

# Academic and Career Plan and Individual Service Strategy

## SECTION I: Identification

### Customer Name

**Name:** Keith Peiffer

**Last Four Digits SSN:** 123-45-6789

## SECTION II: Informational Interview

### Purpose for Visit

Laid off from job in Factory XYZ and need to get a new job.

### Educational Background

H.S. Diploma, Welding certification

### Work History

Worked for 20 years in Factory XYZ on the assembly line.

### Career Interests

I would like to do something where I can work with my hands in a field that I am going to be able to find and retain employment long term.

### Needs and Barriers

I understand that it will be difficult to find another job without some type of training or certification. I am willing to explore all possible career options.

### Track

Job-to-training-job

### Next Steps

Take all three assessments on ICE and the TABE prior to meeting next with week with the ACC.

## SECTION III: ACP

### Employment Goals and Work History

#### Work History:

**Employer** Factory XYZ

**Dates of Employment:** 05/01/1991 to 06/01/2011

**Position Held** Assembly Line Worker

**Responsibilities** Assembled widgets

#### Long Term Employment Goal:

**Comment [OJ1]:** he CM met with Keith and came up with the following information through discussion with Keith.

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Carpenter for a Commercial Construction Company

## **Short Term Employment Goal:**

Carpentry Apprenticeship

## **Notes:**

Eventually, Keith would like to work for a large commercial construction company but is going to begin with an apprenticeship through the Associated Builders and Contractors in order to get the necessary training and experience.

## **Strengths and Weaknesses**

**Strength:** Transferable Skills

**Notes:** Keith has skills such as attention to detail and extensive experience in operating equipment, which will help him be successful in this line of work.

**Strength:** Work History

**Notes:** Keith was a reliable and responsible employee for 20 years at his previous job. This will make him an ideal candidate for future employers.

## **Needs and Barriers**

**Needs and Barriers:** Dislocated Worker

## **Plan For Overcoming Identified Needs and Barriers:**

Pursue training in Carpentry, which is in demand in my region. This should allow me to find gainful employment which will provide a steady income job security.

## **Action Step:**

Work with Jennifer (ACC) to put together a plan that will help me successfully attain employment as a Carpenter. This plan will include some Adult Ed classes which will be outlined in the Education Plan section of this document.

**Needs and Barriers:** Lack of Transferable Skills

## **Plan For Overcoming Identified Needs and Barriers:**

Pursue training in Carpentry, which will help me gain the skills that I need to obtain employment as a Carpenter.

## **Action Step:**

Work with Jennifer (ACC) to identify local training programs, through INTraining, in the area of Carpentry.

**Needs and Barriers:** Education

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## **Plan For Overcoming Identified Needs and Barriers:**

Since I lack the training and skills necessary to pursue a job as a Carpenter I will pursue training in the field of Carpentry.

### **Action Step:**

Work with Jennifer (ACC) to identify local training programs in Carpentry.

**Needs and Barriers:** Education

## **Plan For Overcoming Identified Needs and Barriers:**

Raise my TABE math score to the level necessary to successfully enter and complete training in Carpentry.

### **Action Step:**

Attend classes at Adult Ed Central to help raise my TABE math score from the 9<sup>th</sup> grade level to the 11-12.9 level.

### **Notes**

## **Action Plan**

**Date Set:** 06/01/2011

**Goal Type:** Career

### **Description:**

Obtain work as a Carpenter

### **Action Step:**

Successfully complete the Carpentry Apprenticeship Program.

### **Action Step:**

Use ICC and other resources to locate and apply for Carpentry positions.

**Status:** Set but Unattained

**Planned Date of Attainment:** 11/01/2015

**Date of Attainment:** mm/dd/yyyy

**Date Set:** 06/01/2011

**Goal Type:** Basic Skills

### **Description:**

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Raise my TABE math score from 9 to 11-12.9 in order to be considered for any Carpentry training programs.

**Action Step:**

Attend classes at Adult Ed Central which I was referred to by my ACC. There I will improve my TABE math score to a GE score of 11.

