Organization Name: _____   **Organization ID:** _____
Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   **State:**_____

Organizational Workforce Assessment Workbook
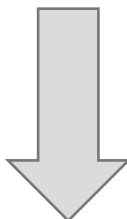
Demographic Data

It is important to be aware of the composition of your staff.

Please fill in all blanks. Enter a zero "0" for none.

Gray boxes are a **calculated value**.

Number of Staff	# Staff
1. How many of EACH staff category did your organization employ at the end of this reporting period:	---------------
Direct Support Professionals (DSPs)	
Frontline Supervisors (FLSs)	
Managers	
Administrative Staff (administrative, executive director, human resources, payroll, etc.)	
Other Employees who are not DSPs, FLSs, managers or administrative staff *Note: count professionally licensed staff (e.g., RN, LPN, OT, speech therapists, etc.) here.*	
Total **[calculated value]**	

Gender Identity	a) # DSPs	b) # FLSs
2. At the end of this reporting period, how many DSPs and FLSs were in each of the following gender identity groups?		
Women (including transgender women)		
Men (including transgender men)		
Non-Binary		
Other		
Unknown		
Total **[calculated value]**		

Organization Name: _____   **Organization ID:** _____
Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   **State:**_____

Race	a) # DSPs	b) # FLSs
3. At the end of this reporting period, how many DSPs and FLSs were in each of the following racial groups?		
Asian		
American Indian or Alaska Native		
Black or African American		
Native Hawaiian or Pacific Islander		
White		
Some Other Race		
Two or More Races		
Unknown		
Total **[calculated value]**		

Hispanic, Latino or Spanish Origin	a) # DSPs	b) # FLSs
4. At the end of this reporting period, how many DSPs and FLSs were of Hispanic, Latino or Spanish origin?		
Hispanic, Latino or Spanish origin		
Not Hispanic, Latino or Spanish origin		
Unknown		
Total **[calculated value]**		

Age Group	a) # DSPs	b) # FLSs
5. At the end of this reporting period, how many DSPs and FLSs were in each of the following age groups?		
15-20 years		
21-30 years		
31-40 years		
41-50 years		
51-60 years		
61-70 years		
71+ years		
Unknown		
Total **[calculated value]**		

ORGANIZATIONAL WORKFORCE ASSESSMENT WORKBOOK – DEMOGRAPHIC DATA

Organization Name: _____   Organization ID: _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____

End Date for reporting period. (e.g., YYYY-DD-MM): _____   State:_____

Marital Status	a) # DSPs	b) # FLSs
6. At the end of this reporting period, how many DSPs and FLSs were in each of the following marital status groups?		
Single		
Married		
Divorced		
Widowed		
Unknown		
Total **[calculated value]**		

Disability Status	a) # DSPs	b) # FLSs
7. At the end of this reporting period, how many DSPs and FLSs had a disability?		
Had a disability		
Did not have a disability		
Unknown		
Total **[calculated value]**		

Veteran Status	a) # DSPs	b) # FLSs
8. At the end of this reporting period, how many DSPs and FLSs were veterans?		
Veterans		
Not veterans		
Unknown		
Total **[calculated value]**		

Organization Name: _____ **Organization ID:** _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____

End Date for reporting period. (e.g., YYYY-DD-MM): _____ **State:** _____

Site/Setting (if applicable): _____ **Service Type (if applicable):** _____

Organizational Workforce Assessment Workbook

Direct Support Professional Overtime and Wages

It is important to be aware of the wages paid to Direct Support Professionals as they can impact retention. It is also important to know how much overtime they work. Wage augmentations including hourly wage increase for training completion, hourly wage increase for longevity, hourly wage increase for reasons other than longevity, or bonuses for referrals, hiring, years of service, performance recognition, or other reasons are also gathered.

Please fill in all blanks. Enter a zero "0" for none.

Gray boxes are a **calculated value.**

Direct Support Professional Wages

Hourly Wages for Direct Support Professionals	Answer		
	a) All (Full-time and Part-time) DSPs	b) Full-time DSPs	c) Part-time DSPs
1. What is the average starting hourly wage for DSPs (example: 10.50)? *(To compute the average wage of all starting DSPs, add up the wages of all starting DSPs and divide by the total number of starting DSPs)*			
2. What is the average hourly wage for DSPs (example: 10.50)? *(To compute the average hourly wage of all DSPs, add up the hourly wages of all DSPs and divide by the total number of DSPs)*			

Direct Support Professional Overtime

Direct Support Professionals Overtime	Answer	
3. How many total hours of overtime were paid out to DSPs during this reporting period?		# OT hours paid to DSPs
4. Cost of Overtime Hours for DSPs during this reporting period **[calculated value]**		Total Cost of OT paid to DSPs

