

WEIGHTED CASELOADS

A MUSTARD SEED PILOT PROJECT

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**THE
MUSTARD
SEED**



WHAT IS A WEIGHTED CASELOAD?

- A weighted caseload considers the barriers clients face towards achieving a specific goal
- Goals are diverse, in our sector it frequently looks like sustainable employment, finding housing, maintaining housing, addictions recovery
- Weighted caseloads seek to afford clients the time they need to move forward
- Unlike traditional models, caseworkers will not have a fixed number of clients, rather they have a fixed amount of time that they can work with clients

HOW DID WE GET HERE?

- Higher needs' clients were underserved
- Wide range in time clients require from caseworker
- Issues around equity and burnout for caseworkers
- Fresh eyes on old problems

THE BASICS OF A WEIGHTED CASELOAD

| Barrier | Client 'X' Score (1-5) | Maximum Possible Score (1-5) |
|--------------|------------------------|------------------------------|
| Addictions | 1 | 5 |
| Age | 1 | 5 |
| Confidence | 5 | 5 |
| Independence | 5 | 5 |
| Total | 12 | 20 |

$$\begin{array}{ccccccc} 12 & / & 20 & * & 100 & = & 60\% \text{ Acuity} \\ \text{Client 'X' Score} & & \text{Maximum Possible Score} & & & & \end{array}$$

OUR LEARNING PROCESS

Are some barriers more of an issue depending on the program goal?
e.g. criminal records for maintaining housing vs obtaining sustainable employment

Surveyed 17 employment support workers from various organizations in Calgary

Compiled results to gain an average 'weight' of each identified barrier

Multiplied the barrier weights by the client's score within that barrier

Created a user friendly 'tool' for everyday use and to maximize the benefits of collecting data



A word cloud of various social and health factors. The words are arranged in a roughly circular pattern, with some larger than others. The background is white with a dark brown wavy border on the left and a yellow vertical bar on the right.

Physical Health
Mental Health
Criminal History
Confidence
Essential Skills
English Language Proficiency
Homelessness History
Work History
Motivation
Country Status
Health Supports
Education Level
Housing Supports
Independence
Gender
Age
Sexual Orientation
Driver's License
Employment Status
Ethnicity
Presentation

OUR MODEL

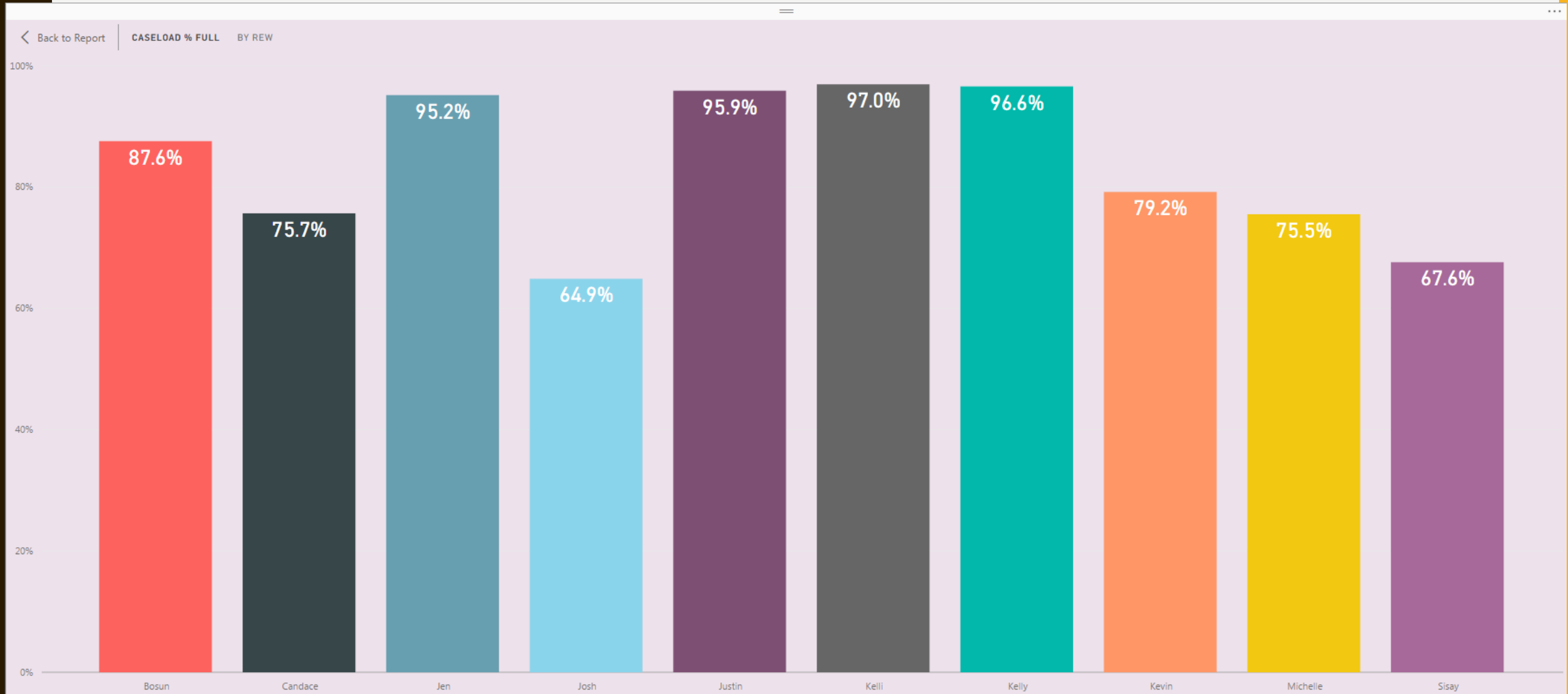
| Barrier | Barrier Weight (1-5) | Client 'X' Score (1-5) | Client 'X' Score * Barrier Weight | Maximum Possible Score |
|--------------|----------------------|------------------------|-----------------------------------|------------------------|
| Addictions | 5 | 1 | 5 | 25 |
| Age | 4 | 1 | 4 | 20 |
| Confidence | 1 | 5 | 5 | 5 |
| Independence | 1 | 5 | 5 | 5 |
| Total | | | 19 | 55 |

