Workload Assessment Model

You can email questions to Donna.Bell@gov.ab.ca anytime during the presentation.
Workload Management in Human Services

1991: Workload Study-101 Standards

1999: Workload Standards Development Project Report

2003: Foster Care Workload Study

2008: Resource Forecasting Model for CI

2010: Resource Forecasting Model for FC, Adoption, CC and FSCD

2011: Workload Benchmarks for CI, FC, Adoption, CC and FSCD

2013: OPT Resource Forecasting Model

2015: Revision of CI Resource Forecast and Benchmarks

Note:
1. Year indicates calendar year of project completion.
2. This list of milestones may not be comprehensive.
Evolution of Child Intervention Practice

1998: CFSAs created

2004: Child and Family Enhancement Act


2009: ISIS Implementation begins

2009: Outcome Based Service Delivery Implementation in Calgary & Edmonton

2010: OBSD is Implemented in Central, North Central, Northwest, South

2012: Work on Child Intervention Practice Framework begins

2013: Prevention & Early Intervention Framework begins

2013: Front End & Practice Strategies Piloted

2014: Signs of Safety implemented Practice Strategies implemented

Note:
1. Year indicates calendar year of project completion.
2. This list of milestones may not be comprehensive.
What is the Workload Assessment Model?

- The model represents a holistic approach to managing workload using a number of complimentary strategies for a variety of roles.

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Intensity Rating</td>
<td>CI Intake Worker</td>
</tr>
<tr>
<td>Work Breakdown Structure</td>
<td>CI Assessor</td>
</tr>
<tr>
<td>Activity Time Estimates</td>
<td>CI Case Manager</td>
</tr>
<tr>
<td>Resource Forecasting Model</td>
<td>CI Generalist</td>
</tr>
<tr>
<td>Role Based Workload Benchmarks</td>
<td>CI Permanency Worker</td>
</tr>
</tbody>
</table>

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Project Design

- Key features of methodology:
  - Case complexity considerations
  - Quantitative and qualitative analysis
  - Workload considerations (non-case work)

- Stakeholder Engagement and Collaboration:
  - Fifteen Work Group members representing all regions, CI roles, program policy, HR and Sub 006
  - Eight workshops
  - Discussions on foundational topics
  - Staff involvement through provincial survey of 120 staff participants
  - Regular Communication with key stakeholders
### Benchmarks 2011

<table>
<thead>
<tr>
<th>Case Work Practice Role</th>
<th>Workload Benchmark</th>
<th>Case Throughput</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reference Period: # of working days</td>
<td># of active cases during reference period (min-max)</td>
</tr>
<tr>
<td>1. Intake/Screening</td>
<td>5</td>
<td>11-19</td>
</tr>
<tr>
<td>2. Assessor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) Safety</td>
<td>10</td>
<td>4-8</td>
</tr>
<tr>
<td>b) Detailed</td>
<td>30</td>
<td>8-15</td>
</tr>
<tr>
<td>3. Case Management</td>
<td>90</td>
<td>15-23</td>
</tr>
<tr>
<td>5. Generalist</td>
<td>n/a</td>
<td>11-18</td>
</tr>
</tbody>
</table>

### Benchmarks 2015

<table>
<thead>
<tr>
<th>Case Work Practice Role</th>
<th>Workload Benchmark</th>
<th>Case Throughput</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reference Period: # of working days</td>
<td># of active cases during reference period (min-max)</td>
</tr>
<tr>
<td>1. Intake/Screening</td>
<td>5</td>
<td>8-13</td>
</tr>
<tr>
<td>2. Assessor*</td>
<td>40</td>
<td>7-12</td>
</tr>
<tr>
<td>3. Case Management</td>
<td>n/a</td>
<td>12-19</td>
</tr>
<tr>
<td>4. Permanency*</td>
<td>n/a</td>
<td>16-22</td>
</tr>
<tr>
<td>5. Generalist</td>
<td>n/a</td>
<td>9-15</td>
</tr>
</tbody>
</table>

Notes:
1. These benchmarks are based on activity time estimate data collected between Jan-Mar 2015.
2. An active case for Intake and Assessment relates to a family in the process; active case for Case Management relates to a child in the process.
3. The Reference Period is the turnaround days for the phase/work as in current policy.
   * Assessor and Permanency roles require further minor validation.
Change Approach

1. Collaboration - Consultation Committee comprising of representatives from key stakeholder groups.
2. Consultative: Workshops and discussions within the committee and with stakeholders at large.
3. Purposeful:
   - Conduct assessment of impact on stakeholders
   - Develop recommendations on implementation, address stakeholder concerns and interests.
   - Rollout of new benchmarks, training, workload allocation process, workload balancing approach, non-formal issue escalation process.
   - Communication and change management
   - Assess implications or impacts w.r.t. CCISD and other HS programs
4. Build consensus and get approvals.
5. Incremental approach to roll-out and implementation.
Critical Success Factors

1. Executive support for the change.
2. Collaborative approach that includes all affected stakeholders as partners.
3. Enterprise approach, resolve it like a collective problem and opportunity.
4. Transparency and clarity of intent and purpose.
5. Communications and messaging to emphasize:
   - What’s in it for me for each stakeholder group
   - Uses and exceptions for workload benchmarks
6. Training and education to workers and supervisors.
7. Focus on workload balancing as a continuous operational process, not an event triggered by appeals or grievance.
8. A practical rollout and implementation approach – e.g. pilot sites, allow a stabilization period etc.
WHEN YOU'RE LEAVING ON A FRIDAY AND THE MANAGER WANTS TO TALK TO YOU ABOUT A NEW CASE...
WHEN THE MANAGER ASKS IF YOU'RE COPING OK WITH YOUR CASELOAD

WHO SAYS SOCIAL WORK IS STRESSFUL?

I'M 36 AND I FEEL GREAT!
Thank You!