

This tool is designed to help service providers assess their caseload by evaluating key factors such as client contact frequency, client needs, intervention complexity, personal competence, and other variables that influence workload and service delivery quality.

## 1. Client Contact Frequency

- How many individuals are you currently supporting? \_\_\_\_\_
- On average, how often do you interact with clients? \_\_\_\_\_
- On average, how much time do you spend with each client per visit or interaction? \_\_\_\_\_

### Reflection

Based on your responses to the questions above, reflect on your psychological, emotional, and mental capacity to provide quality service:

- **High caseload and frequent, lengthy interactions** may indicate that you are stretched thin, which could impact your ability to maintain emotional well-being, provide adequate care, and engage meaningfully with each client.
- **Moderate caseload with balanced frequency and time spent** on interactions suggests that you may have sufficient capacity to offer quality service, though it's important to remain vigilant for signs of burnout or stress.
- **Low frequency or minimal time per client** could suggest a need for more engagement, but you must also ensure that you have the emotional and psychological capacity to handle this without overburdening yourself.

## 2. Client Needs and Response Difficulty

What are the needs and resources available in the community? List them below.

NEEDS	RESOURCES

On a scale of 1-5, roughly assess the following based on the individuals under your care:

<b>Level of independent life skills</b>	Highly independent	1	2	3	4	5	Highly dependent
<b>Level of risk to self</b>	No Risk	1	2	3	4	5	High Risk
<b>Level of overall health</b>	Excellent	1	2	3	4	5	Poor
<b>Level of social supports</b>	Well-supported	1	2	3	4	5	Highly isolated
<b>Level of engagement</b>	Highly engaged	1	2	3	4	5	Highly disengaged

## Result Interpretation

- **5–9 (Low Needs/Low Response Difficulty):** You may be able to provide standard support and interventions with ease.
- **10–15 (Moderate Needs/Moderate Response Difficulty):** There are some challenges in independence, health, engagement, or risk, which may require more resources, coordination, or ongoing support.
- **16–20 (High Needs/High Response Difficulty):** Additional resources, time, and attention will be required to meet the client’s needs.
- **21–25 (Very High Needs/Very High Response Difficulty):** The level of care required is likely complex, and a high level of intervention will be necessary.

*Reflect on your capacity and consider other resources for assistance or reducing the number of individuals in your care.*

### 3. Intervention (Support) Type

<b>What type of supports are needed? (Select all that apply)</b>	Counselling    Medical support Personal care    Housing security Referral    Crisis Intervention Other: _____
<b>How complex is the support being provided?</b>	Simple    Moderate Complex    Highly complex
<b>How much time is needed to deliver the intervention?</b>	

#### Reflection

Based on your responses to the questions above, reflect on your psychological, emotional, and mental capacity to provide quality service:

- How do you feel about the type of support required? Do you feel confident in providing the level of assistance, or does it feel overwhelming at times?
- How does the complexity of the support affect your emotional and mental well-being? Are there aspects that feel particularly challenging, and if so, how might they be addressed?
- How do you manage the time needed for each intervention? Do you feel like the time required is reasonable, or is there a risk of burnout due to time pressure?

## 4. Competence

- How much experience do you have in a similar role? \_\_\_\_\_ years
- What type of training have you participated in related to this role?

### Reflection

- How confident do you feel in your ability to perform the tasks required in your role based on your years of experience and training? Are there areas where you still feel unsure or need improvement?
- How do you manage situations that challenge your level of experience? Do you seek assistance, rely on past experience, or handle them independently?
- If you were to identify one area that could benefit most from additional training, what would it be and how would this help you in your current role?

## 5. Caseload Maturity

How many intakes are you currently accepting?	None 1-10	11-20 More than 20
How many are ongoing?	None 1-10	11-20 More than 20
How many are follow-ups or just check-ins?	None 1-10	11-20 More than 20

### Reflection

- **Early-stage:** How are you managing the time and emotional energy needed for new intakes?
- **Mid-stage (Ongoing):** Are you managing consistent communication or is there a risk of disengagement? How do you manage ongoing progress assessments to ensure the effectiveness of interventions or supports?
- **Late-stage:** How do you balance periodic check-ins to maintain support without overwhelming clients who are becoming more independent? Are the appropriate resources or support systems in place for a clear plan for discharge?

## 6. Location of Clients

For individuals that require home visits, how much time do you typically spend traveling?	Less than 1hr 1 to 2hrs	2 to 3hrs More than 3hrs
How often do you conduct home visits or outreach?	Less than 1hr 1 to 2hrs	2 to 3hrs More than 3hrs

### Reflection

- What are some ways to adjust your schedule to make travel more efficient?
- What are some opportunities to reduce the frequency of home visits while maintaining quality of service? Could some visits be replaced with phone calls?

## 7. Caseload Maturity

What other duties do you have besides providing client services?

What proportion of your work time is allocated to these other duties?	Less than 25% 25% to 50%	51% to 75% More than 75%
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### Reflection

- How do you feel about your current workload and time? Are there specific tasks consuming most of your time?
- What changes could you suggest to your supervisor that would help you manage your caseload more effectively? Can you delegate certain tasks or adjust your priorities?