

## Adult DET Contract Policy 2 – Individual Service Strategy

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Attached to this policy are the instructions and standard Individual Service Strategies (ISS) formats that will be used for all Adult Blue Collar enrollments. This will replace all current ISS documents used by contractors. The new ISS may reference sections of a previously completed strategy as long as all are available in the contractors participant file. Contractors may add additional items to this document but the items contained here are the minimum elements to be included and must be completed. ISS's will be jointly developed by the participant and contractor. **All participants must have a complete up to date ISS within two weeks of enrollment (see definition of completeness on last page of each attached ISS format).**

**Initial ISS will be kept in participant files. Updates to ISS should be notated through the use of notes in DJL. All notes should be entered on the Program Detail Screen under Program Notes and the “Description” should be titled ISS Update.**

Contractors will keep the original signed copy in participant file. Updates will be maintained electronically in DJL and do not require a signed form as long as the program notes describe the process of the update.

Contractors that wish to maintain ISS's in a different format may do so only after they have submitted a written request to and have received approval from their Contract Specialist. The request must contain the proposed format. The requested format when approved will be incorporated as an attachment into the contract.

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## Adult - Individual Service Strategy (ISS) Plan Completion Instructions

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### **Purpose**

The Individual Service Strategy (ISS) form is used for two purposes:

1. to work with adults to mutually identify and set educational and employment goals
2. to identify service objectives and a service plan of action needed to achieve the identified goals

The process of mutually developing, implementing, and revising an ISS should be viewed as an important part of the adult development process. By using the planned vs. achieved aspects of the ISS process in a continuous manner, the case manager and adult have a framework to identify, monitor, and adjust the work that is being accomplished and a means of enabling the adult to take responsibility for and actively participate in the accomplishment of goals and objectives. This mutual planning process enables the adult to develop individual ownership of the plan and learn, through the process, that they can make choices and that their actions can lead directly to specific outcomes. Valuable skills in goal setting and planning can also be developed.

### **General Directions**

Through mutual planning with the adult and use of the information obtained during the assessment process, complete the ISS within two weeks of completing the enrollment process. A brief summary of enrollment process must be notated within Delaware Job Link (DJL) under program notes within the program details screen. The description should include information relating to the proper steps associated with determining eligibility and appropriateness for the training program. Review the plan with the adult each month or during the case manager evaluation process and revise as needed.

### **Directions for Specific Sections**

#### **Signatures**

Both parties are required to sign and date the ISS. By signing this plan, both parties agree that this ISS was a jointly developed plan to achieve educational and employment goals as established. This plan should be signed at the completion and a copy provided to the adult.

#### **Assessment**

##### **Education**

Please check the appropriate box indicating the education status at the time of development of the ISS.

##### **Assessment Tools Administered**

Indicate what assessment tool(s) was used in order to establish the goals within the ISS. All assessment results must be located within the adult participant file for future reference. Review and discuss all assessment results including any identified barriers to goal achievement that need to be addressed for the adult to succeed. For example, issues that need to be addressed for the adult to succeed and achieve goals that have been set could include, lack of work experience, childcare, substance abuse, homelessness, disability, limited English, pregnant or parenting, or poor health etc.

##### **Activities/Interests**

Interests and activities can assist with developing and illustrating many of the skills that employers seek. They can also expand your self-knowledge and your experience. Interests and activities can be defined as anything that has been done outside the limitations of paid work. Obvious examples include: sports, leisure activities, hobbies, but they can also include voluntary work, care or other work within the family, political activity, membership of clubs and societies, etc.

### **Work Experience Information**

Provide at least 1 year of work and/or volunteer experience.

### **Career Goal - Pathway**

Based on the career assessment, the adult will be able to indicate a career goal such as teacher, computer technician, mechanic, nurse, lawyer, police officer, etc., and that information can be entered as stated. In addition to the career goal, enter a career path related to the position. For example, an adult may state an interest in becoming a nurse. Instead of asking the adult to decide exactly what they mean immediately (i.e., RN, LPN, nurse's aide, radiology technician, etc.), list a career path for a medical profession or health care field and note that a more definitive identification will be determined at a later time. If an adult cannot identify an area of interest, review the assessment data in the area of interests; enter "unknown at this time." Then list skills in the area of career planning and decision-making, labor market knowledge, and/or occupational knowledge as work readiness goals. If unknown at this time a monthly review should be scheduled to discuss career goal/pathway until determined.

