

AREA TEAM HOME HELP/HOME CARE SUPERVISORY AND CLERICAL STAFFS  
USE OF TIME

TWO  
A PROPOSED ONE WEEK DIARY STUDY

1. INTRODUCTION

The workload of team staff has increased since regionalisation both in terms of client caseloads and numbers of home helps employed. The present exercise is concerned with ensuring that the numbers of supervisory staff are also increased so as to safeguard the quality of the service and ensure the most appropriate use of the resource.

The time available to supervisory staff for use in assessment and review visits to clients is a key factor where efficiency and effectiveness of the service is concerned. Naturally there are other important considerations but this one of visiting time is crucial to the prompt assessment and frequent review of clients. Without such assessments and reviews the service can not be managed in such a way as to maintain the right quantity and quality of service to people in greatest need.

The desirable standard for review frequency is felt to be every six weeks. It appears from available statistics that the average in practice is of the order of every three to six months or even more in the different Divisions. Hence existing staff are finding, in general, that it is impossible to achieve the visiting levels required. Furthermore, the problems are different or more pronounced in some Divisions than in others.

It is vital to understand the range and extent of other demands on supervisory staff time. Until this is clarified there is no certainty that any additional staff will themselves have the hoped for impact upon review frequency - their time may also be absorbed by other duties. Furthermore, it is impossible to take steps to rectify the situation at a team, divisional or regional level, if the problems are not identified and (preferably) quantified. Subjective opinion and feeling can only take this major issue so far. Firmer data are required if systematic action is to be taken appropriately and with sensitivity. Such data may show, for example, that visiting time is eroded because supervisory staff are doing tasks that could be done more appropriately by other types of staff. Alternatively, they may show that there is little that can be done to release a larger proportion of time for visits. This type of information is necessary if appropriate staffing plans are to be laid down for the future and desirable changes made in present operations.

In the short term the data are important to the development of the argument relating to desirable staffing levels. It is hoped that a report will go to committee in an attempt to establish minimum supervisory staffing levels in relation to workloads as measured by home help and client caseloads, and be based on standards relating to assessment and visiting frequencies.

2. /

## 2. THE DIARY STUDY

A one week study of the time spent by organisers, supervisors and clerical assistants on their various activities is proposed. This will give some idea of the time spent in the office, on visits to clients and elsewhere. It will identify the major tasks, the variety of tasks performed and the demands made upon these staff.

A simple and quick method of self-recording will be devised and a separate account of telephone calls received and other unscheduled interruptions will be kept. In order to ensure that a suitable set of activities are identified on this record sheet, careful preparation involving appropriate staff is proposed. The initial work already done by some staff should be very useful in the development of a suitable record sheet.

Development and analysis of the record sheets will be undertaken by Averil Osborn, S.R.O., who will report to the Assistant Director (Field Services).

## 3. PROPOSED STEPS AND TIME SCALE (As yet this is subject to revision)

- 1) January Senior research officer visits a small sample of teams to observe office work and visits and to get the views of home care staff on the range of activities undertaken. This is to aid the devising of a suitable record sheet. Further discussions will also be held with John Smithson, Management Services, on account of his existing work in this field.
- 2) February A draft record sheet is to be circulated for comment. The type of analysis required will be defined. A small number of staff will be asked to do a trial run so that unforeseen problems can be ironed out.
- 3) March All being well, a one week run will be conducted. All organisers, supervisors and clerical home help/care staff will record the use of their time over this week.
- 4) April / May Report back by the senior research officer to the staff involved and to management followed by discussion of the results and consideration of further smaller studies where problem areas require this.
- 5) June Report to committee.

## 4. COMMUNICATION

The intention is that the Assistant Director (Field Services) will inform the Union of this study at an early date. The researcher hopes to keep in touch with area staff concerned throughout. Manpower limitations will mean that the latter may be by written notes in some cases as there is less available time than one would wish for this important feature of the exercise. The Assistant Director is committed to close involvement with this exercise, as are the divisional home care/help staff. Hence several avenues of communication are open.

5. /

5. THE REASON FOR STUDYING ONLY <sup>2</sup> ONE WEEKS

A ~~one~~ week study is proposed as sufficient information should be obtained over this period and the effort involved in participating in a longer exercise can be counter-productive. However it is recognised that there could be different patterns of work on different weeks in the month and during different months in the year. The advisability of spreading the study over a two week period has not been ruled out. Views on this will be sought at the initial planning stage. If it is argued that a single week gives a very biased picture for our purposes, then it may be necessary to take a two week run, look at several weeks through the year, or devise a totally different time sample.

