



Increasing Job Coach Caseloads Without Sacrificing Quality

A Guide to Efficient Service Delivery in Competitive Integrated Employment

Competitive integrated employment programs must balance **caseload size** with service quality. Research and guidelines generally recommend a caseload of about 20 individuals per full-time job coach for intensive supports. For example, the evidence-based IPS model for supported employment (originally in mental health) sets *20 clients* as an upper limit to ensure “intense services”. However, with efficiency measures in place, programs can extend this toward *25-26 clients* without sacrificing outcomes. In fact, a “perfect score” on one supported employment fidelity scale still allows caseloads “*up to 25 consumers*” per specialist. Pushing slightly beyond 20 requires strategic adjustments in scheduling, documentation, and travel routines. Below we outline how **session planning**, **streamlined documentation**, and **travel optimization** can enable a job coach to handle ~26 IDD clients per month while maintaining high-quality support.

Session Planning and Schedule Optimization

Careful scheduling of coaching sessions can significantly expand a coach’s capacity. Key tactics include limiting session frequency per client and timing meetings strategically based on need. Studies of long-term supported employment show that once individuals are stabilized in a job, they typically do *not* require weekly in-person meetings; on average, **about two contacts per month** may suffice for ongoing support. For instance, one longitudinal study found extended support clients averaged **2 check-ins per month (~67 minutes each)**, mostly routine “maintenance” visits with occasional extra interventions. Notably, federal regulations have historically set **two monthly contacts as the minimum standard** to monitor job stability. This suggests that capping regular meetings at roughly *weekly (4 per month)* is reasonable for most clients, and many can be served with biweekly or monthly check-ins when stable.

By adhering to a “**no more than 4 sessions per month per client**” guideline, a job coach can spread time across more individuals. For example, if each person receives at most one coaching session per week (and often less), a coach can rotate 25+ people through weekly slots without overbooking any single client. The Office for People With Developmental Disabilities (OPWDD) in New York emphasizes that service frequency

should be **dictated by the person's needs** rather than a fixed schedule. Many Extended SEMP (Supported Employment) programs operate indefinitely with, say, **2 check-ins a month as a baseline** for employed individuals, increasing frequency only when issues arise. This prevents over-servicing some clients at the expense of others.

Strategic **spacing of client meetings** is also crucial. Coaches can stagger high-need and low-need contacts so that not all clients require attention in the same week. For instance, a coach might see one cohort of individuals in weeks 1 and 3 of the month and a different cohort in weeks 2 and 4. By alternating schedules, the coach ensures everyone gets support *at least monthly* (or more often if needed) without clustering too many sessions at once. In the IPS model, specialists are expected to make “**multiple contacts... as part of initial engagement**” but then at least **monthly follow-ups** for ongoing support. This aligns with the idea of tapering session frequency over time. In practice, some New York City providers successfully moved to brief but regular touchpoints: during COVID-19, for example, agencies scheduled **twice-weekly 30-minute virtual meetings** per client, enabling a single coach to support **20 clients in ~20 hours/week**. This illustrates how short, well-planned sessions (especially by phone/Zoom) can cover a large caseload. In summary, **limiting session frequency and aligning it with client needs** (weekly or less for stable workers) frees up capacity to take on additional individuals while still ensuring each person gets consistent support.

Replacing Narrative Documentation with Checklists

Reducing paperwork time is another way to increase caseload capacity. Traditional narrative progress notes for each session are time-consuming for job coaches to write and for supervisors to review. Replacing or supplementing these narratives with **structured electronic checklists** can dramatically improve efficiency. In New York State's IDD employment services, the use of standardized checklists is not only encouraged – it's mandated. OPWDD requires that “*for each service session, a provider must document the SEMP services delivered using, at a minimum, the checklist prescribed by OPWDD*”. This means coaches can simply tick off predefined items and record key data (dates, start/stop times, tasks completed, etc.) rather than writing lengthy narratives for every visit. The OPWDD-supported employment audit protocol outlines 9 required elements (individual's name, service type, duration, brief description of activity, etc.) that can be captured in a checklist format. By using an **electronic form or app** that includes all these elements, coaches ensure compliance while minimizing typing.

