

*Welcome to the fifth installment in the WIC Outreach Planning Series, **Caseload Management**. This is one of six focus areas to support local agencies in developing a strategic, comprehensive outreach plan to build and sustain caseload, and improve delivery of service.*

Caseload Management Strategy & Resources

Caseload growth is possible! New resources are available to support local agency efforts to maintain and improve caseload using a team approach. A big thank you goes out to **Washington and Linn County WIC** for piloting this new approach.

Overview of the Steps Involved:

1. Share Caseload Basics with Staff -

Talk with staff about caseload basics and its importance. An In-service Session Guide and PowerPoint have been created to help WIC Coordinators facilitate a discussion and share local caseload characteristics with staff (see the link on page 2 for these resources).



- 2. Discuss Caseload Issues & Solutions** - Talk with staff about issues that affect caseload. Use the Caseload Improvement Planning Document (see link on page 2) as a guide to identify issues, their impact on caseload, considerations, and possible solutions. This document helps staff sort through a variety of areas that may need attention, such as wait time on phones, office hours, customer service, outreach, show rates, and appointment availability. If you are a larger agency, consider identifying a caseload team of five to six for each site (including both certifiers and support staff) to accomplish the initial review before engaging the entire staff in caseload conversations.
- 3. Select Caseload Action Steps** – As a team, prioritize and select reasonable and achievable action steps. Identify who will be involved, the timeline, and what you plan to do. Then implement, evaluate, and adjust as needed.

Listed below are the caseload management resources. Click this link: [Link to WIC Caseload Resources](#) to access the first three resources on the Oregon WIC website. These resources can also be located at healthoregon.org/wic under For Oregon WIC Staff, WIC Coordinator Resources, Caseload Management.

Oregon WIC Caseload Management Resources:

- **Local Agency Caseload In-service Session Guide** – This guide offers learning activities to help facilitate a staff in-service on caseload management.
- **Presentation: Focus on County WIC Caseload** – A PowerPoint template providing an overview of caseload basics. Local data will need to be added.
- **Caseload Improvement Planning Document** – A guide to help identify caseload considerations and proposed solutions.
- **TWIST Caseload Reports** – A summary of reports available in TWIST that provide data and information to assist with caseload management.



*The key to successful caseload management
is using a team approach.*