

# Related Services Update

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## Managing Workloads

Determining the role of the related service provider and the time needed for the provider can be challenging for providers and for schools. Traditionally, schools have determined the amount of time needed for a therapist based on the number of students on their caseload, using a caseload approach. A caseload approach typically sets a limit to the number of students and schools a therapist can provide service to directly or as a consultant. A caseload approach refers only to the number of students seen directly by a related services provider as part of the IEP.

While a caseload approach might appear to be the simpler approach to managing a therapist's time; this approach can be very limiting to schools, therapists, and students. Limitations can include: large grouping of students, inappropriate groupings of students, only providing direct intervention, no opportunities for generalization, observation, or consultation, only serving students on the caseload; not addressing early intervening approaches.

No federal laws exist that mandate requirements for managing therapy workloads. Workload issues are typically dealt with at the state and/or local school district level.

Below are four steps for analyzing the workload for a related service provider (Jackson, 2013).

### Step 1 – Brainstorming

The team begins by brainstorming everything the provider is expected to do as a related service provider. Examples include: performing evaluations, documentation, intervention, screenings, meetings, trainings, travel, IEP development, transition services, professional development, school-wide activities.

### Step 2 – Complete a Schedule

Next, the team should complete a schedule for the week, listing the amount of time spent for each student. Add other activities that are required on the student's behalf as well as other responsibilities. Analyze this information to see whether these required activities and student's services are possible within the schedule work hours.

### Step 3 - Categorize

Look at the completed schedule and group the activities into various categories. The categories might include: student specific services (e.g., evaluations, meetings, paperwork, travel), service management (e.g., staff management, professional development), teaching and training others, and research activities.

#### This issue:

- Managing Workloads
- Upcoming trainings
- Questions/Technical Assistance
- Current openings
- Emerging leaders

#### Step 4 – Analyze the Results

Once the data is collected, the data can be used to make decisions on provider's productivity and need for more/less supports. The team can use this data to make a plan on how to better meet the needs of the provider's workload. Factors that can influence workload include: type of work that has to be done, resources required to do the work, requests for services or referrals from all sources, and skills and competencies needed to carry out the work.

Jackson, L. L. (2013). Best Practices in Determining School Workloads. In G. F. Clark, & B. E. Chandler, *Best Practices for Occupational Therapy in Schools* (pp. 131-139). Bethesda: American Occupational Therapy Association.

#### Upcoming Trainings & Resources

**November 13-14, 2018 – Oklahoma Statewide Autism Conference, Midwest City, OK**

To Register: <https://okautism.org/AnnualConference.aspx>

#### Technical Assistance

If you or your district, need any clarification on related services, looking for related service providers, and/or have a team member with questions about role of related service providers, give us a shout! [twarwick@todaystherapysolutions.com](mailto:twarwick@todaystherapysolutions.com)

#### Current Openings!

Five Star Interlocal (Cushing, OK)– In need of speech pathology services, contact: Nancy Anderson at [nanderson@fsilc.k12.ok.us](mailto:nanderson@fsilc.k12.ok.us)

Coleman Public Schools – In need of a contract speech pathologist one day per week, contact Sherry Morris at [sherry.morris@coleman.k12.ok.us](mailto:sherry.morris@coleman.k12.ok.us).

Coleman Public Schools

If you know of any school needing coverage, let us know and we will include the information on the newsletter!

