**This page contains relevant guidance and materials to help you run a similar project in your service.**

**Project:** Casework Management

**Local Authority:** London Borough of Lewisham

**Details:**

*Why the work was done*

The HRA & new reporting requirements placed additional strain on the service. Average caseloads for officers were high which was causing stress and making it difficult to provide meaningful person-centred support for every client. The team had been monitoring open cases, team and officer caseloads which had flagged up significant variation amongst officers. A short discovery was completed to better understand the casework management issues from the officer’s perspective and how they prioritised and managed their caseloads.

*Problem to be solved*

How might we deal with increased caseloads, and its impact on officers, in a sustainable way?

*Who the users are and what they need to do*

Users are case holding officers, team leaders and service managers. We needed to understand what users do now. In particular:

* What are the specific issues for officers (case holding and team leaders)? Is there variation depending on case type?
* How do officers currently prioritise their casework time? Does this work for them? Do they feel it is clear what they should be doing?
* Why are some officers managing better than others?
* What is the current extent and frequency of partner agency and other teams’ involvement in casework?
* How do cases move through the service?
* How much time is spent on cases?
* What is the impact of casework management issues on customer outcomes?
* What is the role of the CMS? Is it helping or hindering?

**Resources available:**

* **Discovery/ prototyping planning spreadsheet –** including goals of the discovery phase, discussion guides for the user research and how we analysed relevant data inc. caseload modelling
* **Time and motion template –** to replicate the exercise
* **Research results templates –** for presenting results from officer interviews and the time and motion exercise

**Relevant insights for others:**

* Importance of clear standards around casework management
* If the CMS has a dashboard/ reporting facility for officers to view their caseloads – need to ensure this is accurate and aligned to what management are monitoring
* Need to protect casework time on the rota. Due to cover, leave, sickness etc. officers often not getting the time they were allocated so need to plan for this
* Officers appreciated a narrow focus/ specialisation e.g. not moving between roles like duty, managing certain inboxes etc. This enables them to be productive in the time allocated for casework
* Include and protect supervision time – managers should role play this as well
* Officers often have their own individual methods for managing caseloads and prioritising. Service standards and expectations should accommodate this where they can
* Provide opportunities to facilitate knowledge share amongst officers around managing caseloads e.g. reflective practice sessions
* Longer-term rotas preferred over short-term (e.g. weekly). Enables planning of casework and client meetings well in advance
* Admin support roles have are useful but need to be selective about what they take on so they “support” rather than “duplicate”