ Obstetrics and Gynecology
- ☐ Psychiatry
- ☐ Geriatrics
- ☐ Adolescent Medicine
- ☐ Other (please specify)

Impact

71. Which partners do you work with to provide health professions training? (select all that apply) *

- ☐ University or State-Supported College
- ☐ For-Profit Training Institute
- ☐ Area Health Education Center
- ☐ Primary Care Association
- ☐ None
- ☐ We have no programs
- ☐ Other (please specify)

Training Students from Minority-Serving Institutions

72. Do you partner with any Minority Serving Institutions? *

- ☐ Yes, we purposefully partner with one or more Minority-Serving Institutions or one or more health professions education programs at Minority-Serving Institutions to
- ☐ We recruit or occasionally train students from Minority-Serving Institutions, but have no formal partnership.
- ☐ No, but we are working to establish such a partnership.
- ☐ No, and we do not foresee establishing such a partnership.

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One Last Question!

73. Is there anything else you would like us to know about your workforce efforts? You can also use this space to clarify any of your answers from the assessment.

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