

# Workforce Retention Diagnostic Tool

A research-informed self-assessment for human services organizational leaders

Developed by Lee Williams, MSOL | Lee Williams LLC | iamleewilliams.com



## PURPOSE AND RESEARCH FOUNDATION

This diagnostic is grounded in Social Exchange Theory (Blau, 1964), Organizational Support Theory (Eisenberger et al., 1986), and established workforce retention research in human services contexts (Mor Barak et al., 2009; Hepworth et al., 2017). It is designed for use by executive leaders, directors, and mid-level managers seeking to identify the structural and cultural conditions that drive or diminish staff retention. The tool is applicable across frontline, supervisory, and management tiers in any human services setting.

## HOW TO COMPLETE THIS ASSESSMENT

Rate your organization on each indicator using the 1–4 scale. Scores of 1 or 2 signal structural gaps that require leadership attention. Scores of 3 or 4 indicate relative strength. Complete each section honestly — the diagnostic has the greatest value when it reflects

**RATING SCALE:** 1 Not in place 2 Emerging / inconsistent 3 Established / mostly consistent 4 Fully embedded / systemic

## S Systems Alignment 1 2 3 4

*Research basis: Eisenberger et al. (1986); Hepworth et al. (2017)*

*The degree to which organizational policies, structures, and processes actively support workforce advancement and retention rather than inadvertently obstructing them.*

<input type="checkbox"/>	Promotion and advancement criteria are clearly documented and communicated to all staff, regardless of role level.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>All staff</b>					
<input type="checkbox"/>	Compensation structures are reviewed regularly and reflect expanded responsibilities and internal role growth.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Leadership</b>					
<input type="checkbox"/>	Onboarding processes introduce career pathway options within the first 30 days of employment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>All staff</b>					
<input type="checkbox"/>	Performance management systems connect to professional development goals, not only compliance or accountability measures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Supervisors</b>					
<input type="checkbox"/>	Mid-level managers have access to the data and authority needed to respond to retention risks within their teams.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mid-management</b>					

### LEADERSHIP REFLECTION

*Which organizational policy currently creates the greatest barrier to internal advancement for staff in direct service or supervisory roles?*

**Systems Alignment Component Score (sum of 5 ratings, max 20):** score

## T Talent Recognition 1 2 3 4

*Research basis: Mor Barak et al. (2009); Gallup (2022)*

*The organizational capacity to identify, acknowledge, and invest in staff capability at every level — not only among those already in formal leadership positions.*

<input type="checkbox"/>	Supervisors and managers are explicitly trained and accountable for identifying and developing high-potential staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Supervisors</b>					
<input type="checkbox"/>	Staff in direct service roles receive individualized development conversations at least once per year.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Frontline</b>					
<input type="checkbox"/>	The organization documents and tracks capability growth beyond formal title changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Leadership</b>					
<input type="checkbox"/>	Talent recognition practices are equitable and do not disproportionately favor staff in higher-status roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>All staff</b>					
<input type="checkbox"/>	Mid-level managers are recognized for building their team's capability, not only for operational output.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mid-management</b>					

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<b>Leadership</b>	The organization documents and tracks capability growth beyond formal title changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>All staff</b>	Talent recognition practices are equitable and do not disproportionately favor staff in higher-status roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mid-management</b>	Mid-level managers are recognized for building their team's capability, not only for operational output.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**LEADERSHIP REFLECTION**  
 How would a high-performing direct service worker currently know that organizational leadership recognizes their potential for advancement?

Talent Recognition Component Score (sum of 5 ratings, max 20): score

## R Role Clarity 1 2 3 4

Research basis: Rizzo et al. (1970); Lizano & Mor Barak (2012)

The extent to which staff at all levels — frontline through management — have clear, consistent, and realistic expectations about their responsibilities, boundaries, and contributions.

<b>All staff</b>	Job descriptions accurately reflect current day-to-day responsibilities and are reviewed at least annually.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Frontline</b>	Frontline staff understand how their work contributes to broader organizational outcomes and client impact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Supervisors</b>	Supervisory expectations are documented, consistently applied, and not subject to individual manager interpretation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Leadership</b>	Role ambiguity is treated as a structural concern and addressed proactively, rather than attributed to individual performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mid-management</b>	Mid-level managers have clarity about the scope of their decision-making authority within their department.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**LEADERSHIP REFLECTION**  
 In which department or role category is role ambiguity most likely contributing to preventable staff turnover right now?

Role Clarity Component Score (sum of 5 ratings, max 20): score

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## I Internal Mobility 1 2 3 4

Research basis: Blau (1964); Selden & Sowa (2015)

The visibility, accessibility, and active promotion of career advancement pathways within the organization for staff at all levels.