$$\begin{array}{ccccccc} 19 & / & 55 & * & 100 & = & 34.6\% \text{ Acuity} \\ \text{Client 'X' Score} & & \text{Maximum Score} & & & & \end{array}$$

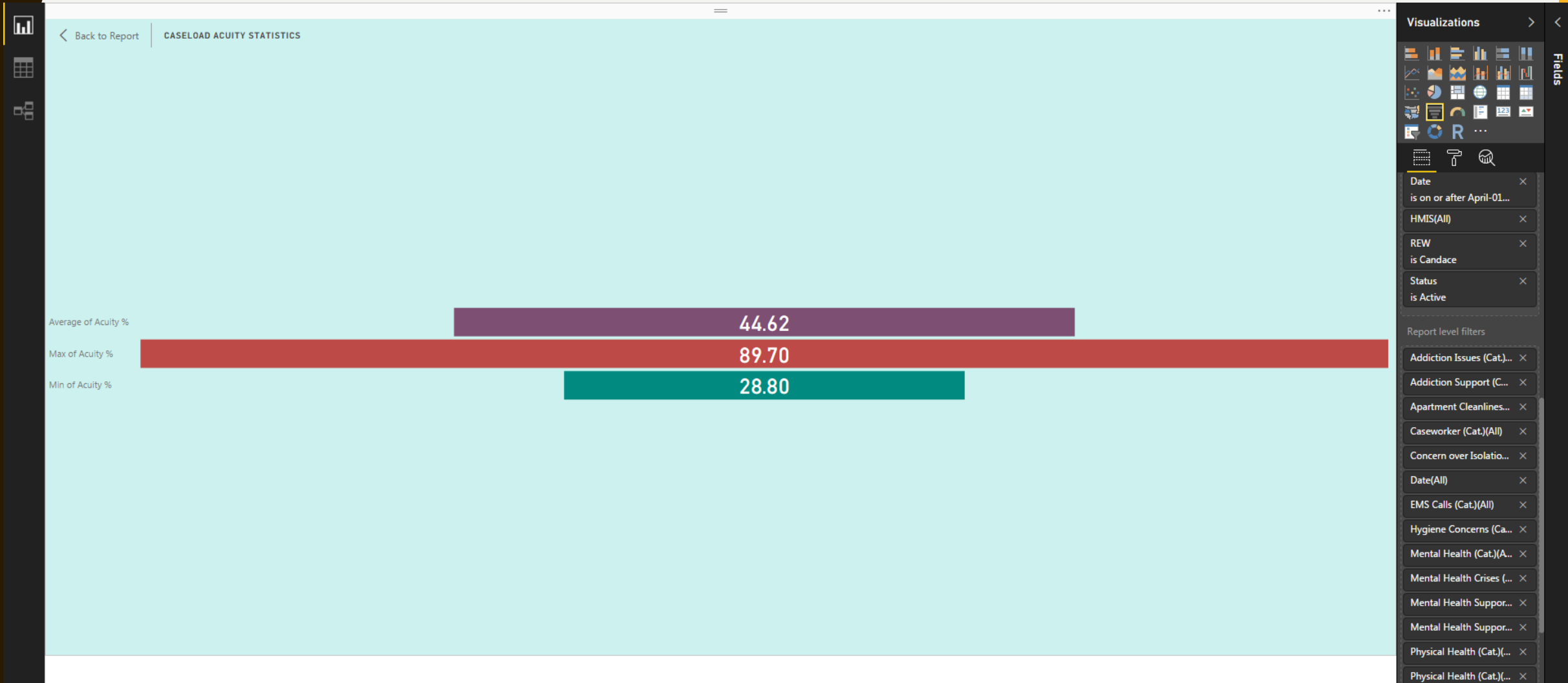
OUR PROCESS



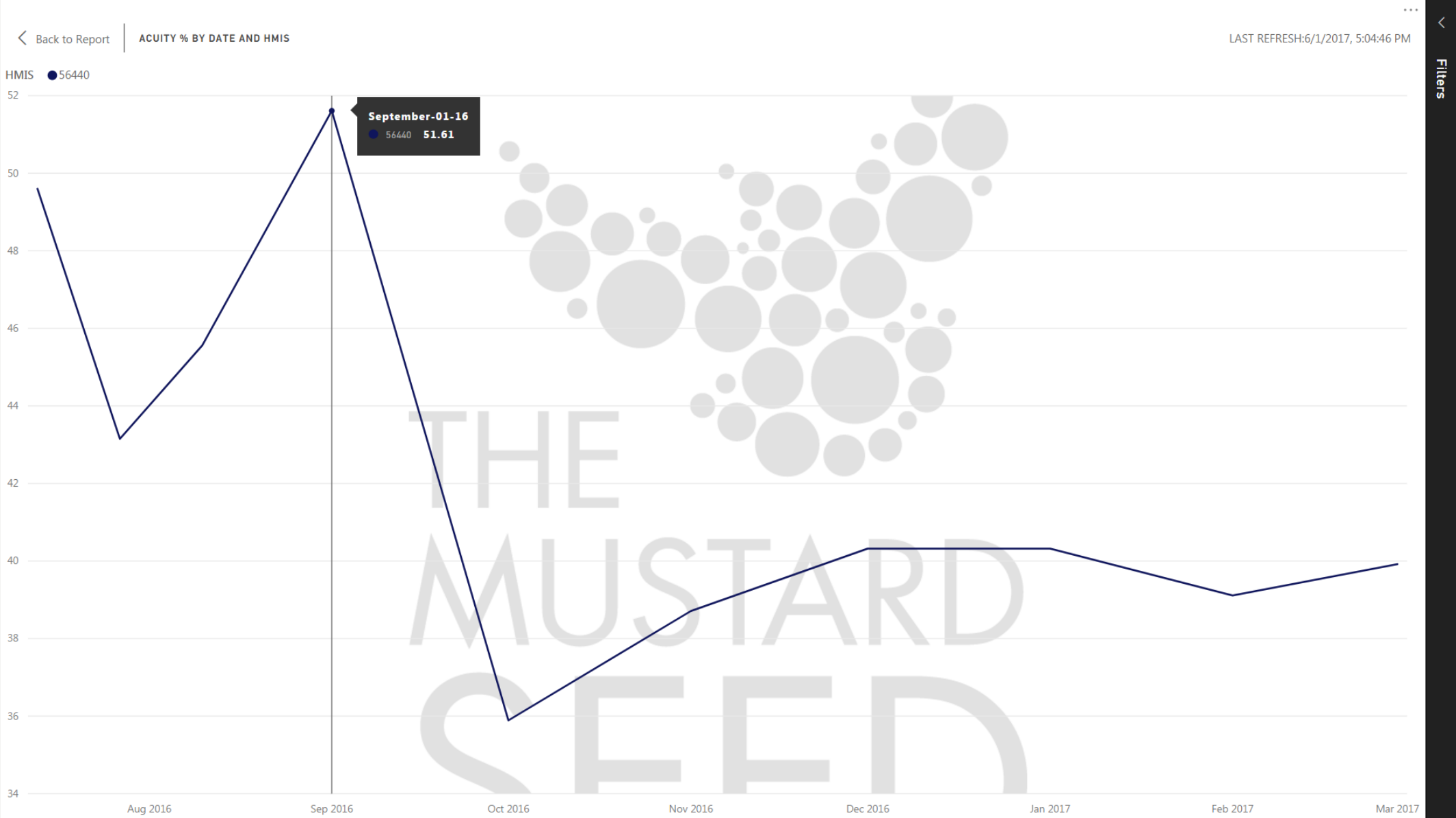
Application: Case Management



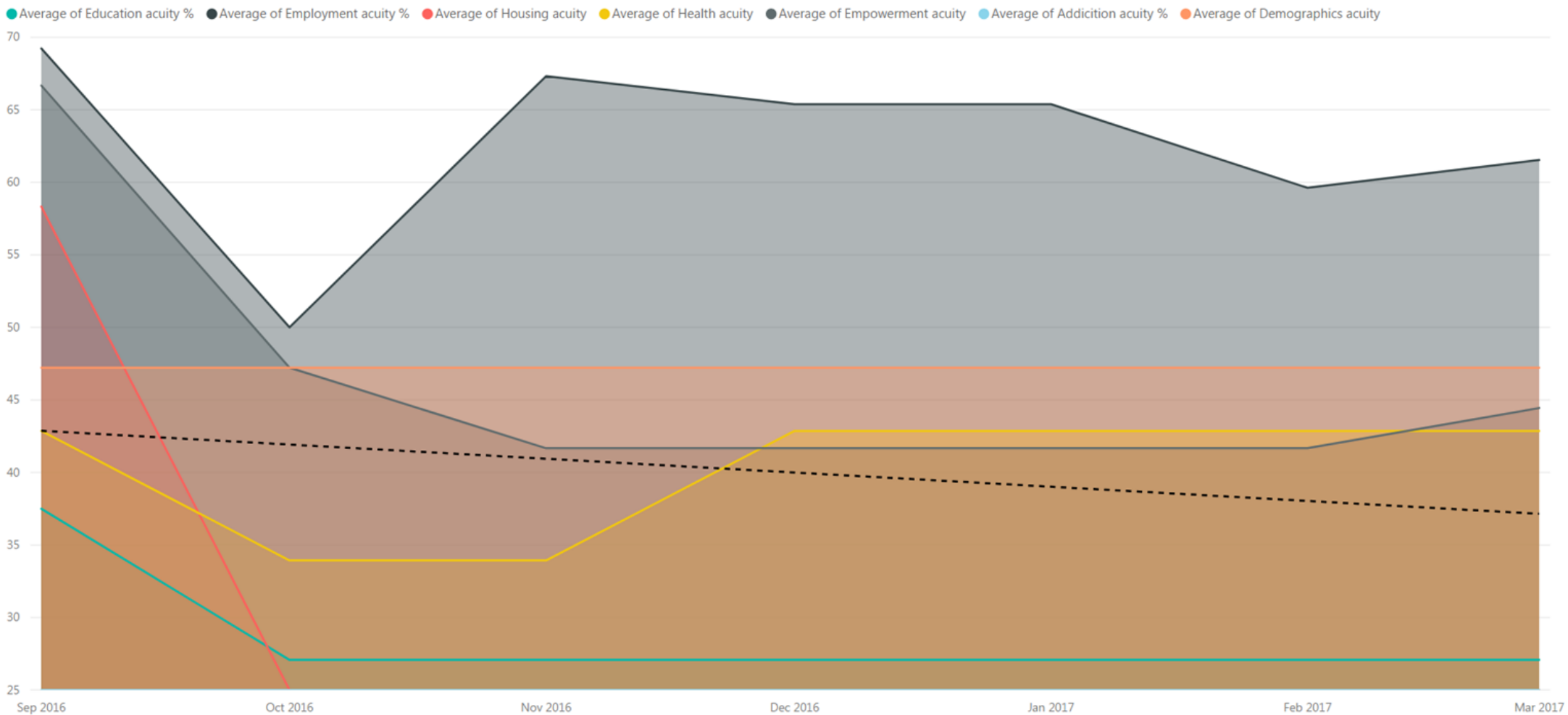
Application: Case Management



Application: Client Management



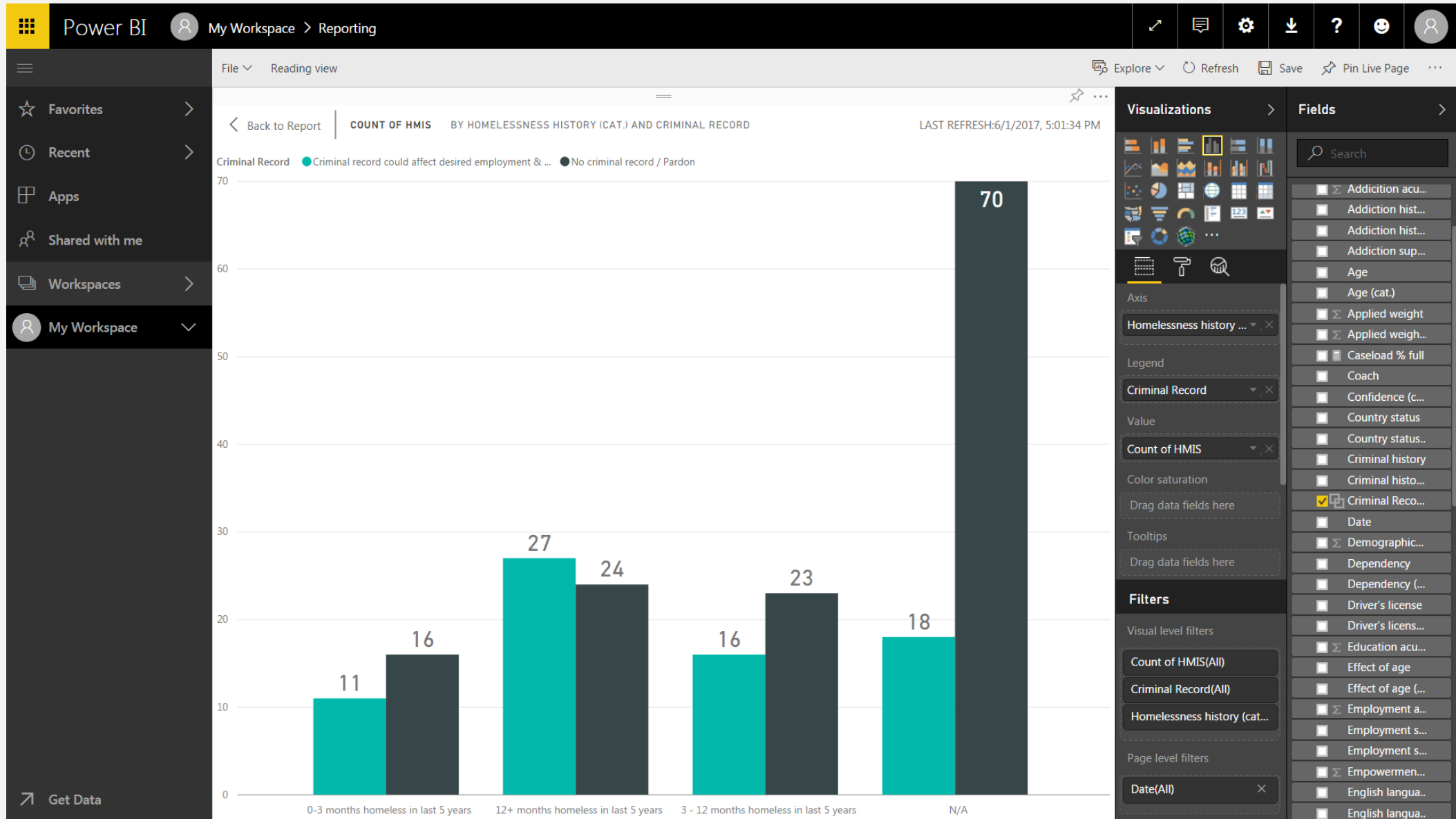
Application: Client Management



Source: Reporting

Filters

Application: Data Management



PRELIMINARY RESULTS

- Prior success rate: 15.3% clients graduated the program *Employment Program July 2015-December 2015 (18/118)
- Use of the tool: 19.2% clients graduated the program * Employment Program July 2016-December 2016 (15/78)
- The overall rate of increase: 20.3%

COMPARING MODELS

Traditional Caseload Models

- Assumes that all clients require the same amount of time
- Fixed number of clients on caseload
- Managers/Supervisors assign according to perceived space
- Caseworkers frequently report stress and inability to adequately serve high acuity clients
- Often takes a quantity over quality approach to achieve objectives

Weighted Caseloads

- Attempts to afford clients time with caseworker according to barriers
- Number of clients on caseload varies according to acuity
- Managers/Supervisors assign according to caseworker strengths and caseload capacity
- Ability to track acuity
- Can be used to better understand staff performance
- Provides a quality over quantity approach to achieving objectives
- Client success rate is the focus



Thank you & Questions

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