

STAFFING, CROSS-TRAINING & RETENTION PACK

Tools for real staffing gaps, cross-training needs, hiring priorities, new-hire coverage, and retention follow-up.

INCLUDED WORKING TOOLS

- Staffing Gap Worksheet
- Position Shortage Tracker
- Cross-Training Needs Review
- Hiring Priority Planner
- New Hire Coverage Plan
- Retention Follow-Up Review
- Fair Scheduling & Employee Data Guardrails

Use only the tools that solve a real operating need. Assign an owner, preserve required records, follow approved company policy, and use the current Gravity release. These materials support restaurant operations; they do not replace legal, payroll, accounting, HR, safety, or regulatory guidance.

STAFFING GAP WORKSHEET

Restaurant Name: _____

Date: _____

Manager Completing Worksheet: _____

Review Period: _____

1. Current Staffing Status

Overall staffing level:

- ☐ Fully staffed
- ☐ Mostly staffed
- ☐ Short in one area
- ☐ Short in multiple areas
- ☐ Critically short
- ☐ Not sure

Explain:

2. Department Staffing Review

FOH Staffing

FOH staffing level:

- ☐ Strong
- ☐ Adequate
- ☐ Weak
- ☐ Critically short
- ☐ Not sure

FOH positions short:

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Floor lead
- ☐ Other: _____

FOH staffing notes:

BOH Staffing

BOH staffing level:

- ☐ Strong
- ☐ Adequate
- ☐ Weak
- ☐ Critically short
- ☐ Not sure

BOH positions short:

- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep
- ☐ Dish

☐ Kitchen lead

☐ Other: _____

BOH staffing notes:

Bar Staffing

Bar staffing level:

☐ Strong

☐ Adequate

☐ Weak

☐ Critically short

☐ Not sure

Bar positions short:

☐ Bartender

☐ Service bartender

☐ Barback

☐ Cocktail server

☐ Bar lead

☐ Other: _____

Bar staffing notes:

Manager Staffing

Manager staffing level:

☐ Strong

☐ Adequate

☐ Weak

☐ Critically short

☐ Not sure

Manager coverage short:

☐ Opening manager

☐ Lunch manager

☐ Dinner manager

☐ Closing manager

☐ Kitchen manager or lead

☐ Floor manager or lead

☐ Bar manager or lead

☐ Other: _____

Manager staffing notes:

3. Shift Staffing Gap Review

Which shifts are hardest to staff?

☐ Monday opening

☐ Monday lunch

☐ Monday dinner

☐ Tuesday opening

☐ Tuesday lunch

☐ Tuesday dinner

☐ Wednesday opening

☐ Wednesday lunch

☐ Wednesday dinner

☐ Thursday opening

- ☐ Thursday lunch
- ☐ Thursday dinner
- ☐ Friday opening
- ☐ Friday lunch
- ☐ Friday dinner
- ☐ Saturday opening
- ☐ Saturday lunch
- ☐ Saturday dinner
- ☐ Sunday opening
- ☐ Sunday lunch
- ☐ Sunday dinner
- ☐ Closing shifts
- ☐ Weekend shifts
- ☐ Holiday shifts
- ☐ Other: _____

Most difficult shift to cover:

Why?

4. Staffing Gap Cause Review

What is causing the staffing gap?

Check all that apply:

- ☐ Not enough applicants
- ☐ Not enough trained employees
- ☐ Not enough reliable employees
- ☐ Not enough cross-training
- ☐ High turnover
- ☐ Employees unavailable during needed shifts
- ☐ Too many time-off requests
- ☐ Too many call-outs
- ☐ Weak hiring pipeline
- ☐ Poor training follow-up
- ☐ Strong employees overloaded
- ☐ Low employee morale
- ☐ Schedule does not match employee availability
- ☐ Position is difficult to hire for
- ☐ Manager coverage is weak
- ☐ Other: _____

Main cause:

5. Staffing Gap Impact

What is this gap affecting?

- ☐ Labor percent
- ☐ Overtime
- ☐ Schedule quality
- ☐ Guest service
- ☐ Ticket times
- ☐ Food quality
- ☐ Bar speed
- ☐ Dish flow
- ☐ Prep readiness
- ☐ Closing work

- ☐ Cleanliness
- ☐ Employee morale
- ☐ Manager control
- ☐ Training
- ☐ Sales
- ☐ Other: _____

Describe the impact:

6. Staffing Gap Correction Plan

What needs to happen?

