CWP Policy and Procedure Manual

Program: WIOA Youth	**Section:** 5-40
Subject: Individual Service Strategy	**Effective Date:** 7/1/16

A. Purpose

The Individual Service Strategy (ISS) is an action plan that guides a participant's progress towards a chosen career pathway through goals, objectives and services linked to program participation and performance. This policy details the requirements for the creation and tracking of those plans for individual participants.

B. Applicable Programs

This policy applies to all programs serving opportunity youth participants. Programs serving other participants may choose to adopt this policy.

1. WIOA Requirements

Per WIOA Sec. 129 (c)(1), programs must provide an **objective assessment** of and develop **service strategies** for each participant. The objective assessment must cover a participant's academic levels, skill levels and service needs. It must also review a participant's basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs and developmental needs. The purpose of the objective assessment is to identify appropriate services and career pathways for the participant, and therefore inform the participant's service strategies. The participant's service strategies must link to performance indicators and include an identified career pathway with education and employment goals, objectives and appropriate services.

2. WIOA Performance Indicators

WIOA youth programs have six performance indicators.
a. The percentage of program participants who are in education or training activities, or in unsubsidized employment, during the second quarter after exit from the program
b. The percentage of program participants who are in education or training activities, or in unsubsidized employment, during the fourth quarter after exit from the program
c. The median earnings of program participants who are in unsubsidized employment during the second quarter after exit from the program
d. The percentage of program participants who obtain a recognized postsecondary credential, or a secondary school diploma or its recognized equivalent, during participation in or within 1 year after exit from the program
e. The percentage of program participants who, during a program year, are in an education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains toward such a credential or employment
f. The indicators of effectiveness in serving employers

C. ISS Creation

Creation of the ISS is the participant's first program activity. An ISS combines participant information from multiple sources and creates a comprehensive action plan for that participant to follow as s/he begins to receive program services. In addition to the objective assessment and service strategies components required under WIOA, CWP requires a life domain component. These components are captured with a combination of ETO TouchPoints. A program may choose to collect supplemental components, but it may not supplant or contradict this policy.

Program: WIOA Youth	**Section:** 5-40 page 2
Subject: Individual Service Strategy	**Effective Date:** 7/1/16

1. **Program Eligibility**
   Prior to creating a formal ISS for a participant, the participant must be determined eligible to receive services under the applicable funding.

2. **Objective Assessment Process**
   CWP does not have a prescribed objective assessment process. While some assessments are mandatory across programs, others are selected by the provider. Assessments must be approved by CWP prior to use with participants. The objective assessment elements are aggregated in ETO with the Program Suitability Review TouchPoint. The (OY) Individual Service Strategy by Participant Report creates an exportable and printable version that can be uploaded to the participant's CTHires account and added to the participant's hardcopy file. See **Appendix A** for more details on the objective assessment elements and data sources.

3. **Life Domain Profile**
   This tool provides a snapshot of a participant's circumstances across multiple life domains. Generally the information is collected during the intake process, concurrently with program eligibility determination, and at regular intervals throughout program enrollment. The Life Domain Profile is designed to capture changes across a variety of quality of life and self-sufficiency indicators, and is tracked in ETO using the Life Domain Profile TouchPoint.

4. **Supportive Service Referrals**
   If a provider determines that a youth requires a supportive service, the provider is to refer that youth to an appropriate organization. The actual referral must be recorded in ETO with the Supportive Services Referral TouchPoint and the status of that referral must be tracked with the Supportive Services Referral Follow-up TouchPoint.

5. **Career Pathways Mismatch**
   Providers should help youth identify an appropriate career pathway as part of the eligibility, fit and suitability process. If a youth chooses a career pathway that is not supported by the provider's available program tracks or services, the provider is to refer the youth to other, more appropriate programs. The referral must be recorded in ETO with the (OY1) Recruitment Activities and Notes TouchPoint.

6. **Goal Setting**
   A participant must have one goal set for each performance indicator. Each goal should have three (3) objectives. Goals are organized and tracked in ETO with the Goal Tracker TouchPoint. See **Appendix B** for sample goals.

D. **ISS Review**
   The ISS must be formally reviewed <u>with the participant</u> no less than quarterly. Informal ISS reviews may occur monthly, at the discretion of provider staff. As objectives are met and goals are accomplished, new goals should be set. Planned services should evolve with the changes in goals and objectives.

E. **Data Entry**
   The initial ISS and all subsequent ISS reviews are to be entered into ETO and CTHires within two (2) business days of completion. A program may enter data sooner if preferred.

Program: WIOA Youth	**Section:** 5-40 page 3
Subject: Individual Service Strategy	**Effective Date:** 7/1/16

1. **ETO Functions**

   ISS data requires the following ETO functions:
   a. Dashboards
   b. TouchPoints
   c. Entity Enrollment

   See program-specific processes and related ETO procedures for details.

2. **ETO Results Reports**

   The (OY) Individual Service Strategy by Participant Report is the main report available to program staff, although additional program-specific reports can be built upon request.

3. **CTHires Functions**

   The initial ISS and all subsequent formal updates are to be uploaded to the participant's Document (Staff) section in CTHires within two (2) business days of completion. A corresponding activity and case note must also be recorded in CTHires. See program-specific processes and related CTHires procedures for details.

