INDIVIDUAL SERVICE PLAN

About this Tool: A service plan should be developed with clients soon after intake to identify the steps that must be taken to move them towards the goal of independent living. Make sure that the service plan addresses any specific issues that come out of the intake process and the discussion about available mainstream resources. The plan should include goals, strategies/steps for achieving each goal, target completion dates, and dates goals are achieved. While the plan should be developed with client input, many of the goals can be pre-established by your program (see examples provided below). Collaborate with any other agencies with whom your client may be working to ensure that the goals and strategies laid out for the client are consistent with the goals and strategies of any other program in which he/she may be participating.

Client Name: ________________________________ Date of Intake: ____/____/_____

Case Manager: ________________________________ Client DOB: _____/____/_____

Part 1: Health and Wellness

Goal	Strategies/Steps	Target Date	Dated Achieved	Notes
1. Maintain Sobriety / Harm Reduction	1.			
	2. Attend weekly peer group support meetings.			
	3.			
	4.			
	5.			
2. Mental health	1. Access outpatient services			
	2. Attend daytime support groups			
	3. Keep all therapy appointments.			
	4.			
	5.			
3. Family Reunification	1. Attend family counseling			
	2. Attend parenting classes			
	3.			
	4.			

	5.			

Client Strengths: ____

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Client Obstacles: ____

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Progress Summary: ____

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Part 2: Employment and Financial Stability

Goal	Strategies/Steps	Target Date	Date Achieved	Notes
1. Obtain Employment	1. Obtain needed documentation (e.g., State ID, Social Security Card, Work Permit)			
	2. Referral to Job Training and Placement Provider			
	3. Locate childcare			
	4.			
	5.			
2. Maintain Employment for Minimum of 6 Months	1. Receive job coaching/workplace etiquette training (punctuality, professional boundaries, conflict resolution, dealing with personal emergencies, etc.)			
	2. Identify childcare and transportation contingency plans (e.g., what to do when childcare or transportation falls through).			
	3.			
	4.			
	5.			
3. Repair credit history.	1. Develop household budget and discuss methods for staying within budget.			

	2. Request and review credit report. Work with case manager to contact creditors and develop payment plans for delinquent bills. (Obtain letters from creditors varying payment plans.)			
	3.			
	4.			
4. Financial Stability	1. Develop household budget (see #3 above).			
	2. Attend financial management workshop.			
	3. Open a checking and savings account.			
	4. Save at least one month's rent			
	5. Access available mainstream resources to supplement income			
	6. Review eligibility for Earned Income Tax Credit.			

Client Strengths: ____

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Client Obstacles: ____

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Progress Summary: ____

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Part 3: Housing Stability

Goal	Strategies/Steps	Target Date	Date Achieved	Notes
1. Rebuild Housing History	1. Develop payment plans with landlords to whom you are in arrears.			
	2. Attend tenant education workshop.			
	3.			
	4.			
	5.			

2. Permanent Housing	1. Submit applications for subsidized housing programs.			
	2. Save at least one month's rent.			
	3.			
	4.			
	5.			
	5.			

Client Strengths: ____

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Client Obstacles: ____

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Progress Summary: ____

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Case Manager Signature Date

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Client Signature Date