Service Standards

Workforce Development and Support Services

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

Definition

Workforce Development and Support Services engage in partnerships within the community to provide information and referral; educational opportunities; job training, placement, and follow-up; and financial asset-building services to facilitate educational advancement and success; job acquisition, retention, and progression; and economic mobility. Services are person-centered and driven by the individual's preferences, needs, and employment goals. Workforce development programs adopt a dual-customer approach by providing services that address the needs of both employers and job seekers.

Examples: *Individuals receiving workforce development services can include, but are not limited to, any of the following populations: (a) individuals receiving public assistance; (b) adolescents and adults without a high school diploma; (c) adolescents and adults involved with the justice system; (d) migrant and seasonal workers; (e) resettled immigrants and refugees; (f) older adults returning to the workforce after retirement; (g) dislocated or low-wage incumbent workers; and (h) veterans of the military looking for civilian work.*

Note: *Please see WDS Reference List for the research that informed the development of these standards.*

Table of Evidence

Self Study Evidence

No Self Study Evidence

Workforce Development and Support Services

WDS 1: Person-Centered Logic Model

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization implements a program logic model that describes how resources and program activities will support the achievement of positive outcomes.

Note: *Please see the Logic Model Template for additional guidance on this standard.*

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

Logic models have been implemented for all programs and the organization has identified at least two outcomes for all its programs.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Logic models need improvement or clarification; or
- Logic models are still under development for some of its programs, but are completed for all high-risk programs such as protective services, foster care, residential treatment, etc.; or
- At least one desired outcome has been identified for all of its programs.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Logic models need significant improvement; or
- Logic models are still under development for a majority of programs; or
- A logic model has not been developed for one or more high-risk programs; or
- Outcomes have not been identified for one or more programs.

4

Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- Logic models have not been developed or implemented; or
- Outcomes have not been identified for any programs.

Table of Evidence

Self Study Evidence

*	• Program logic model that includes a list of outcomes being measured	

- See program description completed during intake

Site Visit Evidence

No Site Visit Evidence

On-Site Activities

*

- Interviews may include:
    1. Program director
    2. Relevant personnel

WDS 1.01

A program logic model, or equivalent framework, identifies:

a. needs the program will address;
b. available human, financial, organizational, and community resources (i.e. inputs);
c. program activities intended to bring about desired results;
d. program outputs (i.e. the size and scope of services delivered);
e. desired outcomes (i.e. the changes you expect to see in persons served); and
f. expected long-term impact on the organization, community, and/or system.

Examples: *Please see the W.K. Kellogg Foundation Logic Model Development Guide and COA Accreditation's PQI Guide for more information on developing and using program logic models.*

Examples: *Information that may be used to inform the development of the program logic model includes, but is not limited to: (a) characteristics of the service population; (b) needs assessments and periodic reassessments; and (c) the best available evidence of service effectiveness.*

WDS 1.02

The logic model identifies at least two outcomes appropriate to the program or service population.

Interpretation: *Outcomes data should be disaggregated to identify patterns of disparity or inequity that can be masked by aggregate data reporting. See PQI 5.02 for more information on disaggregating data to track and monitor identified outcomes.*

Workforce Development and Support Services

WDS 2: Personnel

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

Program personnel have the competency and support needed to provide services and meet the needs of persons served.

Interpretation: *Competency can be demonstrated through education, training, or experience. Support can be provided through supervision or other learning activities to improve understanding or skill development in specific areas.*

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- With some exceptions, staff (direct service providers, supervisors, and program managers) possess the required qualifications, but the integrity of the service is not compromised; or
- Supervisors provide additional support and oversight, as needed, to the few staff without the listed qualifications; or
- Most staff who do not meet educational requirements are seeking to obtain them; or
- With few exceptions, staff have received required training, including applicable specialized training; or
- Training curricula are not fully developed or lack depth; or
- Training documentation is consistently maintained and kept up-to-date with some exceptions; or
- A substantial number of supervisors meet the requirements of the standard, and the organization provides training and/or consultation to improve competencies when needed; or
- With few exceptions, caseload sizes are consistently maintained as required by the standards or as required by internal policy when caseload has not been set by a standard; or
- Workloads are such that staff can effectively accomplish their assigned tasks and provide quality services and are adjusted as necessary; or
- Specialized services are obtained as required by the standards.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- A significant number of staff (direct service providers, supervisors, and program managers) do not possess the required qualifications and, as a result, the integrity of the service may be compromised; or
- Job descriptions typically do not reflect the requirements of the standards, and/or hiring practices do not document efforts to hire staff with required qualifications when vacancies occur; or
- Supervisors do not typically provide additional support and oversight to staff without the listed qualifications; or
- A significant number of staff have not received required training, including applicable specialized training; or
- Training documentation is poorly maintained; or
- A significant number of supervisors do not meet the requirements of the standard, and the organization makes little effort to provide training and/or consultation to improve competencies; or
- There are numerous instances where caseload sizes exceed the standards' requirements or the requirements of internal policy when a caseload size is not set by the standard; or
- Workloads are excessive, and the integrity of the service may be compromised; or
- Specialized staff are typically not retained as required and/or many do not possess the required qualifications; or
- Specialized services are infrequently obtained as required by the standards.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards.

