ASSESSMENT, INDIVIDUAL DEVELOPMENT PLAN AND CAREER DEVELOPMENT PLAN

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I. BACKGROUND

Comprehensive Evaluation (CE): The Comprehensive evaluation is a key tool in leading participants directly to employment since job search continues to be the most appropriate pathway for many participants. For other participants, the comprehensive evaluation leads to employment through training or supported work programs. In some instances, participants receive services to help resolve issues while participating in work-related activities. The Comprehensive Evaluation will contain the following:

- **DSHS Foundation:** Conducted by the DSHS WorkFirst Program Specialist, the foundation gathers family information and circumstances that can impact the participant's participation, contributes to the development of an employment plan, and identifies participants who are directed to LEP services, child-only cases, those who are exempt from WorkFirst participation, and minor participants.

- **DSHS Final Decision/IRP Development:** Together with the participant, the DSHS WorkFirst Program Specialist and/or the DSHS WorkFirst Social Worker review recommendation(s), special records, and other relevant information and develops the IRP, which establishes the "core" and/or "non-core" activities the participant will be participating in such as job search, education, job skill training, and/or supported work programs.

II. POLICY

Assessment: An assessment must be completed on all Commerce WorkFirst Program participants prior to the development of their Individual Development Plan (IDP) or Career Plan. A critical part of the assessment is reviewing the Comprehensive Evaluation that was conducted by DSHS. The Comprehensive Evaluation will assist the Commerce Case Manager in identifying additional information to ensure that the participant's training and worksite are appropriate. The assessment will determine education and job skill level, workplace behavior, and identify barriers

as well as interpersonal and vocational training goals both on the job and off the job. The Commerce WorkFirst Program Stacking Activities (Attachment 1) will assist Commerce case managers in identifying possible stacked activities while in the programs. Contractors will have up to 10 business days upon acceptance of CJ referral to place a participant in a stacked activity. If the most meaningful stacked activity is not available within those 10 business days, stack the participant with an alternate stacked activity until the other is available.

Prior Commerce Program: Upon receipt of a referral, if a previous Commerce Program IDP or Career Plan has been created, Contractors **must obtain approval from the Board** to re-enroll the participant.

Individual Development Plan and Career Plan: The IDP is for participants enrolled in Community Jobs programs. The IDP is developed based on the information provided by the assessments. The IDP sets forth the participant's responsibility to work, look for work, or prepare for work, and will identify the services to be provided, and shall justify the decisions for services provided and referral to other training opportunities.

The IDP is a case management tool for case managers to work towards resolving a participant's barriers/issues to employability. Developing the IDP with the participant teaches them how to locate the resources and identify strategies to manage or resolve their barriers while they continue to work towards self-sufficiency.

Case management typically includes:

- Intake
- Meeting with the client
- Planning (creating the action plan)
- Coordinating services (providing resources or referring)
- Coordination of action plan (implementing the action plan)
- Monitoring progress and problem-solving (monthly updates)
- Reassessment (has the goal been met?)
- Closure

Action plans provide the participant with a clear plan for addressing an issue or resolving a barrier. As with case notes, action plans inform about who, what, where, why, and when. The Commerce WorkFirst programs have two types of "managed" barriers:

1. Case-managed barriers, which require in-depth assistance of a case manager (For Community Jobs one must be active for the duration of the program)

2. Self-managed barriers, which are managed by the participant, but could be active barriers to employment at any time. Substance abuse is an example. Someone may be in recovery for 2 years and feel they have it managed, but a relapse could require case management as they get back on track.

Here are the necessary elements of an action plan:

Element	Questions to be Answered
Barrier/Issue	What is the barrier/issue that needs to be addressed? Which IDP barrier will you choose?
Goal/Resolution	Is it reasonable? Is it attainable? Is it measurable? What does "done" look like?
Case manager actions/timeline	What resources and actions will the case manager take? When?
Parent actions/timeline	What steps will the parent take? When?
Resolved	What does "done" look like?