- ☐ Hire for position
- ☐ Cross-train current employee
- ☐ Retrain current employee
- ☐ Adjust schedule
- ☐ Adjust availability expectations
- ☐ Build backup coverage
- ☐ Reduce overtime risk
- ☐ Improve retention
- ☐ Coach unreliable employee
- ☐ Create training plan
- ☐ Promote or develop lead
- ☐ Other: _____

Specific correction:

Person responsible:

Due date:

Follow-up date:

Staffing Gap Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

POSITION SHORTAGE TRACKER

Restaurant Name: _____

Manager Completing Tracker: _____

Date: _____

Review Period: _____

Position Shortage Entry 1

Position Reviewed: _____

Department: _____

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

☐ Low

☐ Medium

☐ High

☐ Critical

What happens when this position is short?

Correction needed:

☐ Hire

☐ Cross-train

☐ Retrain

☐ Adjust schedule

☐ Develop backup

☐ Coach reliability

☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Entry 2

Position Reviewed: _____

Department: _____

☐ **FOH**☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

What happens when this position is short?

Correction needed:

- ☐ Hire
- ☐ Cross-train
- ☐ Retrain
- ☐ Adjust schedule
- ☐ Develop backup
- ☐ Coach reliability
- ☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Entry 3

Position Reviewed: _____

Department:

☐ **FOH**☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Number of fully trained employees: _____

Number of reliable employees: _____

Number of employees in training: _____

Number of backups available: _____

Is this position short?

Yes / No / Some Shifts / Not Sure

Shifts most affected:

Risk level:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical

What happens when this position is short?

Correction needed:

- ☐ Hire
- ☐ Cross-train
- ☐ Retrain
- ☐ Adjust schedule
- ☐ Develop backup
- ☐ Coach reliability
- ☐ Other: _____

Action plan:

Person responsible:

Follow-up date:

Position Shortage Summary

Most critical position shortage:

Why?

Position shortage causing the most labor cost:

Why?

Position shortage causing the most service risk:

Why?

Position shortage that should be fixed first:

Reason:

Position Shortage Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

CROSS-TRAINING NEEDS REVIEW

Restaurant Name: _____

Manager Completing Review: _____

Date: _____

Review Period: _____

1. Cross-Training Need Identification

Which positions need more cross-training coverage?

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Bartender
- ☐ Barback
- ☐ Grill
- ☐ Fry
- ☐ Sauté
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep
- ☐ Dish
- ☐ Kitchen lead
- ☐ Floor lead
- ☐ Closing lead
- ☐ Other: _____

Highest priority cross-training need:

Why?

2. Current Backup Coverage Review

Position reviewed: _____

Current primary employees:

Current backup employees:

Are backups strong enough for busy shifts?

Yes / No / Some / Not Sure

Are backups strong enough for slow shifts?

Yes / No / Some / Not Sure

Are backups certified or just familiar with the position?

- ☐ Certified
- ☐ Familiar
- ☐ In training
- ☐ Not sure

Notes:

3. Cross-Training Candidate Review

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

Employee Name: _____

Current Position: _____

Position to Cross-Train Into: _____

Reason this employee is a good candidate:

Concerns:

Training needed:

Trainer assigned:

Target start date: _____

Target completion date: _____

4. Cross-Training Rules

Before using an employee as backup coverage, confirm:

- ☐
- Employee has been trained on the position

- ☐ Employee understands the standards
- ☐ Employee has practiced during a controlled shift
- ☐ Employee has been observed by manager or trainer
- ☐ Employee can perform safely and correctly
- ☐ Employee can protect guest experience
- ☐ Employee can protect quality standards
- ☐ Employee knows when to ask for help
- ☐ Manager has approved backup status
- ☐ Training status has been documented

5. Cross-Training Action Plan

Position to cross-train first:

Employee assigned:

Trainer assigned:

Training start date:

Review date:

How will success be measured?

What schedule gap should this training help solve?

Cross-Training Needs Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

HIRING PRIORITY PLANNER

Restaurant Name: _____

Manager Completing Planner: _____

Date: _____

Review Period: _____

1. Current Hiring Needs

Positions currently needing applicants:

- ☐ Host
- ☐ Server
- ☐ Busser
- ☐ Runner
- ☐ Expo
- ☐ To-go
- ☐ Bartender
- ☐ Barback
- ☐ Grill cook
- ☐ Fry cook
- ☐ Sauté cook
- ☐ Pantry / salad
- ☐ Pizza / specialty station
- ☐ Prep cook
- ☐ Dishwasher
- ☐ Kitchen lead
- ☐ Floor lead
- ☐ Manager
- ☐ Other: _____

Most urgent position:

Why?