Table of Evidence

Self Study Evidence

*	• Table of contents of training curricula	
*	• Procedures or other documentation relevant to continuity of care and case assignment	
*	• List of program personnel that includes: 1. Title 2. Name 3. Employee, volunteer, or independent contractor 4. Degree or other qualifications 5. Time in current position • See organizational chart submitted during application	

Site Visit Evidence

*	• Sample job descriptions from across relevant job categories • Coverage schedule for previous six months documenting availability of supervisors for consultation at all times services are provided • Documentation tracking staff completion of required trainings and/or competencies • Training curricula • Caseload size requirements set by policy, regulation, or contract, when applicable • Documentation of current caseload size per worker, when applicable

On-Site Activities

*	• Interviews may include: 1. Program director 2. Relevant personnel • Review personnel files

WDS 2.01

Supervisors qualified by a bachelor's degree, or equivalent training and experience, are available to provide case consultation at all times services are provided.

WDS 2.02

All direct service personnel are trained on, or demonstrate competency in:

a. identifying informal support networks and community resources;
b. screening topics relevant to the identified service population;
c. understanding common scams or other techniques used to manipulate or take advantage of persons served;
d. using the most up-to-date job search engines, hiring platforms, and networking sites;
e. teaching critical thinking and problem-solving techniques;
f. understanding adult learning principles and styles and the diversity of workforce development approaches;
g. understanding local or state asset limitation regulations and their implications for continued receipt of public assistance;
h. working with diverse populations and/or individuals with unique service needs; and
i. identifying common barriers to employment.

Interpretation: *Training topics may vary based on the specific program model or the needs of the population served.*

Examples: *Regarding element (g), diverse populations with unique service needs can include: (a)veterans; (b) individuals experiencing homelessness; (c) parents; (d) youth; (e) older adults; (f) immigrants, refugees, and migrant or seasonal workers; (g) individuals involved in the justice system; (h) individuals receiving government assistance or other benefits; and (i) individuals with other special needs or circumstances.*

WDS 2.03

Direct service personnel who provide financial asset-building services are trained on, or demonstrate competency in:

a. identifying local programs that provide assistance and/or incentives for financial asset building; and
b. understanding common obstacles to asset building experienced by persons served.

NA: The organization does not provide financial asset-building services.

WDS 2.04

The organization minimizes the number of workers assigned to individuals over the course of their contact with the organization by:

a. assigning a worker at intake or early in the contact; and
b. avoiding the arbitrary or indiscriminate reassignment of direct service personnel.

WDS 2.05

Employee workloads support the achievement of desired outcomes and are regularly reviewed.

Examples: *Factors that may be considered when determining employee workloads include, but are not limited to: (a) the qualifications, competencies, and experience of the worker including the level of supervision needed; (b) the work and time required to accomplish assigned tasks and job responsibilities; and (c) service volume, accounting for assessed level of needs of persons served.*

Workforce Development and Support Services

WDS 3: Community Partnerships

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization creates sustainable and collaborative partnerships with local employers, community service providers, and educational institutions to provide workforce development services that are appropriate, accessible, coordinated, and comprehensive.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- No written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

No Self Study Evidence

Site Visit Evidence

*
- Documentation of regular contact and collaboration with relevant systems, providers, and employers from the previous six months
- Community resource and referral list including community services and potential employers

On-Site Activities

*
- Interviews may include:

1. Program director
2. Relevant personnel
3. Community service providers
4. Employers

WDS 3.01

The organization facilitates regular contact and collaboration with relevant systems and government agencies including, but not limited to:

a. the justice system;
b. physical and behavioral health care providers;
c. educational institutions;
d. the local housing authority;
e. department of human services; and
f. other public benefit agencies.

Examples: *Methods that the organization may use to facilitate regular contact among its community partners include: (a) virtual networking; (b) email/phone; (c) co-location; (d) satellite locations or roving vans; and (e) referral or formal contracting.*

WDS 3.02

The organization establishes community and employer partnerships to:

a. identify employers in need of trained workers and able to offer opportunities for career advancement; and
b. provide job seekers with information and/or referrals to community resources and other supportive services.

