

## GUIDANCE FOR WORKING WELL

UPDATED

### Background

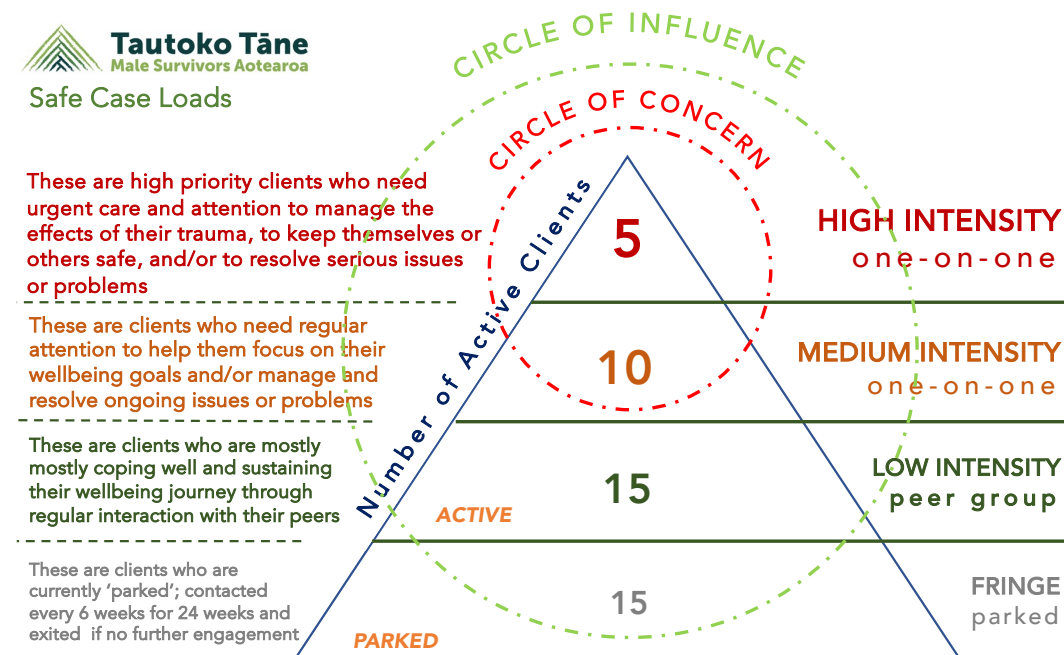
A group of managers from Tautoko Tāne Aotearoa (TTA) Member Organisations (TMO), who were attending a Reflective Practice training course, took some time out to consider how peer workers could manage their workloads in a manner that enhanced their wellbeing. This Practice Note was developed to record the outcomes of their conversations.

More recently the practice note has been updated to factor in the potential impacts of service centre locational geographies, the developmental status of the service centre, including whether the service is currently hosting peer support groups and the operational scale measured in terms of active client loading.

### Safe Case Loads

Gaining an understanding of the case load that a normal peer worker can sustain, while operating in a safe manner, is important in modelling the resources (and therefore funding) that we need to provide an effective service. It seems reasonable to assume that the sustainability of an individual case load is primarily related to the intensity of the peer relationship. High intensity relationships driven by levels of trauma, urgency, concerns about safety etc., take more time and usually deserve an urgent/primary focus. In contrast, low intensity peer relationships where the peer/client is coping well and where support contact is less frequent are more easily managed.

A potential safe case load model for a mature peer worker, operating in a centrally located service centre that offers peer support group services could be defined as follows:



For a small mature peer support service operating with peer support groups and staffed by two fulltime peer workers, this model suggest that the maximum safe client load is 100 clients – 70 active clients (comprising 10 high intensity, 20 regular (medium intensity) clients, 30 clients in peer support groups) and 30 fringe or ‘parked’ clients that are held in a “check in’ status prior to being exited from active status.

However, these client load configurations will vary depending on the maturity of the service (how long it has operated in the area), whether it is operating peer support groups and the demographics and geographical spread of the client base. It is suggested that a consideration of these contributing case load factors could be assessed as follows:

Service Maturity	Operational Period	Peer Groups	Locational Geography Span	Peer Worker Case Loading Impact					
				High	Med	Low	Park	Total	Ref
EMERGENT	1-3 years	None	Centralised	5	10	0	10	25	E1
			Wide Span	4	6	0	10	20	E2
		Some	Centralised	5	10	10	10	35	E3
			Wide Span	4	6	10	10	30	E4
DEVELOPING	3-6 years	None	Centralised	5	10	0	15	30	D1
			Wide Span	4	6	0	10	25	D2
		More	Centralised	5	10	10	15	40	D3
			Wide Span	4	6	15	10	35	D4
MATURE	> 6 years	Some	Centralised	5	10	15	15	45	M1
			Wide Span	5	10	10	15	40	M2
		Most	Centralised	5	10	20	15	50	M3
			Wide Span	5	10	15	15	45	M4

The aim of the model is to establish an indicative case load boundary, especially for one-on-one support services, and not a target – service quality must always take precedence over number of cases managed.

