

# **Optimizing Staffing and Caseloads for Job Coaching**

## *A Guide for Maintaining Competitive Integrated Employment*

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## Introduction


This guide presents a realistic and actionable framework for optimizing staffing levels and caseloads for job coaches who support individuals with intellectual and developmental disabilities (IDD) in the maintenance phase of competitive integrated employment (CIE). It aims to support program managers, SEMP providers, policy leaders, and job coaches in delivering high-quality services while improving efficiency and financial sustainability.

During the maintenance phase of employment, individuals with IDD typically require fewer, but still consistent, supports to sustain their job success. By implementing structured planning, individualized documentation tools, and time-efficient scheduling practices, SEMP providers can reduce overall staffing needs while increasing staff wages — without additional public funding.

This model is grounded in the AMSI Vocational Rehabilitation Job Coaching (VRJ1) standard and directly aligned with the final stage of the intake process described in AMSI EVI1: Final Eligibility Verification and Inclusive Orientation. In this stage, individualized employment barriers and strategies are identified and recorded as personalized checklist items. These checklists become the core documentation tools used in the maintenance phase and serve as a foundation for both quality assurance and efficient time use.




The recommendations in this guide are structured around two foundational components:

 A justification framework titled *Increasing Job Coach Caseload While Maintaining Quality*, which explains how time use, session scheduling, and documentation methods make it feasible for a job coach to support approximately 26 individuals per month in their caseload, with 4 sessions per person per month.

 A staffing and salary model, presented in *Optimizing Job Coach Staffing and Salaries in Maintaining Competitive Integrated Employment for Individuals with IDD*, which shows that reducing the number of coaches from 19 to 16 can lead to substantial budget savings and salary increases when services are efficiently planned.

Annex A and Annex B provide supplemental materials to support both financial planning and practical implementation, including a budget model and a real-life case scenario.

Together, these two elements offer a blueprint for job coaching that promotes:

-  Higher wages and job satisfaction for staff
-  Consistent, individualized support for people with IDD
-  Reduced reliance on public funds through more efficient service delivery

This guide focuses specifically on the maintenance phase of support. Planning for the intake phase — where job discovery, onboarding, and early-stage job training occur — must account for more intensive time and service needs and is addressed separately through AMSI intake standards.

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## 1. Foundations: Scheduling and Quality in the Maintenance Phase

In the maintenance phase of competitive integrated employment (CIE) for individuals with intellectual and developmental disabilities (IDD), job coaches play a pivotal role in providing consistent support to ensure sustained employment success. Efficient scheduling and quality assurance are essential to balance service effectiveness with operational sustainability.

### 1.1. Caseload Management

An optimized caseload allows job coaches to deliver personalized support without compromising service quality. Based on the model presented, a full-time job coach can effectively manage a caseload of approximately 26 individuals per month. This is structured around providing four sessions per individual monthly, aligning with funding requirements:

- **ACCESS-VR:** Minimum of 2 face-to-face meetings per individual per month.
- **OPWDD:** Minimum of 4 face-to-face meetings per individual per month.

This structure ensures compliance with funding guidelines while maintaining individualized support.

### 1.2. Daily Scheduling Framework

To achieve the targeted caseload, a structured daily schedule is essential. The following framework outlines the daily time allocation for a job coach:

- **Work Schedule:** 8 hours per day.
- **Sessions:** 5 one-hour sessions per day.
- **Documentation:** 5 minutes per session, totaling 25 minutes daily.
- **Travel Time:** Approximately 1.5 hours per day.
- **Monthly Summary Reporting:** 3 hours per month, averaging 9 minutes per day.

This schedule allows for efficient time management, ensuring that job coaches can meet their session requirements while allocating sufficient time for documentation and travel.

### 1.3. Quality Assurance Through Individualized Support

Maintaining high-quality support involves:

- **Individualized Checklists:** Developed during the final stage of the intake process (AMSI EVI1), these checklists identify employment barriers and strategies for each individual. They serve as a guide for job coaches during sessions.
- **Digital Documentation:** Utilizing electronic checklists with features like "Submit" buttons or electronic signatures streamlines documentation, reducing administrative burden.
- **Consistent Monitoring:** Regular reviews of individual progress and checklist updates ensure that support remains tailored and effective.