2. Hiring Need Entry 1

Position Needed: _____

Department:

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Shifts needed:

Full-time, part-time, or either?

- ☐ Full-time
- ☐ Part-time
- ☐ Either

Urgency level:

- ☐ Low
- ☐ Medium
- ☐ High

☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

3. Hiring Need Entry 2Position Needed:

Department:

☐ **FOH**☐ **BOH**☐ Bar☐ Prep☐ Dish☐ Management☐ Other:

Shifts needed:

Full-time, part-time, or either?

☐ Full-time☐ Part-time☐ Either

Urgency level:

☐ Low☐ Medium☐ High☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

4. Hiring Need Entry 3Position Needed:

Department:

☐ **FOH**

☐ **BOH**

☐ Bar

☐ Prep

☐ Dish

☐ Management

☐ Other: _____

Shifts needed:

Full-time, part-time, or either?

☐ Full-time

☐ Part-time

☐ Either

Urgency level:

☐ Low

☐ Medium

☐ High

☐ Critical

Why is this hire needed?

What problem will this hire solve?

What happens if this position is not filled?

Training time expected:

Manager responsible for hiring follow-up:

5. Hiring Priority Ranking

Priority 1:

Reason:

Priority 2:

Reason:

Priority 3:

Reason:

6. Hiring Follow-Up Plan

Who will post or update the job opening?

Date job opening should be posted or reviewed:

Who will screen applicants?

Who will conduct interviews?

Who will approve hiring decisions?

Target hire date:

Notes:

Hiring Priority Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Owner or General Manager Approval: _____

Date: _____

Signature: _____

NEW HIRE COVERAGE PLAN

Restaurant Name: _____

New Hire Name: _____

Position Hired For: _____

Start Date: _____

Manager Completing Plan: _____

1. Hiring Purpose

Why was this employee hired?

- ☐ Replace employee who left
- ☐ Fill position shortage
- ☐ Add weekend coverage
- ☐ Add closing coverage
- ☐ Add prep coverage
- ☐ Add dish coverage
- ☐ Add bar coverage
- ☐ Reduce overtime
- ☐ Build backup coverage
- ☐ Seasonal staffing
- ☐ Other: _____

Specific staffing gap this hire should help solve:

2. Training Coverage Plan

Trainer Assigned: _____

Backup Trainer: _____

Training Start Date: _____

Expected Training Completion Date: _____

Training shifts planned:

Shifts to avoid during early training:

Reason:

3. New Hire Schedule Plan

Week 1 Schedule Plan:

Goal for Week 1:

Week 2 Schedule Plan:

Goal for Week 2:

Week 3 Schedule Plan:

Goal for Week 3:

4. Support Needed

New hire will need support with:

- ☐ Menu knowledge
- ☐ POS or order entry
- ☐ Service steps
- ☐ Guest communication
- ☐ Station setup
- ☐ Prep standards
- ☐ Food safety basics
- ☐ Bar procedures
- ☐ Dish procedures
- ☐ Side work
- ☐ Closing duties
- ☐ Speed
- ☐ Quality
- ☐ Team communication
- ☐ Other: _____

Support plan:

5. Schedule Risk Review

Will this new hire affect labor percent during training?

Yes / No / Not Sure

Explain:

Which shifts are safe for training?

Which shifts need stronger support because of this new hire?

When can this new hire begin helping fill the staffing gap?

What must be true before they work independently?

6. New Hire Progress Review

Date of first review:

Is new hire progressing as expected?

Yes / No / Partly / Not Sure

What is going well?

What needs improvement?

Does the training plan need adjustment?

Yes / No / Not Sure

If yes, what should change?

New Hire Coverage Sign-Off

Plan Completed By: _____

Position: _____

Date: _____

Signature: _____

Trainer Review: _____

Date: _____

Signature: _____

RETENTION RISK REVIEW

Restaurant Name: _____

Manager Completing Review: _____

Date: _____

Review Period: _____

1. Overall Retention Review

Current turnover concern:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Explain:

Which department has the highest retention risk?

☐ **FOH**

☐ **BOH**

- ☐ Bar
- ☐ Prep
- ☐ Dish
- ☐ Management
- ☐ Not sure

Why?