*2 weeks as this is the work cycle*

AVERTIL OSBORN  
Senior Research Officer, Development Section

HQ/AO/MF  
December 1977.

LOTHIAN REGIONAL COUNCILHOME HELP/HOME CARE STAFF USE OF TIME

A two week diary study of the way in which area team based home help organisers, supervisors and clerical assistants spent their time.  
Conducted Monday 3rd April-Friday 14th April 1978.

The study covered the 64 home help (called home care in some divisions) organisers, supervisors and clerical staff based in the Area Teams at the time.

This was NOT a study of home helps use of time.

Each diary sheet covered one day i.e. 10 forms per person. A form was included where the staff member was away/sick etc. on the day but working on at least one day of the study.

Staff off sick, on holiday etc. over the whole period were excluded.

I believe the SPSS programme could not accommodate as one record a person-fortnight and handled the data in person-weeks.

MONDAY, 3RD APRIL - FRIDAY, 14TH APRIL

### INSTRUCTIONS

Over the study period of 10 working days, all Home Help and Home Care Staff are asked to keep daily diary sheets and daily logs of incoming 'phone calls. Each section is also asked to keep a daily log of visitors to the office.

Three forms are to be used:-

1. Daily Time Sheet (buff coloured) - on card
2. Daily Log of Visitors to the Office (green) - *not forwarded (manually processed)*
3. Daily Log of Incoming Telephone Calls (blue) - *transferred to the Daily time sheet.*

#### 1. Filling in the Daily Time Sheet

Each team Home Help / Care Organiser, Supervisor and Clerical Assistant is to complete one daily time sheet for each day of the study period.

As you see, there are three parts to the form. The major part provides a complete record of time spent during the day.

At the end of each day you are asked to check that the total recorded time reflects the total hours you have worked. If you have under-recorded then go over your form and see if you can allocate the 'lost' time. (It is very easy to under-record when doing a range of activities over the day, or where you have dealt with a number of visitors or 'phone calls).

Time spent on 'non work activities' such as lunch, coffee etc. is of no concern to us here, and should NOT be recorded.

The time spent is broken down by activity and divided into morning (up to 1 m) and afternoon. Work activities that cannot be assigned to a specific listed activity go into 'miscellaneous', but you are also asked to describe the activity in the separate section on the right of the form. This should be used only as a last resort; where possible use the other categories provided.

The second part of this form allows for a more detailed breakdown of visits to clients, and the third provides a separate record of travel time. Note that times recorded in these sections will also be included in the main section under the appropriate headings i.e. all time on visits to clients, including travel time, goes into the 'visits to home help clients' or 'visits to non home help clients' categories. Other travel time goes under the activity the purpose for which the journey was made.

#### 2. Filling in the Daily Log of Incoming Telephone Calls

When you deal with an incoming call, this should be counted on your telephone log sheet.

#### 3. Filling in the Daily Log of Office Visitors

Your section is asked to nominate one member who will keep a count of all visitors to the office.

#### Time Spent Dealing with Visitors or Incoming Calls

No times are recorded on the visitors or incoming calls log sheets. However, if you spent a significant amount of time dealing with visitors or incoming calls or the work generated by them, simply add this time onto the daily time sheet under the appropriate activity, e.g. work arranging a service to clients (arising from a telephone call from a sick home help) is counted under 'Work Allocation (Home Help) - changes'.



## THE ACTIVITIES

It is not possible to include all activities in which you might be involved, nor is it practical to sub-divide the major activities into their constituent parts.

The descriptions provided below are not exhaustive but serve to illustrate the type of work included under the general headings.

### VISITS TO HOME HELP CLIENTS

The total visiting and associated travel time should be recorded in the 'activities' chart.

A breakdown of time spent with each client is required in the 'Details of Visit' box at the bottom of the sheet. Here visits are further divided into First Visits (assessment for service), Review Visits (routine re-assessment of need) and Other Visits (visits to clients for a reason other than routine assessment/review, e.g. special request to revisit, follow up of complaints, etc.). The time spent with each client here excludes travel time, travel time being totalled and recorded in the bottom right section 'Travel Time'.