Wage Augmentations

Incentives for Direct Support Professionals	Answer	
5. During this reporting period, did your organization give an <u>hourly</u> wage increase for DSPs once training was completed? *(Select Yes or No) (If No, skip to question 6)*	☐ Yes ☐ No	
5a. How many DSPs received the increase once training was completed?		# DSPs receiving hourly wage increase once training was completed
5b. What was the total amount of money spent on hourly wage increases once training was completed for DSPs during this reporting period?		$ spent on hourly wage increases once training was completed for DSPs
6. During this reporting period, did your organization give <u>hourly</u> wage increases for longevity for DSPs? *(Select Yes or No) (If No, skip to question 7)*	☐ Yes ☐ No	
6a. How many DSPs received the increase for longevity?		# DSPs receiving hourly wage increase for longevity
6b. What was the amount of money spent on hourly wage increases for longevity for DSPs during this reporting period?		$ spent on hourly wage increases for longevity for DSPs
7. During this reporting period, did your organization give <u>hourly</u> wage increases for reasons other than longevity for DSPs? *(Select Yes or No) (If No, skip to question 8)*	☐ Yes ☐ No	
7a. How many DSPs received the increase for reasons other than longevity?		# DSPs receiving hourly wage increase for reasons other than longevity
7b. What was the total amount of money spent on hourly wage increases for reasons other than longevity for DSPs during this reporting period?		$ spent on hourly wage increases for reasons other than longevity for DSPs
8. During this reporting period, did your organization give a monetary employee referral bonus to DSPs? *(Select Yes or No) (If No, skip to question 9)*	☐ Yes ☐ No	
8a. How many DSPs received the employee referral bonus?		# DSPs receiving monetary employee referral bonus
8b. What was the total amount of money spent on employee referral bonuses for DSPs during this reporting period?		$ spent on employee referral bonuses for DSPs

Organization Name: _____   **Organization ID:** _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   **State:** _____
Site/Setting (if applicable): _____   **Service Type (if applicable):** _____

Incentives for Direct Support Professionals	Answer	
9. During this reporting period, did your organization give newly hired DSPs a monetary hiring bonus? *(Select Yes or No) (If No, skip to question 10)*	☐ Yes ☐ No	
9a. How many DSPs received the hiring bonus?		# DSPs receiving monetary hiring bonus
9b. What was the total amount of money spent on hiring bonuses for DSPs during this reporting period?		$ spent on hiring bonuses for DSPs
10. During this reporting period, did your organization give DSPs a monetary bonus or award for performance recognition? *(Select Yes or No) (If No, skip to question 11)*	☐ Yes ☐ No	
10a. How many DSPs received the performance recognition bonus or award?		# DSPs receiving monetary bonus or award for performance recognition
10b. What was the total amount of money spent on performance recognition bonuses or awards for DSPs during this reporting period?		$ spent on performance recognition bonuses or awards for DSPs
11. During this reporting period, did your organization give DSPs a monetary bonus or award for years of service? *(Select Yes or No) (If No, skip to question 12)*	☐ Yes ☐ No	
11a. How many DSPs received the years of service bonus or award?		# DSPs receiving monetary bonus or award for years of service
11b. What was the total amount of money spent on years of service bonuses or awards for DSPs during this reporting period?		$ spent on years of service bonuses or awards for DSPs
12. During this reporting period, did your organization give DSPs a monetary bonus or award for reasons other than employee referrals, hiring, performance recognition, or years of service? *(Select Yes or No)*	☐ Yes ☐ No	
12a. How many DSPs received the other reasons bonus or award?		# DSPs receiving monetary bonus or award for other reasons
12b. What was the total amount of money spent on other bonuses or awards for DSPs during this reporting period?		$ spent on bonuses awards for other reasons for DSPs

Organization Name: _____   **Organization ID:** _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____
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Site/Setting (if applicable): _____   **Service Type (if applicable):** _____

Organizational Workforce Assessment Workbook

Direct Support Professional Tenure and Vacancy (all DSPs)

It is important to understand Direct Support Professional retention trends in your organization. This includes Employee Status, Crude Separation Rate (Turnover), Early Turnover, Vacancy Rate, the type of Separation (Involuntary/Voluntary), and Tenure.

Please fill in all blanks. Enter a zero "0" for none.

Gray boxes are a **calculated value.**
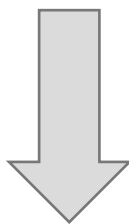
Employee Status

This represents the FTE breakdown of DSPs for all DSP positions at the end of the reporting period.

