



South Coast Education Service District

Work Load/Caseload Committee

Est. 2019

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Background

The workload caseload committee was established during 2018-2019 negotiations during discussions about workload/caseload concerns. Given the unique nature of SCESD's staff, work locations and service models in 10 local districts it is difficult to assess when a staff member's workload/caseload is not in line with professional standards and if management's solutions are appropriate to address the concern.

In October 2019, the workload/caseload committee met to develop the parameters and process for staff to access the committee. September 30, January 15, and March 15.

Collective Bargaining Unit Language

Article 16—Work Load

The District shall attempt to maintain caseloads as recommended by the respective professional organizations which are: School Psychologists, Audiologists, Autism Specialist Consultants, Speech Pathologists, Occupational Therapists, and Physical Therapists. To that end the parties will seat a joint committee of six (6) members, three (3) appointed by the Association and three (3) appointed by the District, which will meet to identify and examine concerns the members want to discuss.

The joint committee will meet on or about September 30, January 15, and March 15. District will consider resolving the caseloads by adding another licensed employee, reassigning staff, or offering an extra duty contract.

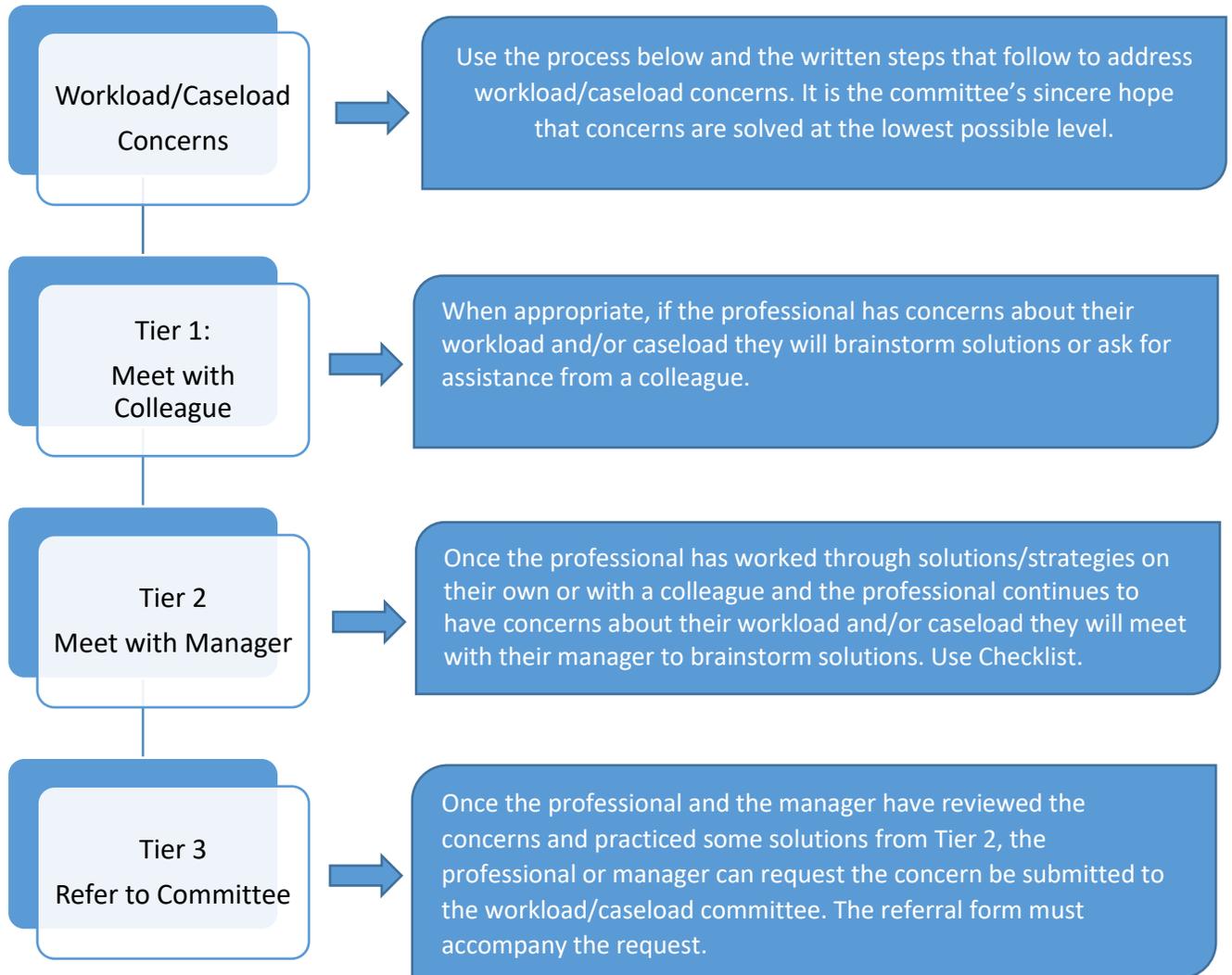
The recommendations are not binding on the District.

Definitions

Caseload: The number of students served.

Workload: The amount of work that a staff member's caseload translates into time and effort.

Visual Process to Access Committee



Written Process to Access Committee

Tier 1

When appropriate, if the professional has concerns about their workload/caseload they will brainstorm solutions or ask for assistance from a colleague. Use the following checklist to discuss potential solutions.

Checklist of items to discuss:

- Number of students
- Number of hours on the IEPs
- Assignment location(s), weight & intensity
- # of evaluations (type)
- Staffing supports available
- Type of service (direct, consult)
- Student: weight & intensity
- Case management/related service
- Articulate the professional's needs (emotions, worries, skill deficits)
- Programmatic concerns
- Prep periods (enough time, time taken up by something)

Tier 2

Once the professional has worked through solutions/strategies on their own or with a colleague and the professional continues to have concerns about their workload/caseload they will meet with their manager to brainstorm solutions. The professional should have documentation of strategies they have tried, pertinent information and data on workload/caseload and potential solutions in mind for the meeting.

The professional and the manager will you the following checklist to consider solutions:

- Review routines/schedules
- Alternative mechanisms of participation
- District expectations
- Adjustments
 - Referral/Dismissal process
 - Reduction of caseload
 - Reduction of locations
 - Increase staff (classified, licensed)
 - Extra Duty contract
 - Clerical supports
 - Increase paperwork days
 - Smarter versus Harder
 - Training and Supports
 - Technological supports
 - Training on how to do something/Shadowing
 - Staff management/delegation

The manager and the professional will develop a written plan of action to include the action items and length of time to work on those items.

Tier 3

Once the professional and the manager have reviewed the concerns and practiced some solutions from Tier 2, the professional or manager can request the concern be submitted to the workload/caseload committee. The referral form must accompany the request.

The following items will be included on the referral form:

1. Complete the request to review workload/caseload at committee
 - a. Describe the primary concern
 - b. Describe the requested solution
 - c. Provide information about strategies attempted, length of time attempted
 - d. Provide data on issue of concern
 - i. Caseload/workload data etc.
 - ii. Travel, paperwork etc.
2. The team will review the requests and determine which cases to hear
3. At the team meeting the employee will be able to present their information to the committee and answer questions from the committee. The manager has the opportunity to attend.
4. Committee will review the information
 - a. Discusses the concerns, solutions and communication plan back to the professional