### **Supportive Service Needs and Solutions**

Any existing or potential barriers should be identified during the assessment and interview process. These barriers must be identified. Once identified it is the responsibility of the case manager to provide a solution to the supportive service need. A solution can be offered through services made available through the provider or through a referral, linkage or partnership. For example, if transportation to and from the training program is identified as a barrier the program provider may offer bus passes to alleviate this barrier (*if funds are available to offer this service*).

## **Goals, Action Plan/Activities, and Achievements**

### **Long-term Goals**

There are two types of long-term goals: education and employment. Long-term in this case is defined as one year. Both goal sections are needed. The education goal section may be used in two ways: 1) to establish educational goals that are needed for self-sufficiency and increased earnings over time; and 2) to identify any educational needs the adult may have relative to the career goal(s) and employment goal(s) selected. The employment goal may be in terms of a specific job or a particular field. For younger adults, the employment goal may be listed as a specific career exploration area.

### **Short- Term Goals**

For each long-term goal, there should be a series of short-term goals sequenced to lead to achievement of the long-term goal. These short-term goals should be achievable in "manageable bites," enabling the adult to experience regular successful achievements. The short term goals are the interim measurable milestones that can be used to determine if actual progress is being made. When determining the sequence of the goals, the case manager and the adult usually consider first goals which meet any primary needs such as food, clothing, health, and shelter. Then prerequisite goals — goals that need to be achieved before other goals can be reached — can be identified and set.

### **Credentials**

In this section you will document the plan for obtainment. These credentials should align with the assessment results and overall goals established within the ISS. The value of credentials to employers, workers, and society should not be overlooked. For employers, credentials demonstrate and document skills. For job seekers, credentials improve their labor market experience through higher earnings, greater mobility and enhanced job security. While a bachelor's or associate's degree is linked to higher earnings, so are occupational certificates that can be earned in less than two years. The opportunity to earn credentials in less than two years is very attractive for adults and young adults alike. Industry-recognized credentials that can be earned in as little as six months to two years provide an alternative to more lengthy and costly undergraduate degrees.

### **Activities**

For each short-term goal, one or more activities or services that will be provided to help the adult achieve the goals should be entered along with the expected start and planned completion date. If an activity identified is being provided through a linkage or partner service then the name of the organization providing the service, and contact information should be documented within the participant file for the purpose of obtaining services and receiving progress updates during the course of the delivery of these services.

### **Task and Responsibilities towards achieving the goals**

List the action steps to be taken to achieve the short-term goals and identify who will do what and when. Program notes can record these individually tailored steps. Some examples are as follows:

- Case manager will discuss job placement with the job developer by 11/15/14.
- Participant will obtain bus pass by 11/15/14 and be on time for scheduled classes.
- Participant will purchase alarm clock by 11/15/14.

### **Plan for Contact During Participation**

Through mutual planning, identify times and places for future meetings (e.g., every Tuesday at 4:00 PM or the first Monday of each month at 6:00 PM). Make the schedule easy to remember. Include the participation schedule and scheduled one on one evaluations to discuss progress relevant to the ISS, attendance, and competency achievements during participation. Complete the scheduled dates of contact and include a description of the planned level of contact.

### **Modification to Plan**

Complete this section if a modification to the ISS plan is warranted based on current progress or changes as determined through the evaluation process. Identify the goal or activity being revised and obtain the appropriate initials. Modification to Plan should be completed by entering program notes in DJL.

### **Updates and Progress Notes – Documented in Delaware Job Link (DJL)**

Updates regarding progress towards achieving the short-term goals (i.e., attendance, grades, instructor's or employer's comments) must be documented. This can be entered as program notes. Minor revisions, such as change in schedule or activities, should also be entered in this section.

Reference General Policy 8 Program Notes.

### **Post Participation Plan (Follow Up Services)**

Before the adult exits the program, the case manager should determine, with the adult, what will be needed to ensure success after program participation ends. For example: Employers may want assistance with coaching adult on continuing improvement in employability skills.

The case manager (or follow-up specialist) must maintain frequent, systematic contact and interaction with each participant after completion of program services.

Job loss frequently occurs rapidly (the first day, first week, or first month of employment). Thus, case managers need to provide intensive support during the first part of the follow-up period and should be described within the plan of contact portion of the follow up services plan.