### LIAISON RE HOME HELP CLIENTS

Any contact with others on behalf of the general welfare of the client or potential client is included here. Other workers could include those within the department e.g. home helps, team or hospital social workers, other Organisers or Supervisors, people within other agencies, e.g. health visitors, G.P.s., Housing Department, D.H.S.S. etc., or other individuals such as friends, relatives or neighbours of the client. Discussions with referrers are included here. Case Conferences are included under this heading, as are Part IV panels, etc. where you are attending because you know the client. Work specifically related to allocation of home helps to clients is excluded from this heading.

### WORK ALLOCATION (HOME HELP)

This involves all activities necessary to allocate home helps to clients for the necessary hours. A distinction is made between 'repeat programmes' and 'changes'.

I) REPEAT PROGRAMMES - the work necessary to ensure that the same home helps go to the same clients for the same days and hours to do the same duties over the next two weeks as they have in the current fortnight.

II) CHANGES - any work arising from changes in the existing work programmes, e.g. arranging service for a new client, change of hours or days for a client, case allocation to a new home help, coverage where a help is sick or on holiday, redeployment of helps where a client is away from home or a case is ceased, notifying home helps or clients of changes, preparing lists of waiting clients in order to allocate or change their service, etc. (Remember to include time spent on 'phone calls in relation to the above')

### DETAILS OF VISIT

Described already under 'Visits to Home Help Clients' and 'Visits to Other Clients'.

A 'no contact' category is included for Home Help clients as these visits should be counted, although no time is spent with clients. Associated travel time is noted in the travel section and total time taken up by such visits is included under the 'Visits to Home Help clients' activity.

### HOME HELP PAY, CLIENT ACCOUNTS

#### I) ROUTINE

All work necessary to prepare client accounts and obtain payments come under this heading, including any work on the financial assessment of clients. The work on 'the boards' in Edinburgh Division is included here. Likewise work necessary to ensure the home helps are paid are included. This involves checking and processing information on hours worked e.g. collecting in and checking time sheets, preparing computer sheets, checking sick and holiday files, any handling of pay packets, keeping a record of holidays and sickness.

#### II) QUERIES

Any queries relating to home helps' pay or clients' accounts are included here. The enquirer could be a home help, a client, staff at Divisional or Regional Headquarters, or others.

### HOME HELP RECRUITMENT

Including advertising, talking to enquirers, processing applications, following up references, interviewing, preparing personnel records.

### HOME HELP SUPPORT/SUPERVISION

All time spent with home helps primarily for support and supervision purposes, whether in the office, their own or the client's home, at 'clinics' or elsewhere. The major focus must be on the home help's performance, abilities and problems, not the assessment or review of needs of the client. (It is assumed that some visits to clients will include a secondary support/supervision element but this should not be recorded under the present heading.)

### WORK RELATED TO OTHER SERVICES

for which your Section has responsibility

#### I) VISITS TO OTHER CLIENTS

Total visit and travel time to clients in relation to non Home Help Services for which the Home Help/Care Section has some responsibility e.g. Meals on Wheels, T.V. licences, Neighbourhood Aides.

In addition a record of time spent with each such client should be kept in the 'Details of Visit' section at the bottom right of the sheet. In this section visits to Meals on Wheels clients are separated from visits to clients in relation to services other than Home Help and Meals on Wheels.

In the 'Travel Time' box at the bottom right you should record under 'Visits to Other Clients' the total travel time associated with all visits to non Home Help clients today.

#### II) ADMIN./LIAISON WORK

Any time, other than the visiting and travel time already noted in I) above, spent in relation to your section's responsibilities for managing or assessing/allocating services other than Home Help.

### MEETINGS

Organised meetings, probably of at least 30 minutes in length, are of interest here. Impromptu discussions of cases in the coffee room or corridor should not be counted here. You are requested to give brief details of the type of meeting in the right hand section of the sheet e.g. with Area Officer, Area Team meeting, Divisional Home Help/Care meeting, team Home Help/Care Section meeting, etc.

### MISCELLANEOUS

Use this ONLY where the activity in question will fit nowhere else, BUT please remember to describe the activity in the space provided on the right.

