1.0 WHAT IS THE WISEMAN WORKLOAD MEASURE

The Wiseman Workload Measure (WWM) is a tool that measures actual and total workload. Within the tool, total workload is defined as 'Direct Care, Indirect Care, Role/Agency Tasks and Travel'.

The tool is completed by individual practitioners and can be aggregated to represent team and service total activity and total capacity.

The Wiseman Workload Measure was originally devised in 1992 and has been used successfully by multi-disciplinary and multi-agency staff working in Community Mental Health Teams (CMHT) for adults and older people. The tool has been audited and updated several times and has proved to be valid and reliable in all settings.

2.0 WHAT ARE THE MEASURES

The WWM describes total workload in four sections. These are:-

- Direct Care
- Indirect Care
- Role/Agency Tasks
- Travel.

These elements were derived originally through study and audit of Community Psychiatric Nursing Activity. Since then they have been shown to accurately explain and measure the total workload of any community practitioner.

The Direct Care, Indirect Care and Role/Agency Tasks sections are referred to as the Professional Elements of the total workload.

2.1 DIRECT CARE

Direct Care describes the element of workload that involves face to face contact with the service user. Frequency and duration of face-to-face contacts provide an accurate measure of service user dependency.

The Direct Care section of the WWM identifies the frequency and duration of contacts for each service user on a caseload and incorporates a measure for group activities such as depot clinics, therapy groups etc. Thus, individual and cumulative levels of dependency are confirmed. Effective management of capacity and demand requires a balance between turnover (admission and discharge) and dependency.

2.2 INDIRECT CARE

Indirect Care describes all service user related tasks that do not involve face-to-face contact with the service user such as documentation, liaison, carer support and case reviews etc.
2.3 ROLE/AGENCY TASKS

The Role/Agency tasks section measures the amount of time required for other duties necessary for service delivery and development and continuous, professional maintenance and development. Some examples are staff meetings, management tasks, education, supervision of self and others and special projects.

2.4 TRAVEL

Travel can be associated with any of the other three sections. Defining the amount expended on each section does not add value to the information supplied therefore it is measured as the full amount required for the total workload. The calculation for travel used in the WWM was established from recorded travel time statistics over a period of 6 months. The calculation has been tested on five occasions and has been found to represent an accurate, average per hour mileage for urban and rural travel.

3.0 WORKLOAD AND SERVICE MANAGEMENT

Under usual circumstances the WWM is completed once per month. The information logged is derived from a complete, random, working week from the four weeks prior to the date of completion. A single record does not provide definitive facts and figures however, over time cumulative records supply an accurate description of actual workload and workload management. Service/team capacity and demand can be identified by aggregating the information from individual WWMs. If circumstances dictate the WWM can be used more frequently. It is open to the individual user to decide the most appropriate frequency for purpose.

3.1 RELATIONSHIP BETWEEN THE WORKLOAD ELEMENTS

The relationships between the three professional elements of the WWM are shown below. Individual recordings will illustrate peaks and troughs but failure to demonstrate these ratios over time indicates that the practitioner may be concentrating on one element of workload to the detriment of the other elements. It should be noted that these ratios only apply where the core purpose of a post is direct service delivery.

- Direct Care to Indirect Care ratio is 2:1
  i.e. every 60 minutes of direct care will require 30 minutes of indirect care

- Direct Care + Indirect Care to Role/Agency Tasks is 2:1
  i.e. every 90 minutes of Direct + Indirect Care will require 45 minutes of Role/Agency Tasks
3.2 ALTERATIONS TO THE RELATIONSHIP OF THE WORKLOAD ELEMENTS

Where the core purpose of the post is not direct service delivery then the ratios may be different to that quoted above and the user will need to establish the correct ratios through comparison of measures over time.

For example, the core purpose of some posts, particularly in Older People's Services is weighted towards care or case management. Such posts will show a higher level of Indirect Care and a lower level of Direct Care so the ratio is likely to be reversed.