By integrating these practices, job coaches can provide consistent, high-quality support that adapts to each individual's evolving needs.

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## 2. Key Operational Enablers

To effectively support approximately 26 individuals per month, each receiving four sessions, job coaches must leverage operational strategies that enhance efficiency without compromising service quality. The following enablers are critical to achieving this balance:

### 2.1. Session Planning

Efficient session planning ensures that job coaches can meet the required number of sessions per individual while maintaining flexibility to address unforeseen circumstances.

- **Standardized Scheduling:** Implementing a consistent schedule, such as five one-hour sessions per day, allows for predictable workload management.
- **Buffer Time:** Allocating time for unexpected events or additional support needs ensures that coaches can adapt to varying individual requirements.
- **Use of Scheduling Tools:** Utilizing digital calendars and scheduling software can aid in organizing sessions and sending reminders to both coaches and individuals.

## 2.2. Documentation Efficiency

Streamlined documentation processes reduce administrative burdens, allowing job coaches to focus more on direct support.

- **Digital Checklists:** Employing electronic checklists with features like "Submit" buttons or electronic signatures simplifies data entry and storage.
- **Integration with Intake Process:** Developing individualized checklists during the final stage of the intake process ensures that documentation is tailored to each individual's needs and barriers to employment.
- **Time Allocation:** Limiting documentation to five minutes per session, supplemented by a monthly summary report, balances thorough record-keeping with time efficiency.

## 2.3. Travel and Scheduling Optimization

Minimizing travel time and optimizing schedules enhances the productivity of job coaches.

- **Geographical Clustering:** Assigning individuals based on geographic proximity reduces travel time between sessions.
  - **Virtual Sessions:** Incorporating virtual meetings where appropriate can further decrease travel requirements and increase flexibility.
  - **Route Planning Tools:** Utilizing route optimization software can assist in planning the most efficient travel paths for in-person sessions.
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## 3. Optimizing Staffing and Salaries: Financial Modeling

This section presents a financial model demonstrating how strategic adjustments in staffing and compensation can lead to significant budget savings while maintaining high-quality support for individuals with intellectual and developmental disabilities (IDD) in competitive integrated employment (CIE).

### 3.1. Model Overview

- **Total Individuals Supported:** 394
- **Current Staffing:** 19 job coaches
- **Optimized Staffing:** 16 job coaches
- **Current Caseload per Coach:** 20 individuals
- **Optimized Caseload per Coach:** 26 individuals
- **Sessions per Individual:** 4 sessions per month

- **Session Duration:** 1
- 

## **3.2. Financial Scenarios**

### **3.2.1. Scenario 1: Increasing Hourly Wage from \$18 to \$21**

#### **Current Model:**

- **Hourly Wage:** \$18
- **Monthly Salary per Coach:** \$3,117.60
- **Annual Salary per Coach:** \$37,411.20
- **Total Annual Budget:** \$710,812.80

#### **Optimized Model:**

- **Hourly Wage:** \$21
- **Monthly Salary per Coach:** \$3,637.20
- **Annual Salary per Coach:** \$43,646.40
- **Total Annual Budget:** \$698,342.40

**Annual Budget Savings:** \$12,470.40

*Note:* Despite the increase in hourly wage, the optimized model results in budget savings due to reduced staffing.

### **3.2.2. Scenario 2: Maintaining Hourly Wage at \$21**

#### **Current Model:**

- **Hourly Wage:** \$21
- **Monthly Salary per Coach:** \$3,637.20
- **Annual Salary per Coach:** \$43,646.40
- **Total Annual Budget:** \$829,281.60

#### **Optimized Model:**

- **Hourly Wage:** \$21
- **Monthly Salary per Coach:** \$3,637.20
- **Annual Salary per Coach:** \$43,646.40
- **Total Annual Budget:** \$698,342.40

**Annual Budget Savings:** \$130,939.20



*Note:* By reducing the number of coaches while maintaining the same hourly wage, significant budget savings are achieved.

