Introduction
The purpose of this briefing is to look at workload weighting as one system of workload management. If you are finding managing your work and your caseload difficult due to demand and time available, you should in the first instance discuss your difficulties with your supervisor or line manager.

For the purpose of this briefing it is important to recognise the different between caseload and workload. Caseload is the number of active cases a practitioner holds and manages. Workload includes the time spent on the caseload along with all other tasks expected of them, including those not directly related to caseload management.

Definition
‘Workload weighting’ can be referred to as a caseload management tool to monitor case throughput and allocation, aiding and establishing the appropriate number of cases to hours worked per week.

It attributes weightings to a variety of activities and therefore will need to be adjusted to fit particular work environments. Weightings usually measure a number of factors including risk and complexity. Travel may be included for community settings. The experience of the practitioner may also be considered.

What does workload weighting mean for managers?
- A means of managing and allocating demand for service
- A way of understanding why some staff can only manage a few cases each month whilst others manage more
- It could help managers retain staff as they feel they have a manageable workload and know how many cases managers can allocate a month
- It can help managers rationalise what other activities team members can participate in and the impact of this on caseload
- It provides managers with an opportunity to observe practitioner’s team involvement.

What does workload weighting mean for practitioners?
- Having a realistic workload
- It helps manage workload and fear of being overloaded
- A way of managing demand that is fair and manageable as well as being transparent across the team
- A tool to support practitioners because it recognises and accommodates additional workload tasks when considering caseload management and allocation.

What are the ingredients of a successful system?
- It needs to be owned by both practitioners and managers – joint responsibilities
- Managers must be prepared to question why cases need to stay open
• Allocation rates for whole time equivalent (WTE) practitioners need to be set on a pro-rata basis for part-time staff – transparency
• Allocations need to be negotiated on both sides
• Practitioners need to feel caseloads are manageable.

Outcomes of good workload weighting
• Staff know what is expected
• May lead to reviewing what tasks support staff undertake
• Staff competencies matched to tasks
• Reduction in stress experienced by workforce
• Transparent system – all treated fairly
• Effective, well managed teams
• Satisfied customers
• It can provide evidence to the practitioner and their supervisor of continuing professional development.

Additional considerations
The Code of ethics and professional conduct (2015) states regarding:

Professional competence:
5.1: You must only provide services and use techniques for which you are qualified by education, training and/or experience. These must be within your professional competence, appropriate to the needs of the service user and relate to your terms of employment.

Capacity:
5.1.4: If you are asked to take on additional tasks, such duties should only be undertaken after discussion, considering additional planning, support, supervision and/or training.

Delegation:
5.2: If you delegate interventions or other procedures you should be satisfied that the person to whom you are delegating is competent to carry them out. In these circumstances, you, as the delegating practitioner, retain responsibility for the occupational therapy care provided to the service user.

Resources
NHS evidence search workload weighting
https://www.evidence.nhs.uk/Search?q=workload+weighting

Social Care Institute for Excellence

The Kings Fund