

## Workload Management

### Caseworker Readiness Activity

Until new caseworkers actually begin their job duties, it is impossible for them to fully appreciate the complexity of managing a caseload. During their first few months especially, caseworkers will find it challenging as they:

- Learn how to handle competing priorities
- Respond to client emergencies
- Realize the quantity of tasks involved in ensuring the safety, well-being and permanence of children

For example, the nature of child protection is such that no caseworker can be in total control of their workday. Case crises, making required contacts on new cases, etc., are inevitable, and may take precedence over anything else the caseworker has planned. This may cause frustration and stress for the caseworker.

Caseworkers will be most effective in managing their caseload if they commit themselves from the first day on the job to be as organized and deliberate in their planning as possible. For instance, the caseworker should:

- Keep track of time frames for required case activities
- Carefully plan and try to avoid last minute efforts to complete case requirements
- Notify clients, particularly those without a phone, that an emergency may prevent the caseworker from making a scheduled appointment
- Stay current with case documentation

#### **Activity:**

Talk with the supervisor about having another caseworker as a mentor. The mentor can share strategies for managing caseloads successfully.

It is imperative that the caseworker be able to effectively manage his or her caseload. The safety and well-being of children and families is dependent on the ability to do so.

There may be times when one's workload seems especially demanding. As a result, the caseworker may find him or herself:

- Missing important deadlines
- Hurrying to complete tasks
- Making an increased number of errors

- Misplacing paperwork
- Having difficulty maintaining their focus

The caseworker should seek assistance from the unit supervisor as soon as any of these and/or other workload management issues occur. The supervisor may be able to help the caseworker identify factors that are problematic, and assist in their resolution.

The agency is likely to have guidelines available to assist caseworkers in organizing their work space, paperwork and necessary information. The guidelines may be specific to a particular unit and/or the job responsibilities of the caseworkers.

General guidelines may include:

- Using a bulletin board to post schedules and other information frequently referred to by the caseworker
- Keeping a clear work space for writing
- Storing frequently used files in certain file drawers; lesser used materials in a separate file drawers
- Having an adequate number of supplies on hand (working pens and pencils, paper, stapler and staples, paper clips, etc.)
- Utilizing special organization tools for papers (stacks, etc.)
- Keeping frequently used items such as forms, phone book, etc., easily accessible
- Taking care to avoid spills or other damage caused by having food or beverages at the desk

Caseworkers might also find the following suggestions helpful in their efforts to manage their time most efficiently:

- Utilizing computer ticklers to remind them of a task to be done and / or an approaching deadline
- Keeping a personal daily, monthly and/or yearly calendar to note appointments, meetings, project due dates, case timeframes, etc.
- Writing down all important information to eliminate the need to remember everything
- Every day, committing to the completion of one or two important tasks on the “to do list”

**Activity:**

Talk with the unit supervisor about other organizational guidelines, particularly those that are specific to the program area.

Talk with three experienced caseworkers and collect their best advice or tips regarding how to manage the workload. Record these here and review with your supervisor.

Workload management tips from veteran caseworkers:

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