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### 3.3. Feasibility and Implementation of a 26-Individual Caseload Model

#### 3.3.1. Feasibility of Optimized Caseload

Expanding a job coach's caseload from 20 to approximately 26 individuals per month is achievable without compromising service quality, when supported by operational strategies such as efficient scheduling, digital documentation, and travel optimization. These practices are aligned with evidence-based models like Individual Placement and Support (IPS) and have been successfully implemented by various providers, particularly during and after the COVID-19 pandemic.

Increased caseload capacity is enabled by limiting session frequency per client (e.g., no more than four sessions per month), using standardized electronic checklists instead of narrative notes, and minimizing unproductive travel through geographic clustering and virtual support.

👉 For a detailed explanation with citations, benchmarks, and real-world examples, see the article: **AMSI (2025). *Increasing Job Coach Caseloads Without Sacrificing Quality: A Guide to Efficient Service Delivery in Competitive Integrated Employment***. American Support Standards Institute. [www.amsi-inc.org](http://www.amsi-inc.org)

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#### 3.3.2. Implementation Considerations for the Optimized Model

Transitioning to an optimized staffing model, where each job coach manages a caseload of approximately 26 individuals per month, requires strategic planning and the adoption of efficient practices. The following considerations are essential to ensure a successful implementation:

##### 1. Individualized Digital Checklists

- **Development:** Create personalized checklists during the final stage of the intake process (AMSI EVI1) for each individual, identifying employment barriers and strategies.
- **Integration:** Ensure these checklists are accessible in the back office and linked to each individual's profile, allowing job coaches to tailor support effectively.

- **Utilization:** Use these checklists as the primary tool for session planning and documentation, replacing traditional narrative reports.

## 2. Efficient Scheduling and Session Management

- **Session Allocation:** Plan for five one-hour sessions per day within an eight-hour workday, accommodating the required four sessions per individual monthly.
- **Time Management:** Allocate specific time blocks for documentation (approximately five minutes per session) and travel, ensuring adherence to the daily schedule.
- **Flexibility:** Incorporate buffer times to address unforeseen circumstances or additional support needs.

## 3. Travel Optimization

- **Geographical Planning:** Assign caseloads based on geographic proximity to minimize travel time between sessions.
- **Virtual Sessions:** Implement virtual meetings where appropriate to reduce travel demands and increase flexibility.
- **Route Planning Tools:** Utilize route optimization software to plan the most efficient travel paths for in-person sessions.

## 4. Training and Support

- **Staff Training:** Provide comprehensive training on the use of digital tools, individualized checklists, and efficient scheduling practices.
- **Continuous Support:** Establish a support system for job coaches to address challenges and share best practices.
- **Performance Monitoring:** Regularly review performance metrics to ensure the effectiveness of the optimized model and make necessary adjustments.

## 5. Stakeholder Engagement

- **Communication:** Engage with stakeholders, including individuals with IDD, their families, and funding agencies, to communicate the benefits and operational changes associated with the optimized model.
- **Feedback Mechanisms:** Implement channels for receiving feedback to continuously improve service delivery and address concerns promptly.

By focusing on these implementation considerations, organizations can effectively transition to an optimized staffing model that enhances service quality, increases job coach efficiency, and achieves significant budget savings.

## 4. Integration with AMSI Standards

The optimized staffing and service delivery model for job coaches aligns seamlessly with the AMSI (American Support Standards Institute) framework, ensuring that individuals with intellectual and developmental disabilities (IDD) receive consistent, high-quality support throughout their employment journey.

### 4.1. Alignment with AMSI EVI1: Final Eligibility Verification and Inclusive Orientation

During the final stage of the intake process, as outlined in AMSI EVI1, individualized checklists are developed for each person with IDD. These checklists identify specific barriers to competitive integrated employment and outline strategies to overcome them.

- **Individualized Checklists:** Each checklist is tailored to the individual's unique needs and is created based on the results of the AMSI standard implementation.
- **Back Office Integration:** These checklists are stored in the back office system and are linked to each individual's profile, ensuring that job coaches have immediate access to relevant information.
- **Ongoing Use:** Job coaches utilize these checklists during the maintenance phase to guide support sessions, monitor progress, and make necessary adjustments.