The benefit of an electronic checklist is twofold: (1) **Speed and consistency** – Coaches spend far less time on documentation after each session. Checking boxes or selecting predefined options (like “provided on-site coaching on task training” or “met with employer for check-in”) is faster than composing paragraphs. (2) **Alignment with standards**– If the checklist is designed around state or national guidelines, it doubles as a quality control tool. For example, OPWDD's prescribed checklist is explicitly

aligned to its service definitions and billing rules, so using it helps ensure no required info is missed (avoiding audit issues). A 2019 OPWDD guidance confirms that **electronic or paper checklists plus a monthly summary** meet documentation requirements for Pathway to Employment and SEMP, as long as all required elements are present. Many agencies have adopted such **tick-box service notes** in their electronic health record systems, dramatically cutting paperwork burdens.

Crucially, moving to checklists does **not** mean sacrificing insight into client progress. Coaches can still add brief comments or rely on a monthly summary note for qualitative details. (OPWDD does require a **monthly narrative summary** per individual to capture overall progress toward goals, but this is just one note instead of a narrative each session.) By **streamlining daily documentation into a checklist format**, a job coach can save a substantial amount of time each week – time that can be redirected to serving more clients. In competitive employment support, administrative duties like documentation often eat into direct service hours. Checklists minimize this drain. In summary, implementing **electronic checklist-based reporting**, aligned with recognized job coaching competencies or state guidelines, lets coaches maintain compliance and quality while significantly **reducing paperwork time per session**. This efficiency directly supports a higher caseload capacity.

Optimizing Travel and Reducing Commute Time

Job coaching in the community often entails significant travel between work sites, schools, and client meetings. Optimizing these logistics can free up hours in a coach's day, allowing them to support additional individuals. **Route optimization and geographic scheduling** are critical. OPWDD's provider training materials explicitly prompt managers to ask: *"How can I create caseloads based on geographical [area], support needs, time of day and other efficiencies?"* In practice, this means assigning or grouping clients so that a coach's visits are concentrated within certain neighborhoods or along efficient transit routes. For example, instead of a coach crisscrossing an entire city in one day, they might spend **Mondays in Brooklyn, Tuesdays in Queens**, etc., if caseload distribution allows. Many NYC supported employment providers organize caseloads by borough or vicinity, which cuts down on transit time and *"windshield time."* By **scheduling back-to-back sessions in the same vicinity**, a coach can see more people per day. Agency supervisors should also consider time-of-day efficiencies – e.g. scheduling some coaching sessions outside of rush hour or aligning them with employer shift changes to avoid downtime. The goal is to **minimize unproductive travel** and maximize face-to-face (or virtual) service hours.

Another powerful strategy is incorporating **remote or virtual support** when appropriate, to reduce on-site visits. The COVID-19 pandemic demonstrated that many job coaching activities (check-ins, problem-solving conversations, benefits counseling, even some on-the-job guidance) can be done effectively via phone or video call. This has a direct impact on caseload capacity: if a portion of meetings are virtual, the coach can

transition between clients in seconds rather than spending 30–60 minutes in transit. As one NYC webinar illustrated, a coach could “set a schedule: **20 clients x 30 min x 2 virtual phone visits/week = 20 hours (3 full days of work)**,” leaving two days for any in-person visits or other duties. In normal operations, even doing **alternate** weeks remotely for clients (e.g. on-site visit one week, quick phone follow-up the next) can halve the travel required. The New York Alliance for Inclusion & Innovation notes that many traditional in-person supports (e.g. meeting with a client’s supervisor, addressing benefit paperwork, counseling families) can be provided remotely on an ongoing basis. By embracing technology and **remote monitoring** tools, coaches cover more ground (literally and figuratively) each month.