The core purpose of posts should be clarified before the WWM is applied so that the applicable ratios are explicit for all users. Please contact the copyright holder if you require further guidance.

In addition to the above, if a direct care practitioner is undertaking a substantial course of education or training or is involved in a significant project then there may a temporary change to the ratio of Direct + Indirect Care to Role/Agency Tasks.

3.3 INFORMATION OUTCOMES

Traditionally caseload numbers have determined workload estimates despite the fact that caseload numbers are known to be an ineffectual measure of anything other than numbers.

The usefulness of the WWM is the versatility of the measures that allow the user to capture total workload even in circumstances where the workload content has altered. For example, when training or project work is added to the workload the overall commitment is immediately measured, quantified and evidenced within the Role/Agency Tasks section.

The combined outcomes for all sections of the WWM define actual, total workload and provide reliable evidence on which to base workload management, service management and decision-making.

4.0 SUPERVISION/REFLECTION

The WWM provides a legitimate basis for discussion and reflection within the supervision process and includes a Turnover and Time-On-Caseload Monitor to enhance its value as an aid to supervision/reflection. The caseload profile and workload information obtained using the WWM combined with the Turnover and Time-On-Caseload Monitor serve to increase practitioners’ awareness of their styles of and approaches to care delivery and management. The supervisor also gains more insight into practitioners’ practice.

Using the WWM practitioners are able to describe and justify individual styles of therapeutic contact. For instance, a high number of weekly contacts may illustrate intense contact with high turnover which is consistent with caseloads of around 20 service users over time. Equally, less frequent contact with average turnover is consistent with caseloads of 20-30 service users over time but can produce the same therapeutic outcomes and deal with the same number of service users over a given
WISEMAN WORKLOAD MEASURE
GUIDANCE NOTES

time period. High dependency service users are likely to require intense contact with low turnover which is consistent with caseload numbers of around 10-15 over time.

The WWM also enables practitioners and supervisors to identify quickly issues that may be disruptive to workload management. For example a high number of weekly contacts with low turnover and caseload numbers of 25-30 will immediately be demonstrated as demand exceeding capacity. The level of excessive demand will be quantified. The caseload can be capped and the need for such a high frequency of contact with little movement in the caseload can be explored. A continuing care caseload that demonstrates high weekly contact over long periods with little movement towards less frequent contact and minimal turnover may indicate that care plans require review.

5.0 COMPLETING THE WWM FORM
(Please read this section in conjunction with the worked example of the WWM supplied along with these guidance notes)

To complete the WWM services or practitioners must have in place a system/process for recording and retrieving data about who is on the caseload along with a calendar of contacts that provides reliable information about the frequency of input over time.

If completing the WWM monthly, the information logged should be derived from a complete random working, week from the four working weeks prior to the date of completion.

Capacity:
Insert the total capacity for the individual or the team whichever is applicable.

Calculating Capacity:
- Time is calculated in 15-minute segments. Each segment is one unit thus:-
  - 15 minutes = 1 Unit
- The maximum capacity available is calculated thus:-
  - Total number of hours per weekly contract x 4.
  - Example:
    each hour of time = 4 Units
    1 whole time equivalent nurse works 37.5 hours per week.
    37.5 x 4 = 150 Units
    maximum capacity = 150 Units

Direct Care:
Insert the number of service users as applicable at each section then multiply the number of clients by the number shown on the form. The numbers on the form represent the units of time absorbed by the frequency and duration of contact.

Calculations for clients seen for more than or less than one hour per week as well as calculations for group work are shown on the worked example.
Indirect Care:
List each activity and the number of units taken to complete each activity specified for that week. Only full units should be used. Remember each unit = 15 minutes.
Example: Care Plan 8 units+Carer Support 3 units+Client letters 10 units+Case Conference 4 units+Telephone Liaison 5 units+ Telephone support to client 4 units - Total = 34 units. Insert 34 in the box (34 units = 8.5 hours)

Role agency Tasks:
List each activity and the number of units taken to complete each activity specified for that week. Only full units should be used. Remember each unit = 15 minutes.
Example: Teaching students-preparation 10 units+meeting 6 units+Staff meeting 8 units+Clinical supervision self 5 units+clinical supervision of others 5 units+Allocation Meeting 9 units - Total = 43 units. Insert 43 in the cell (43 units = 10.75 hours)

Travel:
Insert the number of business miles travelled during the week being recorded. Travel time is calculated at 36 miles per hour therefore 9 miles = 1 Unit

Case Load:
Enter the number of service users on the caseload at the time when the above information applied.

