

Decision Item #20: INCREASE MAXIMUM CASELOADS FOR OCCUPATIONAL THERAPISTS OR ELIMINATE THE USE OF THERAPY ASSISTANTS

Background: As required by federal and state law, the District provides occupational therapy and physical therapy as related services when the child needs therapy to function in the education setting and when documented in a student's Individualized Education Plan (IEP). The Department's 2001-2002 budget includes allocation for 15.7 occupational therapy assistants, 22.7 occupational therapists, 18.75 physical therapists, and .6 physical therapist assistants.

The Wisconsin Department of Public Instruction (DPI) has the following caseload standards for occupational and physical therapists:

- A. A minimum of 15 children
- B. A maximum of 30 children
- C. A maximum of 45 children with one or more occupational therapy assistants

However, the Collective Bargaining Agreement (CBA) is more restrictive. The CBA indicates that a therapist with an assistant will carry a maximum caseload of 40 children, compared with the DPI recommended maximum caseload of 45. In addition, the CBA further restricts assignments, indicating that therapists will not be assigned to more than four schools. As a result of this restriction, a 1.0 therapist may be allocated to four schools whose combined caseload alone does not require a 1.0 therapist.

There are two options available to the District to restructure therapy students:

Option A: Increase the maximum caseload with assistant to DPI standard of 45

Option B: Discontinue the use of therapist assistants and assign all therapists a caseload of 30

Expenditures: For purposes of this analysis, the department's projections for 2002-2003 were used, to ensure that changes in overall therapist requirements are accounted for. Based on anticipated enrollment projections for 2002-2003, the current CBA allocation model would require 22.6 occupational therapists and 13.7 occupational therapist assistants, for an estimated total expenditure of approximately \$2.2 million.

Revenues: (Department-wide) The District does receive Federal Entitlements (IDEA Flow-Through) as well as categorical IDEA Grants and State Aid. Entitlement funds are based on an unduplicated head count. Categorical aids reimburse based on expenditures (at the rate of approximately 30%). Total budgeted revenue from federal entitlements in 2001-2002 is approximately \$3 million, with an additional \$200,000 in categorical revenue and \$17 million in categorical state aid. The District receives categorical aids of approximately 30 percent of expenditures for these staff positions. In addition, the District receives annual Medicaid reimbursement for direct services including occupational and physical therapy. In the 2000-2001 school year, the District received \$166,513 for occupational therapy and \$121,574 for physical therapy.

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FTE: **Option A: Reduction of 1.75 FTE Occupational Therapists**
Option B: Reduction of 14.25 FTE Occupational Therapist Assistants, partially offset by an increase of 6.85 Occupational Therapists

Anticipated Savings: Savings (including an offsetting reduction of 30 percent of categorical aids) are anticipated to be:

Option A: \$94,763
Option B: \$245,030

Summary	OT FTE	OT \$	TA FTE	TA \$	Total Cost	Costs Avoided	Categorical Aid	Net Savings
Current Allocation Method	22.06	\$ 1,382,588	14.25	\$ 813,204	\$ 2,195,792	\$ -	\$ -	\$ -
Cap to 45 with TA	19.90	\$ 1,247,213	14.25	\$ 813,204	\$ 2,060,417	\$ 135,376	\$ (40,613)	\$ 94,763
No TA's, Cap at 30	29.45	\$ 1,845,749	0.00	\$ -	\$ 1,845,749	\$ 350,043	\$ (105,013)	\$ 245,030

Student Impact: There would be no effect on Medicaid revenue, as the same number of students would be served. Therapists are directly engaged in providing services to students, as required in the child's IEP. However, because the District could implement either alternative and maintain the DPI recommend maximum caseloads, there should be minimal negative impact on students for either alternative.

Strategic Priorities: NA

Board Priorities: NA

Other Considerations: While it is not cost beneficial to use therapist assistants, the market for assistants has historically been less tight than for therapists. Several years ago, physical and occupational therapists were difficult for school districts to attract, and the use of therapist assistants allowed the District to ensure that services were not compromised as a result of the labor market. While the current market for therapists is not tight, it is conceivable that the market could change.

Implementing Option A would require a change to the collective bargaining agreement. The CBA currently restricts therapists to a maximum caseload of 40 (with assistant) and a maximum of four schools. These restrictions would need to be removed from the CBA for Option A to be feasible.