### 4.2. Consistency Across Employment Phases

By integrating the optimized model with AMSI standards, organizations can ensure a smooth transition from the intake phase to the maintenance phase:

- **Seamless Documentation:** The individualized checklists serve as a continuous thread, providing consistency in documentation and support strategies.
- **Enhanced Communication:** Job coaches can communicate more effectively with individuals, families, and other stakeholders by referencing the standardized checklists.
- **Quality Assurance:** The use of AMSI-aligned checklists facilitates regular reviews and quality assurance processes, ensuring that support remains effective and person-centered.

### 4.3. Benefits of Integration

Integrating the optimized staffing model with AMSI standards offers several advantages:

- **Improved Outcomes:** Individuals with IDD receive support that is both personalized and consistent, leading to better employment retention and satisfaction.
  - **Operational Efficiency:** Job coaches can manage larger caseloads without compromising service quality, thanks to the structured approach provided by AMSI.
  - **Data-Driven Decisions:** The standardized checklists enable organizations to collect and analyze data effectively, informing continuous improvement efforts.
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## 5. Implementation Considerations

Transitioning to an optimized job coaching model that supports increased caseloads while maintaining service quality requires a structured approach. This section provides guidance on essential components for successful implementation.

### 5.1. Staff Training and Manager Orientation

Effective implementation begins with comprehensive training for both job coaches and managerial staff:

- **Job Coaches:** Training should encompass efficient scheduling techniques, utilization of digital checklists, and strategies for providing person-centered support. Emphasis on time management and documentation efficiency is crucial.
- **Managers:** Orientation programs should focus on overseeing caseload distribution, monitoring service quality, and supporting staff in adapting to the new model. Managers play a pivotal role in facilitating the transition and addressing challenges.

Utilizing resources such as the *Employment Specialist Onboard Checklist* can aid in structuring training programs effectively.

### 5.2. Development of Digital Forms and Checklist Infrastructure

Implementing digital tools is essential for streamlining documentation and enhancing service delivery:

- **Digital Checklists:** Develop electronic checklists aligned with AMSI standards to replace traditional narrative documentation. These checklists should capture essential service elements, facilitate quick data entry, and ensure compliance with regulatory requirements.

- **Integration with Existing Systems:** Ensure that digital tools are compatible with current electronic health record systems to maintain continuity and data integrity.
- **Training on Digital Tools:** Provide staff with training on using digital platforms effectively, emphasizing data security and confidentiality protocols.

### 5.3. Internal Monitoring for Workload Balance

Maintaining balanced workloads is critical to prevent staff burnout and ensure consistent service quality:

- **Caseload Analysis:** Regularly assess caseload distribution among job coaches to identify disparities and redistribute assignments as needed.
- **Feedback Mechanisms:** Establish channels for staff to provide feedback on workload challenges, enabling proactive adjustments.
- **Performance Metrics:** Monitor key performance indicators such as session frequency, client progress, and documentation timeliness to evaluate effectiveness.

Refer to the *Supported Employment Fidelity Review Manual* for guidance on maintaining high-fidelity supported employment practices.

### 5.4. Alignment with OPWDD and ACCES-VR Reimbursement Models

Ensuring financial sustainability involves aligning services with reimbursement structures:

- **Understanding Reimbursement Criteria:** Familiarize staff with the documentation and service delivery requirements stipulated by OPWDD and ACCES-VR to secure appropriate funding.
- **Billing Practices:** Implement billing procedures that reflect the optimized service model, ensuring that all reimbursable activities are accurately captured and reported.
- **Continuous Compliance:** Stay updated on changes in reimbursement policies and adjust practices accordingly to maintain compliance and financial viability.

Consult the *OPWDD Employment Services New Provider Training Manual* for detailed information on service requirements and reimbursement guidelines.

## 6. Broader Impact and Policy Implications

The adoption of an optimized job coaching model, characterized by increased caseloads, streamlined documentation, and integration with AMSI standards, has far-reaching implications across various stakeholders and policy domains.

### 6.1. Benefits to Individuals with IDD

Implementing this model enhances the quality and consistency of support for individuals with intellectual and developmental disabilities (IDD):

- **Personalized Support:** The use of individualized checklists ensures that support strategies are tailored to each person's unique needs, promoting better employment retention and satisfaction.
- **Increased Access:** By enabling job coaches to manage larger caseloads effectively, more individuals with IDD can access the support they need to secure and maintain competitive employment.
- **Empowerment:** Consistent and person-centered support fosters greater independence and self-confidence among individuals with IDD, contributing to improved quality of life.

