

INDIVIDUAL SERVICE PLAN

About this Tool: A service plan should be developed with participants 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 participant input, many of the goals can be pre-established by your program (see examples provided below). Collaborate with any other agencies with whom the participant may be working to ensure that the goals and strategies laid out for the participant are consistent with the goals and strategies of any other program in which he/she may be participating.

Participant Name: _____

DOB: ____ / ____ / ____

Case Manager: _____

Date of Intake: ____ / ____ / ____

PART 1: HEALTH AND WELLNESS

Goal	Strategies/Steps	Target Date	Date Achieved	Notes
1.	1.			
	2.			
	3.			
	4.			
	5.			
2.	1.			
	2.			
	3.			
	4.			
	5.			
3.	1.			

	2.			
	3.			
	4.			
	5.			

Client Strengths: _____

Client Obstacles: _____

Progress Summary: _____

PART 2: EMPLOMENT AND FINANCIAL STABILITY

Goal	Strategies/Steps	Target Date	Date Achieved	Notes
1.	1.			
	2.			
	3.			
	4.			
	5.			
2.	1.			
	2.			
	3.			
	4.			
	5.			

3.	1.			
	2.			
	3.			
	4.			
4.	1.			
	2.			
	3.			
	4.			
	5.			
	6.			

Client Strengths: _____

Client Obstacles: _____

Progress Summary: _____

PART 3: HOUSING STABILITY

Goal	Strategies/Steps	Target Date	Date Achieved	Notes
1.	1.			
	2.			
	3.			
	4.			
	5.			
2. Permanent Housing	1.			
	2.			
	3.			
	4.			
	5.			
	5.			

Client Strengths: _____

Client Obstacles: _____

Progress Summary: _____

Client Signature

Date

Case Manager Signature

Date