2. Employee Retention Follow-Up Entry

Employee Name: _____

Position: _____

Follow-up priority:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Observed work-related signals:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

3. Employee Retention Follow-Up Entry

Employee Name: _____

Position: _____

Follow-up priority:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Observed work-related signals:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

4. Employee Retention Follow-Up Entry

Employee Name: _____

Position: _____

Follow-up priority:

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Critical
- ☐ Not sure

Observed work-related signals:

- ☐ Reduced availability
- ☐ Increased call-outs
- ☐ Lower urgency
- ☐ Frustration
- ☐ Burnout
- ☐ Schedule complaints
- ☐ Conflict with team
- ☐ Conflict with manager
- ☐ Feels overlooked
- ☐ Wants more hours
- ☐ Wants fewer hours
- ☐ Wants different position
- ☐ Strong employee overloaded
- ☐ Other: _____

Notes:

What follow-up is needed?

Manager assigned:

Follow-up date:

5. Retention Cause Review

What may be causing retention risk?

Check all that apply:

- ☐ Schedule problems
- ☐ Too few hours
- ☐ Too many hours
- ☐ Too many difficult shifts
- ☐ Too many closing shifts
- ☐ Lack of training
- ☐ Lack of growth
- ☐ Lack of recognition
- ☐ Poor communication
- ☐ Weak management follow-up
- ☐ Employee conflict
- ☐ Burnout
- ☐ Pay concerns to discuss with ownership or approved leadership
- ☐ Personal availability changes
- ☐ Other: _____

Main retention concern:

6. Retention Action Plan

What action should managers take?

- ☐ Have check-in conversation
- ☐ Review schedule balance
- ☐ Review availability
- ☐ Offer training opportunity
- ☐ Offer cross-training opportunity
- ☐ Recognize strong performance
- ☐ Reduce overload
- ☐ Adjust position if appropriate
- ☐ Coach manager communication

- ☐ Review team conflict
- ☐ Discuss concern with owner or GM
- ☐ Other: _____

Specific action: _____

Person responsible: _____

Follow-up date: _____

7. Labor Control Connection

How could losing this employee affect labor control?

- ☐ Create schedule gap
- ☐ Increase overtime
- ☐ Increase training labor
- ☐ Weaken guest service
- ☐ Weaken kitchen coverage
- ☐ Weaken bar coverage
- ☐ Weaken prep coverage
- ☐ Weaken dish coverage
- ☐ Weaken closing coverage
- ☐ Reduce cross-training flexibility
- ☐ Increase manager stress
- ☐ Other: _____

Notes: _____

Retention Risk Sign-Off

Reviewed By: _____

Position: _____

Date Reviewed: _____

Signature: _____

Reviewing Manager or Owner: _____

Date: _____

Signature: _____

FAIR SCHEDULING & EMPLOYEE DATA GUARDRAILS

Use these rules whenever a schedule, hours decision, cut, availability record, call-out note, productivity review, or retention follow-up names an employee. These are operational controls and do not replace company policy or legal guidance.

BASE SCHEDULING DECISIONS ON JOB-RELATED FACTS

- ☐ Business need and expected volume.
- ☐ Approved employee availability and approved time off.
- ☐ Verified role / station capability, training status, and support needs.
- ☐ Documented job-related performance during the relevant review period.
- ☐ Overtime risk, required coverage, and company scheduling policy.

DO NOT TURN SHORTHAND INTO A PERMANENT LABEL

Use descriptions such as 'not yet verified for this station,' 'needs support on this shift,' or 'documented attendance / coverage pattern' instead of permanent labels such as weak, unreliable, difficult, or low-value. One bad shift, gossip, personality conflict, or manager preference is not a scheduling standard.

HOURS AND OPPORTUNITY FAIRNESS CHECK

- ☐ Apply comparable standards to comparable situations.
- ☐ Do not change hours as retaliation or because of favoritism, personal relationships, or protected characteristics.
- ☐ Give coaching, retraining, or verification opportunity when the gap is a trainable capability issue.
- ☐ Record the business reason and job-related evidence for a material hours / position change when documentation is appropriate.

MINIMUM-NECESSARY EMPLOYEE INFORMATION

- ☐ Availability / time off: record dates, status, and operational impact - not unnecessary medical, family, religious, disability, or other private detail.
- ☐ Call-outs: record the coverage impact and only the minimum operational note needed. Do not record medical diagnoses here.
- ☐ Retention follow-up: record observed work-related signals and confirm concerns through a direct conversation; do not guess at private causes.
- ☐ Route protected leave, accommodation, payroll, medical, or other sensitive matters through the company process approved for those records.

MANAGER CHECK

Before finalizing the decision, ask: Could I explain this decision using the same job-related standard if a different employee were involved? If not, stop and review the facts with the authorized manager / owner.