Finally, efficient route planning tools can be utilized – even simple use of mapping apps to cluster daily appointments, or more sophisticated scheduling software that optimizes multi-stop routes. Some agencies encourage coaches to treat travel like a billable task to be optimized: for example, planning the **shortest path** that hits multiple work sites in one outing. If two clients work near each other or along the same transit line, those visits can be scheduled sequentially. Agencies have also experimented with **flexible schedules** (e.g. four longer days on the road, with a fifth day for paperwork from home) to give coaches one commute-free day to catch up on admin. All these approaches serve to **cut down inter-site commuting time**. Every hour saved in a week of travel is an hour that can go to another client session. By conscientiously managing caseloads with geography and transit in mind – and leveraging remote supports – programs can increase the number of individuals each coach serves while **maintaining, or even improving, service quality** (since coaches are less likely to be rushed or late due to travel snafus).

Examples and Benchmarks in Practice

Implementing these efficiency measures has allowed some employment support programs to safely raise caseloads. In New York State’s Supported Employment (SEMP) system, it’s not unheard of for an experienced job coach to support **25+ people** once many are in extended, follow-along phases. For instance, a fidelity review in Georgia noted one supervisor temporarily carrying a **caseload of 25** consumers; while this was above the ideal threshold, the program maintained fair outcomes by prioritizing key supports and planned to hire new staff to rebalance. Nationally, surveys of high-performing supported employment providers found that large caseloads were feasible when long-term supports were streamlined – in one multi-state study, several agencies averaged around *30 individuals per specialist* in extended services, thanks to natural supports and efficient monitoring routines. The consensus is that **caseloads in the mid-20s are attainable** if most participants are in stable jobs receiving periodic check-ins rather than intensive daily coaching.

In New York City, providers have piloted the above strategies to serve more people under initiatives like Employment First. Agency managers are advised (via OPWDD

trainings) to **assign staff by region and skill** to reduce duplication. Many NYC SEMP providers also transitioned their documentation to the state's **e-record portal with checklists**, cutting down report writing time. And as noted, during 2020-21 many organizations saw that **virtual supports could augment in-person visits** without quality loss, a practice that continues in hybrid models today. One NYC agency's guidance even calculated that a coach could *theoretically* support **20 individuals with two 30-minute calls each week** and still have two days for in-person visits or new intakes. This kind of model suggests that expanding to ~26 individuals – a 30% increase over 20 – is realistic if some supports are delivered creatively (shorter but more frequent touchpoints, mix of remote and in-person).

It's worth noting that **service quality must remain the focus** even as caseloads grow. Best-practice guidelines emphasize monitoring outcomes (employment retention, employer satisfaction, client progress) to ensure that efficiency gains do not dilute effectiveness. New York's OPWDD and ACCES-VR agencies require annual and semiannual reviews of each person's employment plan, which helps flag if someone is not getting enough attention. Programs should also stratify caseloads by need: for example, a coach might carry a mix of 5 high-need clients (perhaps in their first month of a job) who get weekly visits and 20 low-need clients who only require check-ins once or twice a month. This **tiered support approach** aligns with recommendations to assign staff based on individuals' support hours and to adjust as needs change. By doing so, even with 26+ on the roster, each person still receives appropriate services.

In summary, **increasing a job coach's monthly caseload from ~20 to ~26 is achievable** when supported by deliberate operational changes. By limiting and spacing sessions (e.g. ~4 or fewer per month per individual), using **electronic checklists** to streamline paperwork, and cutting travel inefficiencies through geographic scheduling and remote services agencies can serve more people with the *same* staff resources. Real-world examples from New York and elsewhere demonstrate that with these enabling factors in place, higher caseloads *can* coincide with successful employment outcomes and sustained service quality. The keys are to continually monitor the balance of quantity vs quality, and to refine internal processes so that **job coaches spend more time coaching and less time driving or typing** – ultimately benefiting both the professionals and the individuals with IDD striving for competitive employment.

Sources:

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