<ul style="list-style-type: none"> <li><span style="color: blue;">●</span> Career ladders or advancement pathways are documented and accessible to all staff, including those in entry-level roles. <span style="background-color: #ADD8E6; border-radius: 5px; padding: 2px;">All staff</span></li> <li><span style="color: blue;">●</span> Internal job postings are communicated to current employees before or concurrent with external recruitment. <span style="background-color: #ADD8E6; border-radius: 5px; padding: 2px;">All staff</span></li> <li><span style="color: green;">●</span> Direct service staff are actively encouraged and supported to apply for internal advancement opportunities. <span style="background-color: #90EE90; border-radius: 5px; padding: 2px;">Frontline</span></li> <li><span style="color: purple;">●</span> Promotion rates from internal candidates are tracked and reviewed by senior leadership on a recurring basis. <span style="background-color: #DDA0DD; border-radius: 5px; padding: 2px;">Leadership</span></li> <li><span style="color: blue;">●</span> Mid-level managers play an active role in preparing their direct reports for upward movement within the organization. <span style="background-color: #FF6347; border-radius: 5px; padding: 2px;">Mid-management</span></li> </ul>	<table border="0"> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </table>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**LEADERSHIP REFLECTION**  
In the past 12 months, what percentage of open supervisory or management roles were filled by internal candidates?

Internal Mobility Component Score (sum of 5 ratings, max 20): score

## D Development Infrastructure 1 2 3 4

Research basis: Bandura (1977); Cunningham et al. (2002)

The presence and equitable distribution of formal and informal learning opportunities that are explicitly connected to career advancement — not limited to compliance or licensing requirements.

<ul style="list-style-type: none"> <li><span style="color: blue;">●</span> The organization invests in professional development opportunities beyond required regulatory or compliance training. <span style="background-color: #ADD8E6; border-radius: 5px; padding: 2px;">All staff</span></li> <li><span style="color: green;">●</span> Direct service and frontline staff have access to mentorship, coaching, or structured peer learning. <span style="background-color: #90EE90; border-radius: 5px; padding: 2px;">Frontline</span></li> <li><span style="color: blue;">●</span> Development resources are equitably distributed across departments and are not concentrated at senior levels. <span style="background-color: #ADD8E6; border-radius: 5px; padding: 2px;">All staff</span></li> <li><span style="color: blue;">●</span> Leadership succession planning includes deliberate investment in building the pipeline below senior management. <span style="background-color: #DDA0DD; border-radius: 5px; padding: 2px;">Leadership</span></li> <li><span style="color: blue;">●</span> Mid-level managers receive targeted development to strengthen their supervisory and team-building capacity. <span style="background-color: #FF6347; border-radius: 5px; padding: 2px;">Mid-management</span></li> </ul>	<table border="0"> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </table>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**LEADERSHIP REFLECTION**  
What learning or development resource is currently available to a frontline staff member that could realistically accelerate their advancement within 18 months?

Development Infrastructure Component Score (sum of 5 ratings, max 20): score

## E Equity Conditions 1 2 3 4

Research basis: Mor Barak (2015); Nembhard & Edmondson (2006)

The degree to which organizational structures, practices, and cultures actively address pay equity, belonging, and representation — treating equity as a systemic leadership responsibility, not a programmatic add-on.

<ul style="list-style-type: none"> <li><span style="color: blue;">●</span> The organization conducts regular pay equity reviews disaggregated by role type, tenure, and workforce</li> </ul>	<table border="0"> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </table>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Scoring Summary and Interpretation

Component	Score	Max	Priority Area	Leader Accountable
S — Systems Alignment	_____	20	<input type="text"/>	_____
T — Talent Recognition	_____	20	<input type="text"/>	_____
R — Role Clarity	_____	20	<input type="text"/>	_____
I — Internal Mobility	_____	20	<input type="text"/>	_____
D — Development Infrastructure	_____	20	<input type="text"/>	_____
E — Equity Conditions	_____	20	<input type="text"/>	_____
<b>TOTAL SCORE</b>	_____	<b>120</b>		

### SCORE INTERPRETATION

- **100–120 — High Organizational Readiness**  
 Retention systems are structurally sound. Sustain, document, and scale what is working.
- **75–99 — Moderate Strength With Gaps**  
 Identify the two lowest-scoring components and develop a focused 90-day action plan.
- **50–74 — Significant Structural Vulnerabilities**  
 Multiple systems require redesign. Prioritize leadership accountability and policy intervention.
- **Below 50 — Critical Systemic Failure**  
 Workforce instability is structurally embedded. Executive-level intervention is required immediately.

## Recommended Next Steps

- 01 Share with your leadership team.**  
 Collective assessment surfaces blind spots that individual leaders frequently miss. Facilitate a structured debrief within 30 days of completion.
- 02 Prioritize the two lowest-scoring components.**  
 Attempting to address all six areas simultaneously dilutes organizational focus and reduces measurable impact.
- 03 Identify one structural change per priority component.**  
 Policy revision, budget reallocation, or supervisory accountability shifts produce results faster than programming or awareness campaigns alone.
- 04 Set a 90-day review checkpoint.**  
 Reassess selected indicators quarterly. Track structural change, not intent. Progress must be measurable.
- 05 Engage implementation support.**  
 The STRIDE Framework offers structured organizational consultation, leadership development, and workforce equity assessment services through Lee Williams LLC.

### SELECTED RESEARCH REFERENCES

Bandura, A. (1977). Self-efficacy: Toward a unifying theory of behavioral change. *Psychological Review*, 84(2), 191–215.  
 Blau, P. M. (1964). *Exchange and power in social life*. Wiley.