To measure actual capacity used add together the units on the right side of the form down to the double line.

Persistent totals in excess of maximum unit capacity means that the workload is potentially excessive. There can be a variety of causes e.g. demand exceeds capacity, service user/caseload/time management issues, inequitable workload distribution within a team. This should be explored and monitored in order to establish evidence-based conclusions.

Caseload Activity:
Enter the numbers of service users for each category listed on the form.

N.B. ‘Waiting List’ refers to your personal waiting list and not the service waiting list i.e. referrals you have agreed to accept but not yet allocated a first appointment.
6.0 COPYRIGHT AND INTELLECTUAL PROPERTY AND TERMS OF USE
FOR THE WISEMAN WORKLOAD MEASURE

By using the Wiseman Workload Measure you agree to the following terms:

1. You may not modify, adapt, lend or otherwise transfer, in whole or in part, the Wiseman Workload Measure or the Wiseman Workload Measure Guidance Notes.

2. You will not distribute the Wiseman Workload Measure directly to staff other than for the purpose of measuring and managing workload.

3. You will not sell, distribute, or otherwise use the Wiseman Workload Measure for commercial purposes.

4. You will include Frances Wiseman’s copyright statement on all copies of the Wiseman Workload Measure as it appears on the suite of documents.

5. Anyone wishing to quote extracts from any of the suite of documents that make up the Wiseman Workload Measure in the production of their own work must identify the source of the material and acknowledge the copyright status.

******************************************************************************
Week Commencing:......07/06/2010

Direct Care:

- No. of clients allocated approximately one hour per week
  - 3 clients × 4 = 12 units

- No. of clients allocated approximately one hour per fortnight
  - 8 clients × 2 = 16 units

- No. of clients allocated approximately one hour every 3 weeks
  - 4 clients × 1 = 4 units

- No. of clients allocated approximately one hour every 4 weeks
  - 0 clients × 1 = 0 units

- No. of clients requiring contact more frequently than stated above
  - 2 clients

  - e.g. 1x30mins daily + 1x2hrs weekly = 150 + 120 mins weekly = 270 mins total weekly = 270/15 = 18 units weekly

- No. of clients requiring contact less frequently than stated above
  - 2 clients

  - e.g. 1x30 mins every 6 weeks + 1x60 mins every 8 weeks = 5 + 8 mins weekly = 13 mins total weekly = 1 unit weekly

- No. of clients: Group Activities
  - 14 clients

  - e.g. Anxiety Management Group: 90 mins - 6 clients + PND Group 60 mins - 8 clients = 90 + 60 mins = 150 mins / 15 = 10 units weekly

Indirect Care:

- Care Plan 8 units
- Client Letters 10 units
- Case Conference 5 units
- Telephone Liaison 5 units
- Telephone Support to client 6 units

  - Total = 34 units

Role/Agency Tasks:

- Teaching/Students – prep 10 units/meeting 6 units
- Staff Meeting – 8 units
- Clinical Supervision
- Self 5 units
- Other staff 5 units
- Rotas – 6 units
- Allocation Meeting 3 units

  - Total = 43 units

Travel:

- No. of miles travelled per week
  - 110 ÷ 9 = 12 units

Total:

- 150 units

Caseload No.

© Frances M Wiseman 2010
CASELOAD: ACTIVITY

Name: A N Other ..................  Date Completed: ......21/06/2010

Week Commencing: ......07/06/2010 ...........

