

Maximizing Productivity  
of Related Service Staff by Utilizing our  
Workload to Caseload Calculator

For: Ohio Association of Pupil Services Administrators  
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Shift to Workload Approach

September 2013  
Ohio's Special Education Leadership Conference  
Dr. Chuck Carlin's session

- discussed the caseload ratio study
- indicated that limitations in methodology and incomplete data prevented the research team from fully recommending one approach to ODE for universal adoption
- explained that districts needed to come up with a quantifiable method to determine workload duties.

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So we set out to look at workload




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Our goal was to use quantifiable data to consider workload along with caseload to accurately monitor workload on an ongoing basis.



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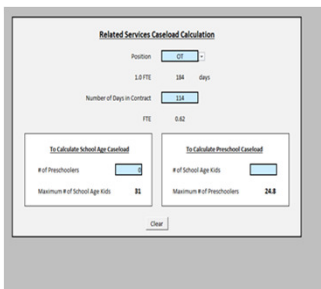
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Our idea was to modify our original calculator that we had used for years to determine caseload based on ratios alone.



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### Why we created our original calculator...

The reason we had created the ratio calculator was due to a requirement in the 2008 standards in section 11 (preschool students with disabilities) Section (H)(8) "Staff serving children with disabilities ages 3 through 5 and [ages] 6 through 21 will have FTE apportioned on the basis of the number of children served in each age category and the percentages totaling 100%."

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Just as a reminder ....

Caseload law in the State of Ohio is set at the following numbers for a 1.0 FTE:

- APE - no more than 100 students
- OT - no more than 50 SA, or 40 PS
- PT - no more than 50 SA, or 40 PS
- SLP - no more than 80 SA, or 50 school age MD/HI/AUT/Ortho/OHI or 50 PS
- School Psych - no more than 125 SA with disabilities, or 75 PS with disabilities

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Now...

We needed to revise our caseload calculator to not only consider the caseload maximums based on the Ohio Administrative Code, but to also consider the workload for an individual service provider based on ALL areas of service listed in Sub-section 1 (a).




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**WE NEEDED A TIME STUDY TO HELP US QUANTIFY THESE AREAS OF SERVICE**

Time Studies were completed by all therapists using a uniform time study log.

- daily log
- one entire work week
- therapists recorded all activities and coded them according to category




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ACTIVITY CATEGORY DESCRIPTIONS

- 1) Direct Service Time** (face to face services with students seeing them for minutes toward their IEP goal. Please note number of students seen during this time.)
- 2) Indirect Service Time** (time spent preparing for Direct Service Time or support of the child in the classroom, planning and material prep/set up, scheduling, discussing particular student with other team members/teachers)
- 3) Case Management Time** (time spent on compliance paperwork as primary case manager)

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ACTIVITY CATEGORY DESCRIPTIONS (cont):

- 4) MSP Documentation** (time spent on ANYTHING related to MSP documentation including co-signing)
- 5) Evaluation Time** (including screening/testing time, observation, records review, discussions with support staff and teachers, scoring)
- 6) Meeting Time** (attending district required meetings, ETR, IEP meetings, etc)
- 7) ETR/IEP Documentation** - Progress Book, Roy Gordon (writing ETR, writing IEP, writing interims and progress reports)

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ACTIVITY CATEGORY DESCRIPTIONS (cont):

- 8) Professional/Colleague Support** (PTA/OTA/CF support such as on-site mentoring, answering phone calls, emails, conversations with staff, tier 3 RtI/IAT)
- 9) Travel Time**
- 10) District Support Time** (lunch duty, parent/teacher conferences, bus duty, hall duty, school committees)

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ACTIVITY CATEGORY DESCRIPTIONS (cont):

- 11) ESC Work** (time sheets/calendars, time allocation, mileage forms, PD forms, pre-observation forms, goal forms, required meetings)
- 12) Professional Development** (Continuing Education)
- 13) Lunch/break**
- 14) Other**

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ANALYZING THE DAILY LOGS

- Category times were totalled individually and were then averaged among the respondents.
- We discovered that the time required to complete most of the areas of service were already captured by the current caseload ratios.
- But the time spent on the following areas of service still needed to be considered to accurately reflect workload...




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ANALYZING THE DAILY LOGS (cont):

Areas of service that needed to be captured:

1. Supervision
2. Travel
3. District Duties
4. IEP Case Management
5. Mandatory meetings and trainings




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ANALYZING THE DAILY LOGS (cont):

So...when considering workload for an individual related service provider there are some important questions to ask!



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IMPORTANT QUESTIONS TO ASK

- On average, how many hours per week do you spend supervising another staff member?
  - OT supervising COTA
  - PT supervising PTA
  - SLP supervising CF



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IMPORTANT QUESTIONS TO ASK (cont):

- On average, how many minutes per week do you spend driving between sites to provide services or supervision on a regular basis?



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IMPORTANT QUESTIONS TO ASK (cont):

- On average, how many hours per week do you perform district duties?
  - Bus Duty
  - Lunch supervision
  - Response to Intervention/MTSS



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IMPORTANT QUESTIONS TO ASK (cont):

- For how many students are you the IEP Case Manager?



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IMPORTANT QUESTIONS TO ASK (cont):

- How many days per year are you required to attend mandatory meetings/trainings?
  - Opening Meeting
  - NCI (CPI)
  - TCI



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