



## Quality Management Committee Resolution

### QMC.002 – Fair Distribution of Workload Resolution

3rd Committee (2022-2023)

**Sponsor:** Wyatt Haro      **Introduced:** February 1, 2023      **Status:** Quashed [End]

#### SECTION 1. SHORT TITLE.

This Resolution may be cited as the “Fair Distribution of Workload Resolution”.

#### SEC. 2. FINDINGS.

Quality Management Committee finds the following:

- (1) The methods currently used by Ryan White case management to assign clients to case loads distributes unevenly among the case managers, resulting in higher case loads for some case managers, thereby reducing quality of services to clients.
- (2) In addition to service quality degradation, data entry quality is impacted when case managers have unbalanced caseloads.
- (3) In a recent change to the Ryan White Part A program policies enacted by the Central Florida HIV Planning Council, Medical Case Managers should have a maximum of 30 clients on their case load, which went into effect March 1, 2022 at the start of the 2022-2023 fiscal year.
- (4) Case managers have been found to have the ability to open cases at their discretion, increasing the chances that a case manager may find their case load to be much larger than their colleague.
- (5) In surveys conducted by the Quality Management Program, employees report a dissatisfaction with the fairness of the distribution of work.

#### SEC. 3. REVIEW OF CURRENT CASE MANAGEMENT ASSIGNMENT PROCEDURE.

(a) IN GENERAL.— Not later than 90 days after the date of enactment of this resolution, the Executive Director should instruct all Program Managers to provide to the Quality Management Committee (“Committee”) the following—

- (1) Current policies and procedures in place for the assignment of clients to case managers, including—
  - (i) Who has the authority to assign clients and/or open clients with the agency.
  - (ii) How far a case manager is expected to travel to meet a client.
  - (iii) How case loads are reviewed for possible client reassignments.
  - (iv) How often a case load is reviewed.
  - (v) Procedures case managers follow to request a case management transfer.
  - (vi) Procedures case managers follow to close a client’s case and services with the agency.
- (2) Current case load totals for all case managers.
- (3) Total number of clients receiving services outside the county the case manager occupies an office in.

#### SEC. 4. GUIDANCE.

(a) GUIDANCE FOR EXECUTIVE DIRECTOR AND PROGRAM MANAGERS.— The Executive Director shall issue guidance for Program Managers to submit requested information to the committee not later than 90 days after the after the 90 day period in SEC. 3.(a)—

- (1) Program Managers should make readily available to the Committee all requested documents for review by the Committee in hard copy and/or digital copy format.
  - (2) Program Managers should explain procedures and methods in a summarized report if they lack official documentation of these procedures.
- (b) The Committee shall appoint a Workgroup consisting of case managers and/or leadership, under the direction of the Quality Management Program Manager, to review all procedures and policies and provide the Committee with any proposals for modifications.
- (1) The Workgroup shall be a group of at least three (3) people in addition to the Quality Management Program Manager.
  - (2) The Workgroup shall be granted a minimum of two (2) hours each week to meet without disruption to conduct review and assessment.
  - (3) The Workgroup shall be provided a workspace for meetings as available and when needed.
    - (i) The Workgroup may conduct some meetings via telephone or video conferencing, in addition to in-person meetings.

**SEC. 6. ENFORCEMENT.**

- (a) Not later than 180 days after the enactment of this resolution, the Executive Director should determine if all documentation has been provided to the Committee.
- (b) The Workgroup described in SEC. 7.(b) shall conduct a review of all documentation received and notify the Committee of missing documentation or additional documentation requests.
- (c) The Workgroup will be provided a time, no longer than 90 days, to conduct their review and assessment of policies and procedures.
  - a. Time shall be allotted to the Workgroup members as described in SEC. 7.(b)(2) by agency leadership.
- (d) At any time, the Committee may demand a progress report from the Workgroup and will provide a day and time for the presentation of the final report of the Workgroup to the full Committee.
- (e) The Workgroup shall be dissolved at the conclusion of the review and assessment.

**SEC. 7. INTENDED PURPOSE.**

- (a) It is the intention of the Quality Management Committee to foster a work environment where employees do not feel that they are carrying more of the work load than their colleagues.
- (b) It is the intention of the Quality Management Committee to study and review policies and procedures for areas of improvement or correction of flawed or outdated policies and procedures.
- (c) It is the intention of the Quality Management Committee to ensure the ability of a case manager and agency staff to provide the highest quality of service to the client, while preventing case manager and agency staff burnout, "compassion fatigue," and encouraging self-care.