

Attachment 2
Organizational Assessment Worksheets

Organizational Assessment: Assessing the Quality of Clinical Care

Date: _____

Implementation Team Members:

_____	_____
_____	_____
_____	_____

This worksheet is divided into six sections, each referencing a different data source related to the quality of clinical care. Questions about each data source should be answered by the Implementation Team. There is a space for notes after each question and additional notes may be attached as needed.

The six data sources are as follows:

- MDS QI**
- Wellspring Data**
- Annual Survey Data**
- Letters of Praise/Complaints**
- Resident Council Minutes/Recommendations**
- Family Council Minutes/Recommendations**

Data Source: MDS QI	
Questions	Notes
Where is this data located?	
Who has access to the data?	
Who is responsible for collecting and maintaining this data?	
How is MDS data distributed (who/when/how often)?	
Do facility staff know how to access data?	
Have the data been used? Systematically? By whom?	
Is there general awareness of findings and what they suggest?	
Are data regularly interpreted for direct care staff?	
Have data been used in your organization's quality improvement activities?	
Are there consistencies/ inconsistencies across databases?	
Are data, and what they suggest, reflected in resident care planning?	
Have these data been used to guide staff development programming?	
Can you find examples of care delivery practices and systems developed in response to these data?	
How is this database most effectively used?	
How can this database be made more useful?	

Data Source: Annual Survey Data	
Questions	Notes
Where is this data located?	
Who has access to the data?	
Who is responsible for collecting and maintaining this data?	
How is Annual Survey data distributed (who/when/how often)?	
Do facility staff know how to access data?	
Have the data been used? Systematically? By whom?	
Is there general awareness of findings and what they suggest?	
Are data regularly interpreted for direct care staff?	
Have data been used in organization's quality improvement activities?	
Are there consistencies/inconsistencies with other databases?	
Are data, and what they suggest, reflected in resident care planning?	
Have these data been used to guide staff development programming?	
Can you find examples of care delivery practices and systems developed in response to these data?	
How is this database most effectively used?	
How can this database be made more useful?	

Data Source: Letters of Praise/Complaint	
Questions	Notes
Do you have these?	
If not, are these important to collect and disseminate?	
If so, where are they located?	
Who is responsible collecting this information?	
What do these letters indicate?	
What systems have been developed in response to these (i.e., What kicks in when a complaint is filed? Who is involved in this? Are complaints an issue of staff skill and capacity of staff or something else? How do you know this?)?	

Data Source: Resident Council Minutes/Recommendations	
Questions	Notes
Where is this data located?	
Who has access to the data?	
Who is responsible for collecting and maintaining this data?	
How are Resident Council minutes/recommendations distributed (who/when/how often)?	
Do facility staff know how to access this data?	
Have the data been used? Systematically? By whom?	
Is there general awareness of what this data suggests?	
Are these data regularly interpreted for direct care staff?	
Are these data used in the organization's quality improvement activities?	
Are there consistencies/inconsistencies with other databases?	
Are these data, and what they suggest, reflected in resident care planning?	
Have these data been used to guide staff development programming?	
Can you find examples of care delivery practices and systems developed in response to these data?	
How are these minutes/recommendations most effectively used?	
How can these data be made more useful?	

Worksheet: Quality of Clinical Care

"Assessing Resident Quality of Life"
Worksheet

Organizational Assessment: Resident Quality of Life

Date: _____

Implementation Team Members:

_____	_____
_____	_____
_____	_____

This worksheet is divided into three sections, each referencing a different data source related to resident quality of life. Questions about each data source should be answered by the Implementation Team. There is a space for notes after each question and additional notes may be attached as needed.

The three data sources are as follows:

**Resident Satisfaction Surveys
Family Satisfaction Surveys
Letters of Praise/Complaint**

Data Source: Resident Satisfaction Surveys	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, where are data located?	
Who is responsible for data?	
What do the data indicate?	
What systems have been developed in response to these data?	

Data Source: Family Satisfaction Surveys	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, where are data located?	
Who is responsible for data?	
What do the data indicate?	
What systems have been developed in response to these data?	

Data Source: Letters of Praise/Complaint	
Questions	Notes
Do you have these?	
If not, are these important to collect and disseminate?	
If so, where are they located?	
Who is responsible collecting this information?	
What do these letters indicate?	
What systems have been developed in response to these (i.e., What kicks in when a complaint is filed? Who is involved in this? Are complaints an issue of staff skill and capacity of staff or something else? How do you know this?)?	

“Assessing the Quality of Workplace Environment”
Worksheet

Organizational Assessment: Quality of the Workplace Environment

Date: _____

Implementation Team Members:

_____	_____
_____	_____
_____	_____

This worksheet is divided into seven sections, each referencing a different data source related to the workplace environment. Questions about each data source should be answered by the Implementation Team. There is a space for notes after each question and additional notes may be attached as needed.

The seven data sources are as follows:

- Staff Turnover/Retention Data
- Exit Interviews
- Performance Reviews of Supervisors
- Performance Reviews of Peers
- Staff Advancement Programs
- Staff Satisfaction Survey Data
- Staff Focus Groups

Worksheet: Quality of the Workplace Environment

Data Source: Staff Turnover/Retention Data	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, where are data located?	
Who is responsible for data?	
When do staff leave?	
How long post-orientation do staff leave?	
Do you know what occurs prior to staff leaving?	
Where do staff go after leaving?	
Are there unit or shift specific data to focus on?	

Data Source: Exit Interviews	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, what does the data indicate?	
What has been done as a consequence of what was learned from these interviews?	
Can you find three examples in your facility of utilizing information from staff exit interviews to improve the work experience?	
Do you know why employees leave your facility?	

Worksheet: Quality of the Workplace Environment

Data Source: Performance Reviews of Supervisors	
Questions	Notes
How/are performance reviews done?	
Do performance reviews reflect values of your organizational system? (i.e., are those in supervisory positions expected to have and use mentoring/coaching skills?)	
What are workers rewarded for?	
What are workers NOT rewarded for?	
How has staff performance review data been used to enhance the work environment?	

Worksheet: Quality of the Workplace Environment

Data Source: Performance Reviews of Peers	
Questions	Notes
How/are peer performance reviews done?	
Do performance reviews reflect values of your organizational system? (i.e., are those in supervisory positions expected to have and use mentoring/coaching skills?)	
What are workers rewarded for?	
What are workers NOT rewarded for?	
How has review data been used to enhance the work environment?	

Worksheet: Quality of the Workplace Environment

Data Source: Staff Advancement Programs	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, where are data located?	
Who is responsible for data?	
What does the data indicate?	
What systems have been developed in response to the data?	

Worksheet: Quality of the Workplace Environment

Data Source: Staff Satisfaction Survey Data	
Questions	Notes
Do you have these data?	
If not, are these data that would be important to collect?	
If so, where are data located?	
Who is responsible for data?	
What does the data indicate?	
What systems have been developed in response to the data?	

Data Source: Staff Focus Groups	
Questions	Notes
Have you ever conducted a focus group with staff?	
Do you have the data from the focus group discussion?	
If not, is staff focus group data something that would be important to collect?	
If so, what does the data indicate?	
What has been done as a consequence of what was learned in the focus group?	

If conducting a focus group with staff, suggested questions might be:

- **What do you like best about your job?**
- **What two things would you change about your job, if you could?**
- **When you learn something new, who do you generally learn it from?**
- **If you learn something new, do you have an opportunity to use that knowledge?**
- **What are the rewards here? Where do these come from?**
- **If you know something about a resident here, do you see it reflected in the plan of care for that resident?**