

**WIOAP 01-19**

**DATE:** April 27, 2020  
**TO:** All WIOA Subrecipients  
**FROM:** Danilo Cabrera  
**SUBJECT:** Individual Service Strategy Policy

1. Purpose:

To communicate to field staff, the requirement's associated with the Individual Service Strategy (ISS).

2. Policy:

The ISS is a distinct plan designed specifically for WIOA Program participants and is based on the information obtained during the objective assessment. The ISS will serve as the basis for the entire case management service strategy and as a guide for delivery of appropriate services.

Career planners must update the ISS on an ongoing basis by documenting the program elements provided, the participant's progress, activities completed, benchmarks reached and any other accomplishments, regardless of who provides the program element. Additionally, the ISS must be updated to reflect new and/or removed program elements. The strategy should be reviewed and updated as needed to evaluate each participant's progress towards their goals and objectives while in the program.

The ISS, along with case notes, shall be used as the means to record the decisions made regarding the combination and sequence of services for the benefit of the participant. Again, the ISS must document the services provided to the individual. If changes should occur in the participant's employment goals and/or services, the ISS must reflect these changes. In addition, it must also contain a post-employment strategy given that most WIOA performance indicators are counted post-exit. The ISS must directly link to one or more of the performance indicators.

For each WIOA participant, the ISS must identify and document the following:

- Objective assessment of current academic and skills levels, basic and occupational skills, prior work experience, employability, interests & aptitudes, developmental, financial, social, and supportive service needs;
- The educational goal(s);
- The employment goal(s), including, when appropriate, non-traditional employment goals;
- Appropriate career pathway;
- Appropriate achievement objectives;
- Appropriate services, the sequence and mix of the services, and justification for the services to be provided;
- Any referral(s) to other services/programs;

Any information that describes an individual's medical condition or disability must be maintained in a separate file consistent with policies and procedures and reference made to the separate file.

3. References:

- WIOA Sec. 129(c)(1)(B)
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- WIOA Sec. 129(c)(1)(B)
- 20 CFR §681.320(b)(3)
- 20 CFR §681.420(a)(1)
- 20 CFR §681.420(h)
- TEGL 21-16, p. 8

Direct Inquiries to: WIOA/TAA Mailbox