

Life-safety compliance tracking: Smartsheet and Power BI audit

Prepared for Harbor Ridge Senior Living, a six-facility skilled nursing operator with about 420 staff.

Prepared for	Review period	Report date	Findings
Director of Facilities & EHS Manager	Jun 21 – Sep 18, 2026	September 29, 2026	2 critical, 4 important, 1 minor

Sample report. Harbor Ridge Senior Living, its facilities, people and all figures are fictional. This shows the format, depth and tone of a real audit.

Your team is doing the inspections. The system around them is losing track of what was *required*, so leadership is seeing a compliance number that is 15 points better than reality.

Biggest issue	The leadership dashboard reports 96% on-time inspection compliance . Measured against what was actually required in the period, it is 81% . Missed inspections never become rows, so the dashboard can’t count them. Night-shift fire drills were also missed at two facilities while the dashboard showed green.
Biggest opportunity	Moving the six drifting facility sheets onto one standard template would give you a number you can defend in a survey, and save the team an estimated 6 hours a week of manual reconciliation.
Recommended next step	A five-week, fixed-price Life-Safety Reporting Reset (\$9,800) that fixes findings 1 to 5 before your next Life Safety Code survey window. Details on page 6.

96% vs 81% On-time inspection rate: dashboard vs. required calendar	3 of 18 Required Q2 fire drills (each shift, each facility) not held	81 Open deficiencies with no named owner (38% of 212)	~6 hrs Staff time per week spent reconciling facility sheets
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What we looked at

Smartsheet: “Life Safety – All Facilities” workspace

- 6 facility inspection sheets (extinguishers, sprinklers, alarms, generator, exits, fire doors, drills)
- 1 deficiency log, 3 reports, 1 leadership dashboard
- 14 automations and 2 intake forms
- Sharing, permissions and activity logs

Power BI: “Life Safety Compliance” report

- 4-page report and its semantic model
- Measures, relationships and calculated columns
- 90 days of refresh history and gateway setup
- Load times and usage metrics

How we reviewed it

A 45-minute walkthrough with your Director of Facilities and EHS Manager, followed by read-only review of the workspace, report and logs. No data left your environment.

Not in scope

Physical condition of equipment, vendor alarm and sprinkler systems, other EHS programs, and any determination of regulatory compliance. **We reviewed records and reporting, not the buildings.**

Findings at a glance

#	Finding	Severity	Effort to fix
1	Compliance rate is overstated by 15 points. Missed inspections are invisible to the dashboard.	Critical	S
2	Drills aren’t tracked by shift. Three required Q2 drills were missed while the dashboard showed all facilities compliant.	Critical	S
3	Deficiencies stall without owners. 38% have no owner, and owner alerts silently fail at three facilities.	Important	S
4	Six facility sheets have drifted apart. Seven different “status” values and three stale copies still feed reports.	Important	M
5	The dashboard fails quietly. 11 refresh failures in 90 days, with alerts going to a former employee.	Important	S
6	Former staff still have access. 9 departed users; 47 people can edit the deficiency log.	Important	S
7	The facility page is slow. 9.8 seconds to load, so administrators export to Excel instead.	Minor	M

Effort: S = under a week, M = 2–4 weeks, L = more than a month.

Findings

1 The compliance rate is overstated by 15 points

Critical

Effort S

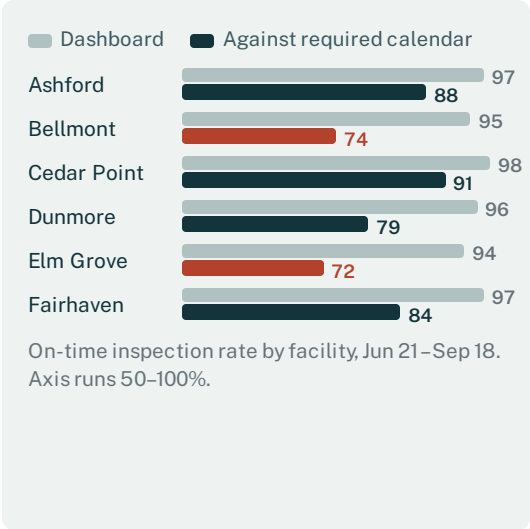
What we found

The dashboard divides on-time rows by *all rows in the sheet*. An inspection that was never done never gets a row, so it drops out of the math entirely. Another 28 rows are marked “Complete” with dates after their due date.