### TRAVEL TIME

The daily total travel time spent on visits to Home Help clients and on visits to other clients is recorded separately. All remaining travel time is noted under 'other' e.g. travel to meetings, to see Home Helps, to 'clinics' etc. Use your own judgement in apportioning time where a mixture of visits and other reasons accounted for the journey. This time will also be included in the main activities part of the diary sheet, where it will form part of the total time recorded for the particular activities of which travel time was a necessary part.

CODE BOOK

<u>Card No.</u>	<u>Cols.</u>	<u>Information</u>	<u>Code within COL*</u>
1	1-3	<u>Identity of individual member of staff</u>	001-078
			<u>Note Missing Nos:</u> 009, 018 024, 029 033, 047, 048 049, 053, 058 059, 067, 068 069
	4	<u>Day in week</u>	
		Week 1: M	0
		Tu	1
		W	2
		Th	3
		F	4
		Week 2: M	5
		Tu	6
		W	7
		Th	8
		F	9
1 and 2	5	Card No: 1st	1
		2nd	2
1	6	Week Number one	1
		two	2
1	7	Staff new within last month (otherwise leave blank)	1
	8	<u>FT or PT Employment</u>	
		Full time	blank /
		PT: 30 hr	1
		: 18 hr	2
		: 20 hr	3
		: other	4
	9	<u>Type of Staff</u>	
		Organiser	1
		Supervisor	2
		Clerical	3
	10-11	<u>Area Team</u>	01-15
		(Fourteen area teams, plus one geographical area served divisionally)	
	12	<u>Division</u>	
		Edinburgh	1
		East Lothian	2
		Midlothian	3
		West Lothian	4

TIME USE DATA: Add timings (coded as MINUTES)

CARD 1

COLUMNS:

<u>Activities: Timings</u>	<u>Morning</u>	<u>Afternoon</u>
Visits to home help clients	13-15	16-18
Writing reports	19-21	22-24
Liaison with others concerning home help clients	25-27	28-30
Work allocation: repeat programmes (i.e. no change of duties or hours required by client, or change of HH)	31-33	34-36
: changes	37-39	40-42
Home Help Pay: Client accounts - routine	43-45	46-48
Home Help Pay: Client account queries	49-51	52-54
Home Help recruitment	55-57	58-60
Home Help support or supervision	61-63	64-66
Work related to non home help services (usually meals on wheels or lunch clubs):	67-69	70-72
: Visits to clients		
Work related to non home help services : administration/liaison	73-75	76-78

CARD 2

(Duplicate COLS 1-4)  
( COL 5 Code 2)

Meetings	6-8	9-11
Miscellaneous	12-14	15-17

Visits to Clients

COLUMNS

(For number of visits, enter number  
For total time enter time in minutes  
Otherwise leave blank)

Home Help Clients

First visits: number made	18-19
total time taken	20-22
Review visits: number	23-24
time	25-27
Other visits: number	28-29
time	30-32
Visits where no contact achieved i.e. client out : number	33-34

Meals on Wheels Clients

COLUMNS

All visits: number 35-36  
: time 37-39

Other Services

All visits to clients: number 40-41  
: time 42-44

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Travel Time (minutes)

Visits to home help clients 45-47  
Visits to other clients 48-50  
All other travel 51-53

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Telephone Calls received (enter number)

Home helps 54-55  
Meals on Wheels clients 56-57  
Home help clients 58-59  
Team social worker 60-61  
Health Visitor 62-63  
Divisional headquarters 64-65  
Regional headquarters 66-67  
Other 68-69

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CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
1/1-3		Identity of individual member of staff	3 digit code 001-078	
1/4	1	Day in week		
		<u>Week 1:</u>	0 Monday	04
			1 Tuesday	04
			2 Wednesday	04
			3 Thursday	04
			4 Friday	04
		<u>Week 2:</u>	5 Monday	04
			6 Tuesday	04
			7 Wednesday	04
			8 Thursday	04
			9 Friday	04
1/5		Card Number	1 Card One	640
1/6	2	Week Number	1 One 2 Two	320 320
1/7	3	Staff new within last month	1 Yes Blank	50 590

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
1/8	4	Full-time or Part-time employment	1 Part-time: 30 hour 2 Part-time: 18 hour 3 Part-time: 20 hour 4 Other Blank Full-time	20 40 - - 580
1/9	5	Type of Staff	1 Organizer 2 Supervisor 3 Clerical	170 310 160
1/10-11	6	Area Teams (Fourteen area teams, plus one geographical area covered divisionally)	2 digit code 01-15	
1/12	7	Division  Activities Timings (all timings coded as minutes)	1 Edinburgh 2 East Lothian 3 Midlothian 4 West Lothian	410 70 70 90
			2	