## INDIVIDUAL SERVICE STRATEGY

Today's Date: \_\_\_\_\_ Name: \_\_\_\_\_

Enrollment Date \_\_\_\_\_

SIGNATURES (at ISS Development)		
<i>Both parties agree that this ISS is a jointly developed plan to achieve educational, employment and leadership goals.</i>		
Print Name	Signature	Date
Participant		
Staff Person		

Assessment			
Education			
Received High School Diploma? <input type="checkbox"/> Yes <input type="checkbox"/> No		If No, what is the highest grade you completed?	
GED® <input type="checkbox"/> Yes <input type="checkbox"/> No			
Assessment Tools Administered			
Check all that apply	Assessment Tool Options	Check all that apply	Assessment Tool Options
	Obstacles to Achieving Your Goals (To determine supportive service needs)		TABE:
	Provider Application		CASAS
	Assessment Interview Form		Activity/Interest:
	Values Survey (Career Assessment)		Activity/Interest:
	<a href="http://www.mynextmove.org">www.mynextmove.org</a>		Other:
	Delaware Career Compass		
Activities/Interests			
Work Experience			
Career Goal - Pathway			
Overall Career Goal:		Career Pathway:	
Supportive Service Needs & Solutions			
(Indicate Services Provided and/or Partnerships Established for assistance)			
Identified Barriers	Supportive Service Need and referral/linkage		

<b>EDUCATIONAL GOALS</b>	
LONG TERM EDUCATIONAL GOAL: <i>(Achievable within approximately one year or within the duration of the program)</i>	
SHORT TERM EDUCATIONAL GOAL(s): <i>(Should be relevant to long term goal)</i>	
1. _____	
2. _____	
3. _____	

<b>CREDENTIAL(s):</b> (Include a Plan for Credentials that align with the jobs in demand, student's career plan and/or overall educational goals.)			
	<i>Expected Start Date</i>	<i>Planned Completion Date</i>	<i>Achieved</i>
Diploma / G.E.D.®			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No

<i>Activities should lead to the achievement of educational goal(s)</i>	<i>Expected Start Date</i>	<i>Planned Completion Date</i>	<i>Achieved</i>
Activity 1:			<input type="checkbox"/> Yes <input type="checkbox"/> No

Activity 2:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 3:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 4:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 5:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 6:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 7:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 8:			<input type="checkbox"/> Yes <input type="checkbox"/> No

<b>EMPLOYMENT GOALS</b>
<p>LONG TERM EMPLOYMENT GOAL: <i>(Achievable within approximately one year or within the duration of the program)</i></p> <hr/> <p>SHORT TERM EMPLOYMENT GOAL(s): <i>(Should be relevant to long term goal)</i></p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>

<b><i>CREENTIAL(s):</i></b> (Include a Plan for Credentials that align with the jobs in demand, student’s career plan and/or overall educational goals.)			
	<b><i>Expected Start Date</i></b>	<b><i>Planned Completion</i></b>	<b><i>Achieved</i></b>

		<i>Date</i>	
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Other - Specify:			<input type="checkbox"/> Yes <input type="checkbox"/> No

<i>Activities should lead to the achievement of employment goal(s)</i>	<i>Expected Start Date</i>	<i>Planned Completion Date</i>	<i>Achieved</i>
Activity 1:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 2:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 3:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 4:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 5:			<input type="checkbox"/> Yes <input type="checkbox"/> No
Activity 6:			<input type="checkbox"/> Yes <input type="checkbox"/> No

**Task and Responsibilities towards achieving all goals (Specify who will do what and when)**

<b>Participant will:</b>
<b>Case Manager will:</b>
<b>Comments:</b>

<b>PLAN FOR CONTACT DURING PARTICIPATION</b>	
<i>(Include participation schedule and scheduled one on one evaluations to discuss progress relevant to the ISS, attendance, and competency achievements during participation)</i>	
<i>Indicate dates of scheduled contact</i>	<i>Description of the Planned Level of Contact</i>


<b><i>MODIFICATION OF PLAN (Identify the goal or activity being revised)</i></b>	<b><i>Staff Initials &amp; Date</i></b>	<b><i>Student Initials &amp; Date</i></b>

Name: \_\_\_\_\_

<b>POST PARTICIPATION PLAN – (Describe the plan for Follow-up services; include activities, types &amp; frequency of services and long term goals previously established).</b>		
<i>Service Start Date:</i> _____		<i>Service End</i>
<i>Date:</i> _____		
<i>Activities</i>	<i>Staff Initials &amp; Date</i>	<i>Student Initials &amp; Date</i>

<b>POST PARTICIPATION PLAN OF CONTACT DURING 6 MONTH FOLLOW UP</b>