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Discharges:</td>
<td>5</td>
</tr>
<tr>
<td>Number of Admissions:</td>
<td>3</td>
</tr>
<tr>
<td>Number on Practitioner’s Waiting List:</td>
<td>2</td>
</tr>
<tr>
<td>Number of clients who have been on the caseload for 0-6 months</td>
<td>6</td>
</tr>
<tr>
<td>Number of clients who have been on the caseload for 7-12 months</td>
<td>9</td>
</tr>
<tr>
<td>Number of clients who have been on the caseload for more than 12 months</td>
<td>4</td>
</tr>
</tbody>
</table>
COPYRIGHT, INTELLECTUAL PROPERTY AND TERMS OF USE FOR THE WISEMAN WORKLOAD MEASURE

By using the Wiseman Workload Measure you agree to the following terms:

1. You may not modify, adapt, lend or otherwise transfer, in whole or in part, the Wiseman Workload Measure or the Wiseman Workload Measure Guidance Notes.

2. You will not distribute the Wiseman Workload Measure directly to staff other than for the purpose of measuring and managing workload.

3. You will not sell, distribute, or otherwise use the Wiseman Workload Measure for commercial purposes.

4. You will include Frances Wiseman’s copyright statement on all copies of the Wiseman Workload Measure as it appears on the suite of documents.

5. Anyone wishing to quote extracts from any of the suite of documents that make up the Wiseman Workload Measure in the production of their own work must identify the source of the material and acknowledge the copyright status.
## WISEMAN WORKLOAD MEASURE

**Name:................................................... Date Completed:..........................................**

**Week Commencing:.............................................**

<table>
<thead>
<tr>
<th><strong>Direct Care:</strong></th>
<th>clients</th>
<th>units</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. clients allocated approximately one hour per week</td>
<td>x 4</td>
<td>=</td>
</tr>
<tr>
<td>No. of clients allocated approximately one hour per fortnight</td>
<td>x 2</td>
<td>=</td>
</tr>
<tr>
<td>No. of clients allocated approximately one hour every 3 weeks</td>
<td>x 1</td>
<td>=</td>
</tr>
<tr>
<td>No. of clients allocated approximately one hour every 4 weeks</td>
<td>x 1</td>
<td>=</td>
</tr>
<tr>
<td>No. of clients requiring contact more frequently than stated above</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>No. of clients requiring contact less frequently than stated above</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>No. of clients: Group Activities</td>
<td>=</td>
<td></td>
</tr>
</tbody>
</table>

**Indirect Care:**

<table>
<thead>
<tr>
<th>Role/Agency Tasks:</th>
</tr>
</thead>
</table>

| Travel: No. of miles travelled per week | ÷ 9 | = |

**Total**

<table>
<thead>
<tr>
<th>Caseload No.</th>
</tr>
</thead>
</table>
CASELOAD ACTIVITY

Name: ........................................................ Date Completed: ......................................

Week Commencing: ........................................

Number of Discharges:

Number of Admissions:

Number on Practitioner’s Waiting List:

Number of clients who have been on the caseload for 0-6 months

Number of clients who have been on the caseload for 7-12 months

Number of clients who have been on the caseload for more than 12 months
COPYRIGHT, INTELLECTUAL PROPERTY AND TERMS OF USE FOR THE WISEMAN WORKLOAD MEASURE

By using the Wiseman Workload Measure you agree to the following terms:

1. You may not modify, adapt, lend or otherwise transfer, in whole or in part, the Wiseman Workload Measure or the Wiseman Workload Measure Guidance Notes.

2. You will not distribute the Wiseman Workload Measure directly to staff other than for the purpose of measuring and managing workload.

3. You will not sell, distribute, or otherwise use the Wiseman Workload Measure for commercial purposes.

4. You will include Frances Wiseman’s copyright statement on all copies of the Wiseman Workload Measure as it appears on the suite of documents.

5. Anyone wishing to quote extracts from any of the suite of documents that make up the Wiseman Workload Measure in the production of their own work must identify the source of the material and acknowledge the copyright status.