## Operational Scale

As a service centre EFT staffing level increases, there will be opportunities to achieve some economies of scale in the way the service operates. By way of example the ability to fund administrative roles can release more peer support worker contact time and the use of groups can become more prevalent as client numbers expand and the number of group facilitators increase. However, the effect of operational scale can be dampened where a larger service centre is also required to support a widely spread geographical community. But as the number of peer workers expands the opportunities for transport and travel efficiencies may increase (for example) as regional centres become feasible and vehicle ownership cost are reduced through pooling systems.

Obviously, it is difficult to create a general rule for the impacts of operational scale, as individual service centre operational circumstances may vary widely.

The proposition advanced in this case note is that for active client loads of <200 there is no operational scale effect. And for active case loads >200 the operational scale effect is estimated to be as follows, where Operational Scale Impact is the estimated % reduction in required EFT:

<i>Case Load Level</i>	>200	>300	>400	>500
<i>Operational Scale Impact</i>	4%	6%	8%	10%

## Active/Parked Clients

Active clients are loosely defined as clients that remain in contact with the support service. Good practice suggests that if we regard a client as part of our active case load, then we are obligated to maintain a level of contact with that client that enables us to be reasonably assured that they are coping well without needing more regular support. Once a client ceases to need regular one-on-one or group support, they are 'parked' in case management database.

TTA's guideline for managing 'parked' clients requires that they are contacted as a minimum every 6 weeks to ensure that they don't need any further support. If after 24 weeks, the 6-weekly contacts indicate that no further support is required, a parked client become inactive and can be exited from the active client list, but they are retained in the case management data base.

## Geographic Span

For service centres that operate across a wide geography, travel time (and related expenses) can have a significant impact on available client contact time. By way of example (Taranaki) it can take an hour to travel to a client session making the total time invested 3 hours for a 1-hour one-on-one contact. While scheduling meetings with co-located or near-located clients can reduce the overall travel time impacts, it is important that travel time is factored in when considering safe client loadings for peer workers operating across a wide geographical area.

Locational considerations can also be important when comparing the opportunity to use peer groups to reduce contact intensity in services that have a largely centralised client base versus services with a geographically dispersed client base.

## Wellbeing Work Focus

The next question addressed by the TMO managers was - how should a peer support worker operate to manage a safe case load while at the same time sustaining their wellbeing? The following diagram records the suggestions that emerged from the manager conversations and could be a useful guide for planning peer worker activities.

Clearly the mix of activities will vary but the intention is clear:

- **Take time out during the working day – wellbeing is key to service quality.**
- **Maximum client contact hours should not exceed 50% of available time.**

- Allow realistic time for management and administration.

Typical Working Week Focus					
	Week 1	Week 2	Week 3	Week 4	
<b>Wellbeing</b>					
Supervision				1	<i>Professional</i>
Reflective Practice	1		1		<i>one with MMO manager/ one internal</i>
Physical Exercise	2	2	2	2	
Personal Learning	2	2	2	2	<i>Could include cultural supervision</i>
Te Kairaranga		1			<i>Monthly contact</i>
<b>Five hours per week</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>One hour per day</b>
	13%	13%	13%	13%	
<b>Client Contact</b>					
High Intensity 1-1	13	13	13	13	<i>5 clients @ 2.5 hours each</i>
Medium Intensity 1-1	4	4	4	4	<i>10 Clients; 3 per week @ 1 hour each</i>
Low Intensity - Groups	3	3	3	3	<i>2 groups @ 1.5 hours</i>
Fringe [parked]	1	1	1	1	<i>2 contacts per week at 0.5 hours</i>
<b>Twenty hours per week</b>	<b>21</b>	<b>21</b>	<b>21</b>	<b>21</b>	<b>Four hours per day</b>
	53%	53%	53%	53%	
<b>Management</b>					
Client Administration	10	10	10	10	<i>50% of contact time/ 2 hours per day</i>
Group Administration	2	2	2	2	<i>one hour per group</i>
Marketing Relationships	2	2	2	2	<i>two hours per week</i>
<b>Fifteen hours per week</b>	<b>14</b>	<b>14</b>	<b>14</b>	<b>14</b>	<b>Three hours per day</b>
	35%	35%	35%	35%	
<b>Total Hours</b>	<b>40</b>	<b>40</b>	<b>40</b>	<b>40</b>	

*Note: Services with remote geographies may need extra group sessions with less medium intensity client loads*