With any good case management, the action plan is monitored (per the Scope of Work and Guidelines the IDP is updated once per month) and the updates are documented within the IDP. Monthly updates include the status of the action plans (and timeframe) and whether any new actions are needed or if anything else has changed. They are also a chance to "celebrate the success" of the parent working toward resolving issues

Here is an example of a case-managed action plan:

Action Plan Element	IDP Action Plan
Barrier/Issue	**Debt/Household Budgeting:** Martha has debt ($2,000) from unpaid Dept. of Licensing (DOL) fines and is in danger of going to collections.
Goal/Resolution	Martha will set up a monthly payment plan with DOL
Case manager actions/timeline	Case Mgr. will: • Provide parent with DOL repayment phone number • Provide parent with a budget worksheet and review the budget with Martha to determine a reasonable monthly payment amount • Review how to approach DOL and work out a payment plan
Parent actions/timeline	Martha will: • Complete the budget worksheet and determine a monthly payment amount • Contact DOL by December 30th to set up a payment plan • Have the plan set up by January 30th
Resolved	Martha will provide the case manager with a copy of the payment plan approved by DOL. She now pays $25/month to DOL.
Updates	December update: Martha was provided with the DOL phone # (360-xxx-xxxx) and a budget sheet. We will meet tomorrow at 1pm to come up with a monthly payment. January update: We met and determined that $25/month was a good payment amount that Martha will continue to pay after her CJ eds. She

	meets with DOL tomorrow and will bring the approved payment plan in the next two weeks February update: Martha brought a copy of the approved payment plan. This has a resolution plan.

It is important to note that it is not reasonable to pay off the entire debt during Martha's 9-month CJ program. However, through monthly payments, Martha can make progress toward entirely resolving the issue.

Ultimately, the format of the action plan can be narrative, lists, or whatever clearly addresses the action plan elements. Remember to put this in an easy-to-use format for your parent.

Here is an example of a self-managed action plan:

Action Plan Element	**IDP Action Plan**
Barrier/Issue	**Substance Abuse/Recovery:** John has been clean and sober for one year.
Goal/Resolution	John to stay clean and sober and continue attending 12-step meetings 2x/week
Case manager actions/timeline	The case manager will check in with John twice a month and see how his recovery is going.
Parent actions/timeline	John will continue to attend his 2x/week meetings and let me know if there are any concerns about a relapse.
Resolved	John will continue to stay clean and sober
Updates	December update: John reported that he continues to attend his 2x/weekly meetings. January update: John reported that he had some thoughts about using. He contacted his sponsor and they worked through it. February update: John let me know that his recovery is stronger than ever. He now meets his sponsor once a week for coffee.

The IDP must be updated at a minimum of once a month and case managers should contact the participant a minimum of twice per month. Monthly contact with the worksite supervisor is required. Contact can include in-person conversations, worksite visits, phone calls, or emails. Worksite Evaluations or case note documentation must include the method of contact and a summarization of the conversation. Monthly contact should include follow-up on any issues identified in the worksite evaluation. The IDP will be recorded in eJAS.

The sections of the IDP are as follows:

- Work Skills & Education
- Career Planning
- Transportation
- Childcare
- Barriers
- Worksite Placement

- Worksite Evaluation
- Education
- Job Readiness/Job Hunting
- Life Skills
- Community Service/Volunteer
- Hold
- Exit

Career Plan: A Career Plan will be developed for each participant who is engaged and enrolled in the Community Works Program. The Career Plan will contain information specific to the education pathway and identify worksite options to support the participant's career goals. Community Works work assignments must be coordinated with public or non-profit organizations and provide job training in the participant's chosen career field. The plan will clearly define the work schedule, duties and transferable skills being obtained. Participants are required to sign their Career Plan whenever program expectations or requirements change.

Contractors shall report the monthly participation and progression status of each participant using eJAS between the 1st and 10th of the following month on the previous month's activities. At the end of the 11th month or one month prior to the end of the Community Works Program, the Contractor will include their suggestions for the next steps at the completion of the program.

Participant Participation Requirements Change: Anytime a participant's participation requirements change, the IDP must be updated. Participants are required to sign their initial IDP that is developed with their Commerce case manager. Whenever their program expectations or requirements change, the Contractor will update the IDP. Anytime an update is made to the IDP regarding a change in the program expectations or requirements, the Contractor will either have the participant sign the most updated plan or will get verbal approval from the participant.

If verbal approval is received, the Contractor will enter an eJAS case note under the "Participation" note type. The eJAS "Participation" case note will document the specific program expectation or requirement that changed as well as the date the participant verbally agreed to the plan. A copy of the verbally agreed-upon plan will then be sent to the participant by the Contractor, which will also be noted in the case note.

If the participant is present to sign the updated IDP, the Contractor will provide a copy of the signed IDP to the participant and maintain a copy in their file.

ATTACHMENTS

- Attachment 1: Commerce WorkFirst Program Stacking Activities