

Team energy and capacity assessment template

Overview

This template helps managers assess how their team is coping in terms of energy and workload. It's designed to highlight early signs of burnout risk, uneven workload distribution, or morale dips, so you can intervene early and effectively.

How to use it: Complete this assessment monthly or quarterly. You can complete it solo as a manager, or collaboratively with team input for deeper insights.

1. Team overview

Team name:	
Number of team members:	
Manager/supervisor:	
Assessment date:	

2. Energy check-in (individual level)

(Complete this section for each team member)

How would you describe your current energy level at work? (High / Moderate / Low)	
What activities energize you in your role?	
What activities drain your	

energy?	
Are there any recent changes affecting your energy at work?	

3. Capacity and workload

Current major priorities:	
Are deadlines consistently being met? (Yes / No / Sometimes)	
Are any team members consistently working overtime? (Y/N, who?)	
Are responsibilities evenly distributed across the team? (Y/N)	

4. Signals of strain

Increased absenteeism (Y/N)	
Lower morale or disengagement (Y/N)	
More frequent conflicts or tension (Y/N)	
Drop in quality or pace of work (Y/N)	

5. Manager's observations and concerns

What stands out from this assessment?	
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What strengths can be built on?

Where is support most urgently needed?