

Learning, Leading, Changing

Casework Teaming to Reduce Workload, Enhance Effectiveness & Boost Morale (Webinar, January 2013)

What is this resource?

- Designed to reduce worker isolation and workload; improve workforce retention; strengthen casework decision-making and service delivery to children, youth and families (CPS, Foster Care, and Preventive Services).
- More than one worker is assigned to a case, with shared responsibility and understanding of families.
- Use group supervision and teamwork to promote best thinking on how to serve a family, support each other, get all the work done and share responsibility for the results.
- Team and supervisor meet weekly for group supervision to discuss families, systems issues or barriers to service provision and develop strategies and techniques to help families and one another.
- Case criteria for teaming: high risk of removal, recent removal and/or multiple issues (e.g. domestic violence, mental illness, substance abuse) or if staff feel it would be beneficial due to caseload size/workload management.
- Decisions made by consensus with supervisory oversight (approval/agreement).
- Operating agreement is established to address roles, responsibilities, expectations and conflict resolution.
- Team members decide on roles (e.g., primary or secondary worker, note-taker, time-keeper, facilitator, observer).
- Team decides how many/what type of cases to team, and when to increase teamed cases or to de-team a case.
- Project coordinator/trainer/coach provides on-site training and coaching on team formation and implementation.
- Monthly calls for county/state administrative staff/trainers regarding successes, challenges, support and solutions.

What are the critical findings?

- Families always have staff available who knows them and will use knowledge/experience to benefit their family.
- Worker stress/workload reduced by shared responsibility and decision-making; morale increased due to positive feedback/support, workload management and ability to take time off without worrying about crises while away.
- Annual symposium provides opportunity for county teams, state staff and other stakeholders to learn and share ideas in a collaborative learning environment.
- Team development requires monthly exposure to activities that support: group decision-making, use of time, problem-solving, team-building, conflict resolution, productive communication skills, leadership.
- Teaming supervisors are less focused on workload/task completion. Casework staff have more autonomy, higher acceptance of alternative perspectives and are more likely to ask for help. Teaming accelerates the learning curve and engagement of new workers. Team-based approach doubles collective efficacy and divides individual exposure.

What are the implications for our work?

- Group decision-making and team-building increase morale, relieve stress and help unit members bond.
- Teaming humanizes supervisors and makes it easier for workers to challenge recommendations in healthy, productive ways.
- Need a high level of team commitment to get through the “storming” phase of team development.
- Requires change in habits, change in relationships, and change in roles. Can be difficult to make initial investment of time in learning and development while simultaneously managing workload.
- Workspaces often not conducive to teams; need space for group supervision and team to sit contiguously.
- Frequent reorganizations and staff transfers are disruptive to team formation and cohesion.
- Ongoing feedback helps with model development and support for adaptations.
- Need commitment, buy-in and ongoing communication process for staff and stakeholders at all levels.
- Must provide ongoing coaching of new and existing teams and allow for model flexibility based on type of team.