Against the required inspection calendar, 1,040 of 1,284 inspections were done on time (81%). The dashboard reports 1,068 of 1,111 rows (96%).

Why it matters

Leadership is making staffing and budget calls on a number a surveyor would not accept. Belmont and Elm Grove are both below 75% and would likely draw findings if surveyed today. Nobody can see that from the dashboard.



2 Fire drills aren’t tracked by shift

Critical

Effort S

What we found

The drill log records a date and a facility, but no shift. The dashboard marks a facility compliant if it held *any* drill in the quarter. The Life Safety Code for healthcare occupancies expects drills on *every* shift each quarter.

Reconstructing shifts from drill times, 3 of the 18 required Q2 drills were not held. Two were night shifts.

Why it matters

Missed drills are among the most commonly cited fire-safety deficiencies in skilled nursing surveys, and night shift is where staffing is thinnest. The dashboard showed all six facilities green for the whole quarter.

Q2 2026	Day	Evening	Night
Ashford	✓	✓	✓
Belmont	✓	✓	Missed
Cedar Point	✓	✓	✓
Dunmore	✓	✓	✓
Elm Grove	✓	Missed	Missed
Fairhaven	✓	✓	✓

Dashboard showed: 6 of 6 compliant

Shift assigned from drill start time: day 7a–3p, evening 3p–11p, night 11p–7a.

3 Deficiencies stall because nobody owns them

Important

Effort S

What we found. 81 of 212 open deficiencies have no named owner. Every facility sheet has a “notify owner” automation, but at Bellmont, Dunmore and Elm Grove the Owner column is plain text, not a contact. Those automations have sent zero alerts in 90 days, and nobody noticed.

Why it matters. A broken fire door or a blocked exit sits for weeks. Open items are 47 days old at the median, and a surveyor will ask for the correction date on every one.



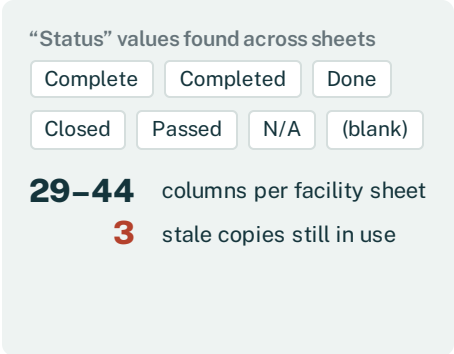
4 Six facility sheets have drifted into six different systems

Important

Effort M

What we found. The facility sheets started as copies of one original in 2023. They now range from 29 to 44 columns, use different names for the same field, and record status seven different ways. Three stale copies (“FINAL”, “FINAL v2”, “OLD DO NOT USE”) still feed two reports. Power BI patches this with a 40-line nested formula that has to be edited every time a facility invents a new value.

Why it matters. Every monthly roll-up needs manual reconciliation, an estimated 6 hours a week across the team. Each new status value quietly changes the compliance number.



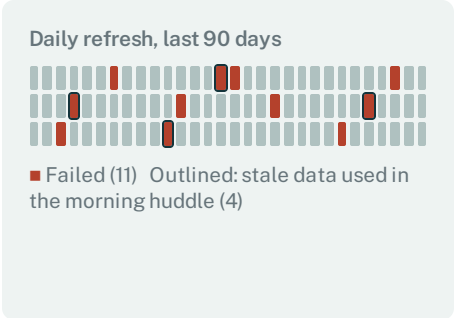
5 The dashboard fails quietly

Important

Effort S

What we found. The dataset refreshes daily at 6 a.m. It failed 11 times in the last 90 days. Failure emails go to the mailbox of the analyst who built the report and left in June. The gateway runs on a single desktop in the facilities office, and most failures line up with that machine restarting for updates.