### 6.2. Advantages for Job Coaches

Job coaches benefit from the optimized model through improved workflows and professional development opportunities:

- **Efficiency:** Streamlined documentation processes reduce administrative burdens, allowing coaches to dedicate more time to direct support activities.
- **Professional Growth:** Training on AMSI standards and digital tools enhances coaches' skills and competencies, contributing to career advancement.
- **Job Satisfaction:** Efficient caseload management and the ability to make a meaningful impact on more individuals' lives can lead to increased job satisfaction and reduced burnout.

### 6.3. Organizational Impact

Organizations implementing the optimized model can experience significant operational and financial benefits:

- **Cost Savings:** Efficient staffing models and reduced administrative overhead can lead to substantial cost savings, which can be reinvested into program development and staff compensation.

- **Enhanced Service Delivery:** Standardized procedures and tools ensure consistent service quality across the organization, improving overall program effectiveness.
- **Scalability:** The model's efficiency enables organizations to expand their services to a broader population without proportionally increasing resources.

## 6.4. Public Policy Considerations

The broader adoption of this optimized model aligns with public policy goals and can inform future legislative and funding decisions:

- **Alignment with Employment Initiatives:** The model supports national and state-level initiatives aimed at increasing employment opportunities for individuals with disabilities.
- **Data-Driven Policy Making:** The standardized data collected through AMSI-aligned checklists can inform policymakers about program outcomes and areas for improvement.
- **Funding Efficiency:** Demonstrated cost-effectiveness and improved outcomes can justify continued or increased funding for supported employment programs.

## 6.5. Recommendations for SEMP Provider Adoption

To maximize the benefits of the optimized model, Supported Employment (SEMP) providers are encouraged to:

- **Invest in Training:** Provide comprehensive training for staff on AMSI standards, digital tools, and efficient caseload management strategies.
- **Implement Digital Infrastructure:** Adopt or develop digital platforms that facilitate streamlined documentation and data analysis.
- **Engage Stakeholders:** Collaborate with individuals with IDD, families, employers, and policymakers to ensure the model meets diverse needs and garners broad support.
- **Monitor and Evaluate:** Continuously assess program outcomes and processes to identify areas for improvement and demonstrate effectiveness.

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## Annex A: Presentation Slide Deck – Financial Modeling Summary (Visual Supplement to Section 4)

**Title:**

**Optimizing Job Coach Staffing and Salaries in Maintaining Competitive Integrated Employment for Individuals with IDD**

**Prepared by:** American Support Standards Institute (AMSI)  
**Year:** 2025

This slide deck outlines the financial implications and operational feasibility of increasing job coach caseloads from ~20 to ~26 individuals per month during the **maintenance phase** of competitive integrated employment for individuals with intellectual and developmental disabilities (IDD).

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## Slide 1: Title Slide

### Optimizing Job Coach Staffing and Salaries in Maintaining Competitive Integrated Employment for Individuals with IDD


American Support Standards Institute (AMSI) – 2025

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## Slide 2: Introduction


This model is based on the AMSI VRJ1 Guide for Job Coaches and assumes a stabilized employment phase where:

- Each individual receives 4 sessions per month
- Each session lasts 1 hour
- Work month includes 21 working days

 *Note: During the intake phase (job search, onboarding, initial training), more time per client is required and should be planned accordingly.*


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## Slide 3: Financial Case 1 – Raise Hourly Rate from \$18 to \$21

- **Caseload:** 394 individuals
  - **Current Model:** 19 coaches at \$18/hour → ~20 clients/coach
    - Monthly: \$3,117.60 | Annual: \$37,411.20
    - Budget: \$710,812.80
  - **Optimized Model:** 16 coaches at \$21/hour → ~26 clients/coach
    - Monthly: \$3,637.20 | Annual: \$43,646.40
    - Budget: \$698,342.40
  -  **Savings:** \$12,470.40 while increasing pay per coach
-