**Status:** Set but Unattained

**Planned Date of Attainment:** 08/01/2011

**Date of Attainment:** mm/dd/yyyy

**Date Set:** 06/01/2011

**Goal Type:** Training Goal

**Description:**

Gain acceptance into a Carpentry Apprenticeship Program.

**Action Step:**

Use INTraining to search for carpentry programs in my area. I will then contact the program's providers to enquire about the application and enrollment process.

**Action Step:**

Apply to all Carpentry Apprenticeship Programs that meet my needs and requirements discussed in this document by September 1st.

**Status:** Set but Unattained

**Planned Date of Attainment:** 09/01/2011

**Date of Attainment:** mm/dd/yyyy

**Date Set:** 06/01/2011

**Goal Type:** Work Readiness Goal

**Description:**

Create a resume, practice interviewing skills and learn how to search and apply for jobs prior to the end of my apprenticeship.

**Action Step:**

Attend workshops through the WorkOne to assist in resume writing, interviewing, and the job search process.

**Status:** Set but Unattained

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**Planned Date of Attainment:** 08/01/2015

**Date of Attainment:** mm/dd/yyyy

## Training Information

**Co-Enrolled in Adult Education:** Yes

**Co-Enrolled in WIA Adult/Youth:** No

### **Occupational Skills Needs:**

High School Diploma/GED is required. H.S. Diploma obtained in 1991.

Need TABE Math Grade Equivalent of 11-12.9. Scored at grade level 9. Referred to Adult Ed Central for remedial math courses.

**Date Drug Test Administered:** 09/15/2011

**Results: Pass/Fail:** Pass

**Enrollment Date:** 10/01/2011

**Training Provider:** Associated Builders and Contractors

**Training Program:** Carpentry Apprenticeship

**Training Program ID:** 2753

**Completion Date:** mm/dd/yyyy

**Career Certification Program:** No

### **Adult Education/Remediation Needs:**

Need to raise TABE math score from grade level equivalent 9 to grade level equivalent 11-12.9.

### **Assistive Technology Needs for Persons with Disabilities for Attaining Career Goals:**

### **Required Supportive Services During Active Participation:**

### **Post Employment Needs:**

### **Notes:**

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## Financial Plan

**ITA Issued:**

**Begin Date:** 10/01/2011

**End Date:** 10/01/2015

**Amount:** 4500.00

**Demand Occupation (O\*NET-SOC):** 47-2031.00

**Pell Grant Issued:**

**Begin Date:** mm/dd/yyyy

**End Date:** mm/dd/yyyy

**Amount:** 0.00

**Other Grants/Scholarships:**

**Begin Date:** mm/dd/yyyy

**End Date:** mm/dd/yyyy

**Amount:** 0.00

**Customer Contribution:** 1572.00

**Total Funds Available:** 0.00

**Program Cost:** 6072.00

**Balance of Funds Less Program Cost:** 0.00

## SECTION III: ASSESSMENT INFORMATION

### COMPASS

**Test Date:** mm/dd/yyyy

**Scores:** Reading Writing Math

**Pass/Fail:** Select One

**Notes:**

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## Accuplacer

Test Date: mm/dd/yyyy

Scores: Reading Writing Math

Pass/Fail: Select One

Notes:

## Indiana Career Explorer

Assessment Date: 05/15/2011

Kuder Career Search With Person Match: Gov't and Public Admin Architecture and Construction Manufacturing

Kuder Skills Assessment: Architecture and Construction Manufacturing Science, Tech. Engineering and Math.