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
1/13-15	8	Visits to home help clients - morning	3 digit code	
1/16-18	9	Visits to home help clients - afternoon	3 digit code	
1/19-21	10	Writing reports - morning	3 digit code	
1/22-24	11	Writing reports - afternoon	3 digit code	
1/25-27	12	Liaison with others concerning home help clients - morning	3 digit code	
1/28-30	13	Liaison with others concerning home help clients - afternoon	3 digit code	
1/31-33	14	Work allocation: repeat programmes (ie no change of duties or hours required by client, or change of HH) - morning	3 digit code	

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
1/34-36	15	Work allocation; repeat programmes (ie. no change of duties or hours required by client, or change of H.H.) - afternoon	3 digit code	
1/37-39	16	changes - morning	3 digit code	
1/40-42	17	changes - afternoon	3 digit code	
1/43-45	18	Home Help Pay: Client accounts - routine - morning	3 digit code	
1/46-48	19	Home Help Pay - Client account routine - afternoon	3 digit code	
1/49-51	20	Home Help Pay - Client account - queries - morning	3 digit code	
1/52-54	21	Home Help Pay - Client account - queries - afternoon	3 digit code	
1/55-57	22	Home Help recruitment - morning	3 digit code	

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
1/58-60	23	Home Help recruitment		
		- afternoon	3 digit code	
1/61-63	24	Home Help support or		
		supervisor - morning	3 digit code	
1/64-66	25	Home Help support or		
		supervisor - afternoon	3 digit code	
1/67-69	26	Work related to non home		
		help services (usually		
		meals or wheels or lunch		
		clubs) visits to clients -		
		morning	3 digit code (column 67 unused)	
1/70-72	27	Work related to non home		
		help services (usually		
		meals or wheels or lunch		
		clubs): visits to clients -		
		afternoon	3 digit code	
1/73-75	28	Work related to non home		
		help services,		
		administration / liaison		
		- morning	3 digit code	
1/76-78	29	Work related to non home		
		help services		

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
		Continued		
1/76-78	29	administration/liaison	3 digit code	
1/79-80		Unused	Unused	
2/1-3		Identity of individual member of staff	3 digit code 001-078	
2/4	1	Day in Week		
		<u>Week 1.</u>	0 Monday	64
			1 Tuesday	64
			2 Wednesday	64
			3 Thursday	64
			4 Friday	64
		<u>Week 2.</u>	5 Monday	64
			6 Tuesday	64
			7 Wednesday	64
			8 Thursday	64
			9 Friday	64
2/5		Card Number	2 Card Two	640
		<u>Visits to Clients</u>		
		(For number of visits, enter number for total time		

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
		Continued		
		enter time in minutes		
		Home Help Clients		
2/18-22	30-31	First visits:		
2/18-19	30	Number made	2 digit code	
2/20-22	31	Total time taken	3 digit code	
2/23-27	32-33	Renew visits		
2/23-24	32	Number made	2 digit code	
2/25-27	33	Total time taken	3 digit code	
2/28-32	34-35	Other visits		
2/28-29	34	Number made	2 digit code	
2/30-32	35	Total time taken	3 digit code	
3/33-34	36	Visits where no contact achieved & client out number	2 digit code	
		Meals or Wheels Clients		
2/35-39	37-38	All visits		

CARD/COLUMN	VAR No	TITLE	CODES	MARGINALS
a/33-36	37	Number made	2 digit code	
a/37-39	38	Total time taken	3 digit code	
a/40-44	39-40	Other services		
a/40-41	39	All visits to clients number	2 digit code (Column 40 Unused)	
a/42-44	40	Total time taken	3 digit code (Column 42 Unused)	
a/45-53	41-42	Travel Time (minutes)		
a/45-47	41	Visits to home help clients	3 digit code	
a/48-50	42	Visits to other clients	3 digit code (Column 48 Unused)	
a/51-53	43	All other travel	3 digit code	
a/54-59	44-51	Telephone calls received (number)		
a/54-55	44	Home helps	2 digit code	
a/56-57	45	Meals on wheels clients	2 digit code	
a/58-59	46	Home help clients	2 digit code	

