

Staffing Plan Effectiveness Assessment Worksheet

Purpose: This assessment is used to evaluate the effectiveness of the staffing plan. It should be completed at least twice per year and whenever significant changes occur in resident census, acuity, services provided, or staffing patterns. The assessment helps determine whether staffing levels are sufficient to meet resident needs and reasonably foreseeable unscheduled needs. Because this document is designed to encourage a thorough analysis of your facility's staffing plan, it includes factors that do not appear in the *Staffing Plan Guide and Worksheet*.

Facility Name:		Resident Census:	
Assessment Date:		Reference Period:	
Completed By:		Staffing Plan Revision Needed?	☐ Yes ☐ No

Estimating Staffing Time for Resident Care

Instructions: Use the tables below to estimate the amount of staff time needed to provide resident care and services during a typical day, week, or month. Choose one time period and use it consistently throughout the worksheet.

For each service:

- Identify the staff position(s) that provide the service.
- Record how many times the service is provided during the selected time period.
- Estimate the average number of minutes needed to complete the service one time.
- Calculate the total staff time required for that service.

Residents may be counted in more than one service category, because many residents receive multiple services. Include all services provided to residents so the estimate reflects the total staff time needed to meet resident needs.

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Calculating Staffing Time for Resident Care

Formula:

$$\text{Total Staff Time (Hours)} = \text{Number of Services} \times \text{Average Time per Service} \div 60$$

Example:

Two residents receive medication administration once daily and three residents receive medication administration twice daily.
The service is performed eight times per day. Each medication administration takes 10 minutes.

$$8 \times 10 \div 60 = 1.3 \text{ staff hours per day}$$

Clinical Services

Clinical Services	Responsible Position(s)	Number of Services	Average Time per Service (Minutes)	Total Staff Time (Hours)
Medication Administration				
Blood Glucose Checks				
Insulin Administration				
Treatments (wound care, oxygen, catheter care, CPAP, etc.)				
Vital Signs Monitoring				
Resident Assessment and Monitoring				
Prescriber and Pharmacy Communication				
Other:				
Other:				
Totals:				

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Personal Care Services

Personal Care Services	Responsible Position(s)	Number of Services	Average Time per Service (Minutes)	Total Staff Time (Hours)
Morning Care				
Evening Care				
Toileting Assistance				
Continence Care or Incontinence Assistance				
End-of-Life Care				
Dressing and Grooming Assistance				
Bathing and Showering Assistance				
Dining Assistance				
Transfer Assistance to Breakfast				
Transfer Assistance to Lunch				
Transfer Assistance to Supper				
Assistance with Therapy Exercises (PT, OT, or other exercises)				
Transfer or Lift Assistance				
Two-Person Transfer or Lift Assistance				
Other:				
Other:				
Totals:				

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Supervision and Safety

Supervision and Safety	Responsible Position(s)	Number of Services	Average Time per Service (Minutes)	Total Staff Time (Hours)
Escort and Ambulation Assistance				
Fall Prevention and Monitoring				
Behavioral Support and Monitoring				
Resident Check-Ins and Safety Monitoring				
Other:				
Other:				
Totals:				

Support Services

Support Services	Responsible Position(s)	Number of Services	Average Time per Service (Minutes)	Total Staff Time (Hours)
Housekeeping Assistance				
Laundry Assistance				
Activity Participation Support				
Transportation and Appointment Assistance				
Other:				
Other:				
Totals:				

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Administrative Activities

Administrative Activities	Responsible Position(s)	Number of Services	Average Time per Service (Minutes)	Total Staff Time (Hours)
Family and Representative Communication				
Documentation and Charting				
Staff Coordination and Communication				
Other:				
Other:				
Totals:				

Staffing Workload Summary

Instructions: Enter the total hours from each workload category above. Use the same time period (day, week, or month) that was used throughout the worksheet. Add the category totals to calculate the total staff time needed to meet resident needs.

Workload Category	Total Hours
Clinical Services	
Personal Care Services	
Supervision and Safety	
Support Services	
Administrative Activities	
Total Workload Hours:	

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Indicators to Consider When Evaluating Staffing

Instructions: Review the indicators below and compare them to the previous staffing plan review. For each indicator, mark whether it has increased, stayed the same, or decreased. Consider whether any changes suggest a need to review staffing levels, staffing patterns, staff training, resident services, or resident support needs. Skip any indicators that are not tracked or do not apply to your organization.

Note: No single indicator automatically requires a staffing change. Look for patterns or trends that may suggest resident needs, staffing levels, or staff assignments should be reviewed.

For example, increases in falls, medication errors, resident acuity, staff turnover, overtime, agency use, or hospital transfers may indicate a need to evaluate whether staffing levels and staff assignments continue to meet resident needs.

Indicator	Increased Since Last Review	No Significant Change	Decreased Since Last Review
Resident Census			
Resident Acuity			
Use of Agency Staff			
Overtime Usage			
Staff Turnover			
Falls			
Medication Errors			
Resident Complaints			
Staff Injuries			
Hospital Transfers			
Response Times to Resident Requests for Assistance			

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Significant Changes Since Previous Review

Instructions: Describe any significant changes in resident acuity, census, service needs, staffing patterns, or other indicators since the previous staffing plan review.

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Anticipated Staffing Challenges

Instructions: Check any factors that may increase staffing needs or require additional staff support, supervision, or flexibility.

(X)	Check all that apply
	Frequent falls
	Wandering/elopement risk
	High hospitalization or emergency department utilization
	End of life care needs
	Behavioral concerns or escalations
	Frequent resident requests for assistance (e.g., call light)
	Infection control or isolation precautions
	Frequent family communication needs
	Recent admissions, discharges, or care transitions
	Other:

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Additional Staffing Considerations

Instructions: Describe any other factors that may affect staffing needs:

Staffing Determination

Instructions: Review the workload summary, staffing challenges, and other information in this assessment. Determine whether available staffing is sufficient to meet resident needs during each shift.

Calculating Productive Staff Hours

Productive Staff Hours Available

Total scheduled staff hours × 0.85

Productive staff hours are the hours staff are available to perform resident care and other job duties after accounting for breaks, meetings, training, and other non-service activities. Adjust the factor if your organization uses a different estimate.

Shift	Workload Hours Required	Productive Staff Hours Available*	Difference (+/-)	Staffing Sufficient? (Y/N)
TOTAL				
Shift 1				
Shift 2				
Shift 3				
Shift 4				
Shift 5				
Other:				
Other:				

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Explanation of Staffing Determination

Instructions: Describe how the staffing plan supports resident needs, including anticipated changes in resident acuity, census, supervision needs, and other foreseeable staffing demands.

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Staffing Plan Review Outcome

Instructions: Based on this assessment, select all statements that apply:

(X)	Check all that apply:
	Current staffing levels are sufficient to meet resident needs.
	Current staffing levels are sufficient, but concerns were identified that require follow-up monitoring.
	Changes to staffing levels, staffing patterns, or staff assignments are needed.
	Additional evaluation is needed before making staffing changes.

Staffing Plan Action Items

Instructions: Complete this section if staffing changes or additional follow-up actions are needed.

Identified Need	Recommended Action	Responsible Person	Target Date

STAFFING PLAN EFFECTIVENESS ASSESSMENT WORKSHEET

Assessment Review

The individuals listed below reviewed this staffing plan effectiveness assessment and any resulting action items.

Role	Name	Signature	Date
Clinical Nurse Supervisor			
Licensed Assisted Living Director			

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