Kuder Work Values Inventory: Security Income Lifestyle

Notes:

## Worldwide Interactive Network (WIN)

Assessment Date: mm/dd/yyyy

Test Code: Select One

Level: Select One

Test Score – Percentile: Applied Math Applied Technology Listening Locating Information Observation Reading for Information Team Work Writing Business Writing Work Habits

Notes:

## Work Keys

Assessment Date: mm/dd/yyyy

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**Test Score:** Applied Math   Applied Technology   Listening   Locating Information  
Observation   Reading for Information   Team Work   Writing   Business Writing  
Work Habits

**Does Customer Meet Minimum Qualifications for Profiled Job:** Select One

**Basic Skills Deficient:** Select One

**Notes:**

## **Other Assessment**

**Assessment Date:** mm/dd/yyyy

**Form:** Select One

**Test Score - Raw:**

**Test Score – Scaled:**

**Test Score – Grade Equivalent:**

**Basic Skills Deficient:** Select One

**Notes:**

## **TABE**

**Assessment Date:** 05/15/2011

**Test Code:** Pre-Test

**Series:** 9

**Level:** D

**Test Score – Raw:** Applied Math - 30   Math Computation - 31

**Test Score – Scaled:** Applied Math - 580   Math Computation - 580

**Test Score – Grade Equivalent:** Applied Math - 9   Math Computation - 9

**Test Score – Total Math Score:** Scaled - 563   Grade Equivalent - 8.8

**Basic Skills Deficient:** No

**Notes:**

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In order to enter a Carpentry Apprenticeship Program Keith must score at the 11-12.9 grade level in math. He was referred to Adult Ed Central for remediation.

**Assessment Date:** 05/15/2011

**Test Code:** Pre-Test

**Series:** 9

**Level:** M

**Test Score – Raw:** Reading - 49

**Test Score – Scaled:** Reading - 680

**Test Score – Grade Equivalent:** Reading - 12.9

**Basic Skills Deficient:** No

**Notes:**

## **TABE CLAS-E**

**Assessment Date:** mm/dd/yyyy

**Test Code:** Select One

**Level/Form:**

**Test Score – Raw:** Reading    Listening    Writing    Speaking

**Test Score – Scaled:** Reading    Listening    Writing    Speaking

**Test Score – Grade Equivalent:** Reading    Listening    Writing    Speaking

**Notes:**

## **SECTION IV: Customer Commitment**

### **Customer Agreement**

I agree to follow the academic and career plan by working toward the achievements of the goals outlined above. I will attend classes/workshops, complete my assignments, ask for help when I need it, and make a genuine effort to achieve my goals. If changes need to be made to my academic and career plan, my case manager and I will make a new agreement.

Customer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Case Manager's Agreement:**

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As the customer's case manager, I will do everything possible to help the customer achieve the above goals by providing appropriate guidance and by reviewing the customer's progress at regular intervals. I understand that if changes need to be made in the academic and career plan, the customer and I will make a new agreement.

Case Manager's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### SECTION V: Progress and Review

#### CASE NOTE

**Date:** 07/01/2011

**Type:** Phone

#### **Notes:**

CM called one month after initial meeting. Customer has begun classes at Adult Ed Central. He reports that classes are going well, and that he is taking his TABE post-test next week. He anticipates reaching his goal of a GE score of 11.0 because his remediation is indicating rapid progress. The customer has scheduled a follow up meeting for 08/01/2011 to discuss his progress and schedule a meeting to discuss next steps in pursuing training.

#### CASE NOTE

**Date:** 08/01/2011

**Type:** Face-to-Face

#### **Notes:**

ACC met with Keith to discuss next steps in pursuing training now that he has reached his AE goal of a TABE 11-12.9 math score. ACC introduced Keith to INTraining and instructed Keith to research three training programs in the area of carpentry and to come back with that information in on the fifth to discuss.

#### CASE NOTE

**Date:** 08/05/2011

**Type:** Face-to-Face

#### **Notes:**

ACC met with Keith to discuss his research and assist him in choosing training programs to apply to. Keith found the Carpentry Apprenticeship Program with Associated Builders and Contractors and is going to apply. The program begins on October 1<sup>st</sup> and he is more than ready

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to begin this training. Keith will let the ACC know when he has been accepted and agrees to keep in contact and return to the WorkOne over the next four years to work on his career readiness skills through workshops such as Resume Writing and Interviewing Skills.

**Date:** 09/15/2011

**Type:** Phone

**Notes:**

CM talked with Keith to share information with him about his ITA and his drug test results. Keith is now ready to begin the Carpentry Apprenticeship.

DRAFT