F. **Verification**

   Verification requirements are based on the program. The actual act of verification is recorded according to the program's guidelines (ex: (OY2) Pathways Activities and Notes TouchPoint)

Appendix A: Objective Assessment Elements

WIOA Definition

Per WIOA Sec. 129 (c)(1), programs must provide an **objective assessment** of each participant. The objective assessment must cover a participant's academic levels, skill levels and service needs. It must also review a participant's basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs and developmental needs. The purpose of the objective assessment is to identify appropriate services and career pathways for the participant, and therefore inform the participant's services strategies.

CWP Process

CWP does not have a prescribed objective assessment process. While some assessments are mandatory across programs, others are selected by the provider. Assessments must be approved by CWP prior to use with participants. The objective assessment elements are aggregated in ETO with the Program Suitability Review TouchPoint. The (OY) Individual Service Strategy by Participant Report creates an exportable and printable version that can be uploaded to the participant's CTHires account and added to the participant's hardcopy file. The table below lists additional information on the tools and ETO data sources used by CWP and its providers.

WIOA Element	Definition	Tools and ETO Data Sources
Basic Skills	The level at which an individual computes or solves problems, reads, writes or speaks English	Tool • CASAS Test ETO • CASAS Score TouchPoint • Program Suitability Review TouchPoint o Basic Skills
Occupational Skills	Proficiency to perform actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels	Tool • Varies ETO • Program Suitability Review TouchPoint o Occupational Skills
Prior Work Experience	An individual's work history, including paid/unpaid and subsidized/unsubsidized positions	Tool • Life Domain Profile TouchPoint ETO • Employment Record TouchPoint • Program Suitability Review TouchPoint o Work History

WIOA Element	Definition	Tools and ETO Data Sources
Employability	Demonstrated level of knowledge, skills, abilities, work behaviors and attitudes necessary to compete successfully in the labor market	<u>Tool</u> • Varies <u>ETO</u> • Program Suitability Review TouchPoint ○ Career Competencies
Interests	Things an individual likes to do regardless of skill	<u>Tool</u> • Varies <u>ETO</u> • Program Suitability Review TouchPoint ○ Interests
Aptitudes	An individual's natural or acquired talents or abilities	<u>Tool</u> • Varies <u>ETO</u> • Program Suitability Review TouchPoint ○ Aptitudes
Supportive Service Needs	Those services that enable an individual to participate in WIOA activities (ex: transportation, child care, housing)	<u>Tool</u> • Life Domain Profile TouchPoint <u>ETO</u> • Supportive Services Referral TouchPoint • Program Suitability Review TouchPoint ○ Supportive Service Needs
Developmental Needs	Those items, materials, situations, steps or acts that need to occur to aid in the growth of an individual or to assist an individual to realize or meet their potential	<u>Tool</u> • Personal Development Profile for Youth Ages 16-24 <u>ETO</u> • Personal Development Profile for Youth Ages 16-24 TouchPoint • Program Suitability Review TouchPoint ○ Developmental Needs

References

20 CFR 681 – Youth Activities under Title I of the Workforce Innovation and Opportunity Act

Youth Glossary of Terms and Definitions. Montana Department of Labor & Industry. http://wsd.dli.mt.gov/wioa/policy-manual. Accessed 5/25/2016.

Appendix B. Sample Goals

<u>Goal Setting</u>

Goal setting is an important piece of a participant's Individual Service Strategy. Short-term and long-term goals motivate participants and create opportunities for a participant to measure incremental success towards a larger goal. A goal identifies what you want to accomplish and the objectives list action steps in order to accomplish set goal. A goal should be specific, measureable, attainable, realistic, and trackable/time-bound (SMART).

At a minimum, a participant must have one goal set for each applicable performance indicator. Each goal should have three (3) to five (5) objectives. Goals are organized and tracked in ETO with the Goal Tracker TouchPoint.

<u>Sample Goals</u>

Sample Goal #1:

Goal- Increase math literacy.

Objectives/Action Steps- 1. Attend tutoring twice a week.

2. Complete daily homework assignments.

3. Take practice test.

Sample Goal #2:

Goal- Enroll in nursing training program before September start date.

Objectives/Action Steps- 1. Research local training programs and pick up enrollment paperwork.

2. Complete FASFA forms.

3. Submit registration forms by due date.

Sample Goal #3:

Goal- Find a job as a Machinist.

Objectives/Action Steps- 1. Research local industry information including local companies, job requirements and median wages.

2. Create a resume.

3. Submit resume to staff for review.

4. Submit 3 applications a week for employment.

Sample Goal #4:

Goal- Secure reliable child care.

Objectives/Action Steps- 1. Submit paperwork for Care4Kids.

2. Research child care providers near home (or work/school) that have hours that accommodate my work/school schedule.

3. Enroll child in daycare program.

4. Plan out transportation schedule to drop off and pick up child.

Goal Do's and Don'ts

Do: Create clear, measurable goals.

Don't: Focus only on long-term goals.

Do: Create goals <u>with</u> participant.

Don't: Tell a participant what their goals need to be without explaining how it connects to their larger goal.

Do: Create goals that connect to a person's core values.

Don't: List objectives or action steps that do not directly relate to goal.

Do: Identify timelines and check-ins for each objective.

Do: Celebrate victories, big or small!