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Burnout and Moral Distress Checklist and Worksheet for Managers – SAMPLE

PURPOSE: This document is prepared for managers and supervisors to identify signs of burnout and moral distress in their employees and provide approaches to address these concerns at the institutional level. The accompanying worksheet is a template to assist in discussing these issues with staff and developing a plan when signs are noted. These resources can also be used for educational purposes.

Definitions

Burnout	A multifaceted injury related to chronic workplace stress that affects the person's well-being and quality of life.[1]

Moral Distress	Caregivers recognize the appropriate ethical action but are unable to act according to their conscience due to fear or external situations.[2]

Classic Signs of Burnout
(as measured by the Maslach Burnout Inventory)[3]

Emotional Exhaustion	Depersonalization	Reduced Accomplishment
Ongoing exhaustion in one or more of the three levels: energy, emotion, spirit	Cynicism, detachment from job duties, low empathy, silence, passivity	Questioning self, doubting if work really makes a difference, loss of purpose

Classic Signs of Moral Distress[4]

Affective Symptoms	Cognitive Symptoms	Somatic Symptoms	Behavioral Symptoms
Frustration, anger, depression, powerlessness, helpless	Loss of self-worth, loss of sense of self	Fatigue, pain, sleeplessness, heart palpitations, nightmares	Gossip, tardiness, absenteeism, distancing, violence, avoiding work

[1] World Health Organization. Burnout an "occupational phenomenon": International Classification of Diseases. Health Topics: Mental Health. May 28, 2019.

[2] McCarthy, J. & Gastmans, C. (2015). Moral distress: A review of the argument-based nursing ethics literature. *Nursing Ethics*, *22*(1), 131-152.

[3] Maslach, C.; Jackson, S.E.; Leiter, M.P. (1996–2016). *Maslach Burnout Inventory Manual (Fourth Edition)*. Menlo Park, CA: Mind Garden, Inc.

[4] National Nurse (2012). Workplace violence: Assessing occupational hazards and identifying strategies for prevention: Part I. *National Nurse*, *108*(1), 18-27.

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Impacts of Burnout and Moral Distress

Person[5][6]	Patient[7][8][9][10][11][12]	Institution[13]
Job dissatisfaction, career changes, health and mental health issues, deadened to moral issues, substance abuse, anxiety, depression	Basic care and supervision issues, missing vital tasks, medication and task errors, provider blindness, harm, hiding errors	Working around the system, unethical actions, retention issues, negative work climate, financial loss

Approaches to Addressing Burnout and Moral Distress

□ Peer support program and/or immediate intervention program (e.g., Code Lavender)	□ Employee/caregiver assistance programs/ wellness program referral	□ Debriefing critical events
□ Just culture	□ Implement micropractices into routines	□ Leadership rounds with a wellness focus
□ Adjusted work schedules or duties (consult with HR and legal)	□ Recognition programs	□ Mindfulness programs or apps

[5] Burston, A.S. & Tuckett, A.G. (2013). Moral distress in nursing: Contributing factors, outcomes and interventions. *Nursing Ethics*, *20*(3), 312-324.

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[9] McCarthy, J. & Gastmans, C. (2015). Moral distress: A review of the argument-based nursing ethics literature. *Nursing Ethics*, *22*(1), 131-152.

[10] Peleki, T.; Resmpitha, Z.; Mavraki, A.; Linardakis, M. et. al., (2015). Assessment of patients and nurses' opinions on the bidirectional communication during hospitalization: A descriptive study. *Health Science Journal*, *9*(3), 1-7.

[11] Pauly, B.M.; Varcoe, C. & Storch, J. (2012). Framing the issues: moral distress in health care. *HEC Forum*, *24*(1), 1–11.

[12] Wilson, M.A.; Goettemoeller, D.M.; Bevan, N.A. & McCord, J.M. (2013). Moral distress: levels, coping and preferred interventions in critical care and transitional care nurses. *Journal of Clinical Nursing*, *22*, 1455–1466.

[13] Burston, A.S. & Tuckett, A.G. (2013). Moral distress in nursing: Contributing factors, outcomes and interventions. *Nursing Ethics*, *20*(3), 312-324.

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Caregiver Name: _____ Department: _____

I have observed these behaviors which affect our culture of safety:_____

The impacts of these behaviors could be:

Impacts on the Caregiver	Impacts on the Patient	Impacts on the Institution

If these behaviors continue, I am concerned that:
_____

What do you think is contributing to these behaviors? _____

My recommendations to help are:

□ Peer Support Program	□ Employee/Caregiver Assistance Program	□ Implementing Micropractices Into Routines
□ Wellness Program Referral	□ Adjusted Work Schedules or Duties	□ Mindfulness Programs or Apps
□ Other	□ Other	□ Other

Plan: _____

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