Number of Direct Support Professionals		Answer
1. How many Full-time DSPs worked at your organization at the end of this reporting period?		# of FT DSPs
2. How many Part-time DSPs worked at your organization at the end of this reporting period?		# of PT DSPs
3. How many temporary DSPs, independent contractors, and on-call DSPs worked at your organization at the end of this reporting period?		# of temp/on-call/indep. contractor DSPs
Total Number of DSPs **[calculated value]**		# DSPs

Definition of Full-time Status
This represents the minimum of hours a DSP has to work to be considered full-time employee.

Minimum Number of Hours Direct Support Professionals Work to be Full-time		Answer
4. What is the minimum number of hours a DSP needs to work per week to be considered full-time?		Minimum # of hrs to be FT DSP

Organization Name: _____   Organization ID: _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   State: _____
Site/Setting (if applicable): _____   Service Type (if applicable): _____

Crude Separation Rate (Turnover)

This represents the percentage of DSPs who left (turned over) out of all DSP positions during the reporting period. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

Crude Separation Rate		Answer
5. How many DSPs left your organization during this reporting period?		# DSPs who left
6. How many Full- and Part-time DSPs worked at your organization at the end of this reporting period? *(This number is the sum of Q1 and Q2)* **[calculated value]**		# DSPs total
7. How many vacant DSP positions did your organization have at the end of this reporting period?		# vacant DSP positions
DSP Crude Separation Rate (Turnover) **[calculated value]**		%

Early Turnover Rate

This represents the percentage of DSPs who left (turned over) with less than 6 months of tenure during the reporting period. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

Early Turnover Rate		Answer
8. How many DSPs left your organization during this reporting period? *(This number is Q5)* **[calculated value]**		# DSPs who left
9. Of the DSPs who left their position during this reporting period, how many of them left before working 6 months?		# DSPs who left within 6M of hire
DSP Early Turnover Rate – Within 6 Months of Hire **[calculated value]**		%

Percent of DSP Voluntary vs. Involuntary Termination

This represents the percentage of DSPs who left voluntarily and involuntarily during the reporting period. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

Percent of Voluntary Direct Support Professional Termination		Answer
10. How many DSPs left your organization during this reporting period? *(This number is Q5)* **[calculated value]**		# DSPs who left
11. Of the DSPs who left their position during this reporting period, how many of them left voluntarily?		# DSPs who left voluntarily
% Voluntary DSP Termination **[calculated value]**		%

Organization Name: _____   Organization ID: _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   State: _____
Site/Setting (if applicable): _____   Service Type (if applicable): _____

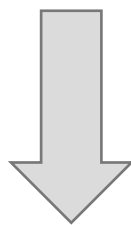| Percent of Involuntary Direct Support Professional Termination		Answer
12. How many DSPs left your organization during this reporting period? *(This number is Q5)* **[calculated value]**		# DSPs who left
13. Of the DSPs who left their position during this reporting period, how many of them left involuntarily?		# DSPs who left involuntarily
% Involuntary DSP Termination **[calculated value]**		%

Vacancy Rate

This represents the percentage of vacant DSPs positions at the end of the reporting period. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

Vacancy Rate		Answer
14. How many Full- and Part-time DSPs worked at your organization at the end of this reporting period? *(This number is the sum of Q1 and Q2)* **[calculated value]**		# DSPs total
15. How many vacant DSP positions did your organization have at the end of this reporting period? *(This number is Q7)* **[calculated value]**		# vacant DSP positions
DSP Vacancy Rate **[calculated value]**		%

Average Tenure

This represents the average tenure (in months) across all DSP positions. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

Average Tenure		Answer
16. How many Full- and Part-time DSPs worked at your organization at the end of this reporting period? *(This number is the sum of Q1 and Q2)* **[calculated value]**		# DSPs total
17. What is the total number of months all DSPS were employed by the end of this reporting period? *(Add together the number of months each DSP has been employed)*		# months all DSPs employed
DSP Average Tenure (in months) **[calculated value]**		months

Organization Name: _____   Organization ID: _____

Start Date for reporting period. (e.g., YYYY-DD-MM): _____
End Date for reporting period. (e.g., YYYY-DD-MM): _____   State: _____
Site/Setting (if applicable): _____   Service Type (if applicable): _____

Percent 13+ Months Tenure

This represents the percentage of DSPs who have been employed 13 or more months at the end of the reporting period. (Please do NOT include temporary DSPs, independent contractors, or on-call DSPs in your calculations)

13+ Months Tenure		Answer
18. How many Full- and Part-time DSPs worked for your organization at the end of this reporting period*? (This number is the sum of Q1 and Q2)* **[calculated value]**		# DSPs total
19. At the end of this reporting period, how many DSPs have been employed at your organization for 13 or more months?		# DSPs employed 13+ months
DSP Percent 13+ Months Tenure **[calculated value]**		%