## Slide 4: Financial Case 2 – Same Rate, Fewer Coaches

- **Same Caseload & Pay Rate:** \$21/hour
  - **Current Model:** 19 coaches → Budget: \$829,281.60
  - **Optimized Model:** 16 coaches → Budget: \$698,342.40
  -  **Savings:** \$130,939.20 with same pay rate
- 

## Slide 5: Preliminary Service Conditions



- **Daily Work Schedule:** 8 hours/day × 21 days/month
  - **Session Capacity:** 5 sessions/day (1 hour each)
  - **Monthly Capacity:** 105 sessions → ~26 individuals/month (4 sessions each)
  - **Documentation:**
    - 5 minutes/session with individualized digital checklists
    - Monthly summary: 3 hours per caseload
  - **Travel:** 1.5 hours/day for commuting
  - **Tools:** Checklists aligned with AMSI EVI1 standard, created at final intake stage
- 

## Slide 6: Key Takeaways

- Model applies to stabilized employment (maintenance phase)
  - Achievable only with:
    - Digital checklists with "Submit" or e-signature options
    - Integration of AMSI EVI1 standard
  - Caseload per coach rises to ~26
  - Coach salaries increase without raising total budget
  - Budget savings: Up to \$130,939.20/year
- 

## Slide 7: Conclusion

- Sustainable model for rising wages and efficient staffing
- Case 1: *Savings even with increased wages*
- Case 2: *Greater savings from reduced staff count*
- Enabled by:
  - 4 sessions/month per client
  - 5 daily sessions per coach
  - Elimination of narrative documentation
  - Travel time reduction

-  *Impact:* Direct public funding savings (Medicaid), scalable citywide, statewide, and nationally
  -  *Outcome:* Higher wages, efficient staffing, reduced expenditures
- 

## Annex B: Case Scenario – Utilizing a Digital Individualized Checklist

### Client Profile:

- **Name:** Jordan
- **Age:** 27
- **Diagnosis:** Mild Intellectual Disability
- **Employment:** Part-time retail associate at a local bookstore
- **Support Phase:** Maintenance
- **Job Coach:** Taylor

### Background:

Jordan has been employed at the bookstore for six months. Initial intensive supports have tapered, and Jordan now requires periodic check-ins to ensure continued success.

### Individualized Checklist Development:

Based on assessments during the intake and stabilization phases, the following key support areas were identified:

1. **Punctuality:** Arriving on time for scheduled shifts.
2. **Task Management:** Completing assigned duties efficiently.
3. **Customer Interaction:** Engaging positively with customers.
4. **Stress Management:** Utilizing coping strategies during busy periods.
5. **Communication:** Reporting any issues to the supervisor promptly.

These areas were incorporated into a digital checklist accessible via a mobile application, allowing both Jordan and Taylor to monitor progress.

### Monthly Support Cycle:

- **Week 1:**
  - **Check-In:** Taylor conducts an in-person meeting with Jordan at the workplace.

- **Checklist Review:** Together, they go through the checklist, noting successes and areas needing attention.
- **Observation:** Taylor observes Jordan during a shift, focusing on customer interactions.
- **Feedback:** Positive reinforcement is provided, and strategies for improvement are discussed.
- **Week 2:**
  - **Virtual Meeting:** A scheduled video call to discuss the past week's experiences.
  - **Checklist Update:** Jordan reports on each checklist item, with Taylor providing guidance as needed.
- **Week 3:**
  - **Supervisor Input:** Taylor contacts Jordan's supervisor to gather feedback on performance.
  - **Checklist Adjustment:** Based on feedback, the checklist is updated to reflect new goals or areas of focus.
- **Week 4:**
  - **Final Review:** An in-person meeting to assess the month's progress.
  - **Documentation:** Taylor finalizes the monthly report, summarizing achievements and setting objectives for the next month.

## Outcomes:

- **Increased Independence:** Jordan demonstrates improved self-monitoring and problem-solving skills.
- **Enhanced Communication:** Regular updates via the digital checklist facilitate timely support.
- **Efficiency:** Taylor manages a caseload of 26 individuals effectively, utilizing digital tools to streamline documentation and communication.

## Conclusion:

The integration of a digital individualized checklist in the maintenance phase of support enables targeted, efficient, and person-centered services. This approach not only supports the individual's continued employment success but also allows job coaches to manage larger caseloads without compromising quality.

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