Why it matters. On 4 of those days, the morning huddle reviewed stale numbers without knowing it. A dashboard that is sometimes wrong and never says so loses trust fast.



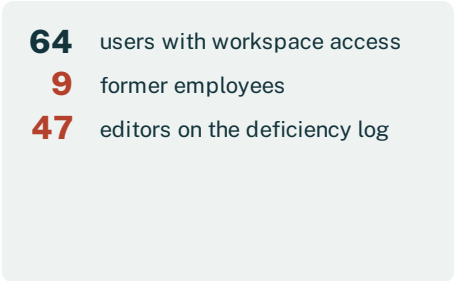
6 Former staff still have access

Important

Effort S

What we found. 64 people have access to the workspace. 9 of them no longer work at Harbor Ridge. 47 have Editor rights on the deficiency log, so anyone can change a closed date, and there is no periodic access review.

Why it matters. If a record is questioned, you can’t show that only accountable people could change it. That is an audit-trail gap in a regulated record.



7

The facility page is too slow to use on rounds

Minor

Effort M

What we found. The facility detail page takes 9.8 seconds to load. The model is one wide flat table with 18 calculated columns. Usage metrics show administrators open it about twice a month and export to Excel instead.

Why it matters. The report exists, but decisions are being made from spreadsheets outside it. A simpler model would bring load time under 3 seconds.

Recommendations

Ranked by return on effort. The first three address findings 1 to 4 and make the compliance number defensible.

	Recommendation	Effort	Value
1	Measure against what was required, not what was recorded Build a required-inspection calendar for each facility, including drills per shift, and calculate compliance against it. Missed items show up as missed.	1 week	A number you can defend in a survey; Bellmont and Elm Grove flagged now, not by a surveyor
2	One standard template for all six facilities Consolidate into a single structure with a controlled status list and one intake form. Retire the stale copies and the patch formula.	3–4 weeks	~6 hours a week back (about 300 hours a year); keeps recommendation 1 accurate
3	Required owners and aging escalation for deficiencies Make Owner a required contact field, fix the broken alerts, and escalate items to the administrator at 30, 60 and 90 days.	1 week	Median open age down from 47 days; every item has a name and a date

Quick wins you can do this week

- Remove the 9 former employees and review who needs Editor rights.
- Point refresh-failure alerts to a shared mailbox.
- Change Owner to a Contact column at Bellmont, Dunmore and Elm Grove.
- Schedule the missed evening and night drills at Bellmont and Elm Grove.

Strategic, over the next quarter

- Rebuild the Power BI model as a star schema (finding 7).
- Move the gateway to a managed server with a second node.
- Quarterly access review, documented for survey readiness.
- Extend the same template to other EHS programs.

Proposed next step

You can act on this report yourself, and the quick wins on page 5 need no outside help. If you want findings 1 to 5 fixed and validated before your next survey window, this is the fixed-scope option.

Life-Safety Reporting Reset

An accurate, survey-ready compliance number and one tracking system across all six facilities.

Fixed price	Timeline	Proposed start
\$9,800	5 weeks	Oct 26, 2026

Week 1	Required-inspection calendar and corrected compliance measure, including drills by shift. Validated against 90 days of your records, facility by facility.
Weeks 2–4	One standard Smartsheet template for all six facilities, with controlled status values, one intake form, working owner alerts and 30/60/90-day escalation. History migrated; stale copies retired.
Weeks 4–5	Power BI model rebuilt for speed (target under 3 seconds), refresh alerts to a shared mailbox, and access cleaned up with a documented review process.
Handover	Data dictionary, named owner for every measure, a 60-minute training session, and 30 days of support after go-live.
Not included	Gateway hardware, vendor system integrations, and other EHS programs. These can be quoted separately.

Reply to hold the October 26 start. I take on a limited number of projects at a time. If the timing doesn't work, say so and we'll find another slot, or keep the report and run with it.

Reply by Oct 16

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