WDS 3.03

The organization maintains or has access to a comprehensive, up-to-date list of community service providers and potential employers that includes:

a. name, location, and telephone number;
b. contact person or referral system;
c. services offered;
d. employment type and common vacancies;
e. languages offered;
f. fee structure; and
g. eligibility requirements.

Interpretation: *The organization ensures the list remains up-to-date by maintaining regular contact with community partners through email/phone, by attending local networking events and job fairs, and through individual feedback provided by service providers, employers, or employees.*

WDS 3.04

The organization educates potential employers on the strengths and needs of the individuals it serves and the potential benefits of employing them.

Workforce Development and Support Services

WDS 4: Assessment-Based Employment Planning and Monitoring

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The individual participates in the development and ongoing review of an assessment-based employment plan that is the basis for the delivery of appropriate services and support.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- There are no written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

*	• Assessment procedures	
*	• Copy of assessment tool(s)	

* • Employment planning and monitoring procedures	

Site Visit Evidence

No Site Visit Evidence

On-Site Activities

*

- Interviews may include:

1. Program director
2. Relevant personnel
3. Persons served

- Review case records

WDS 4.01

Individuals participate in an assessment that is:

a. individualized;
b. culturally and linguistically responsive; and
c. completed within established timeframes.

WDS 4.02

Assessments identify the individual's:

a. previous formal and informal work experience;
b. relevant life experience;
c. preferences, interests, aptitudes, and employment goals;
d. relevant credentials;
e. training and educational needs;
f. strengths and coping strategies;
g. informal support networks; and
h. barriers to employment and job retention.

Examples: *Barriers to employment can include: inadequate training or education; lack of employment eligibility, including citizenship status or lack of appropriate documentation or identification; prejudice among employers, local businesses, and citizens; family responsibilities; lack of affordable and quality child care; and lack of reliable transportation.*

WDS 4.03

The organization works with the individual to develop and regularly review an assessment-based employment plan that includes:

a. agreed upon goals, desired outcomes, and timeframes for achieving them;
b. services and supports to be provided, and by whom;
c. documentation of the individual's participation in service planning; and
d. revisions to service goals and plans when needed.

WDS 4.04

The organization works in active partnership with persons served to:

a. assume a service coordination role, as appropriate, when the need has been identified and no other organization has assumed that responsibility;
b. ensure that they receive appropriate advocacy support;

c. assist with access to the full array of services to which they are eligible; and
d. mediate barriers to services within the service delivery system.

Workforce Development and Support Services

WDS 5: Training and Personal Development Services

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization works with community employers to provide persons served with training programs and other personal development opportunities that help individuals acquire the knowledge and skills necessary to achieve employment and job progression.

NA: The organization does not provide training and personal development services.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- No written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

*	• Procedures for reviewing training courses every two years	

*	• Table of contents for job readiness training curricula	
*	• Policy on serving individuals with disabilities	

Site Visit Evidence

*	• Job readiness training curricula • Course descriptions for each training course offered in the previous six months • Training schedules for the previous six months

On-Site Activities

*	• Interviews may include: 1. Program director 2. Relevant personnel 3. Persons served 4. Employers • Review case records

WDS 5.01

The organization reviews its training courses every two years with input from local business, and makes modifications as necessary, to ensure that training programs:

a. reflect current employment trends and labor market conditions;
b. meet the needs of local employers and job seekers; and
c. accommodate diverse learning styles and skill levels when possible.

WDS 5.02

Job readiness training addresses the following, as appropriate to the needs of the individual:

a. workplace practices;
b. workforce diversity;
c. anger management and conflict resolution;
d. work-related interpersonal skills;
e. stress and time management;
f. digital literacy; and
g. financial literacy.

WDS 5.03

Each training course has a written course description including the curriculum, location, and meeting time of training sessions.

WDS 5.04

The organization has taken steps to make training and personal development services accessible for individuals.

Examples: *Organizations may facilitate accessibility by offering flexible training schedules; providing training during times that meet the needs of the service population, including some evening and/or weekend hours, when appropriate; utilizing virtual learning platforms; operating satellite locations or roving vans; and providing individually paced instruction.*

Examples: *Individually paced instruction allows students to skip quickly over material they are familiar with or move slowly through more difficult material. When individually paced instruction is offered through a computer-based program, it is often more effective to provide this in a classroom-style setting where a teacher or trainer is still available if the student has questions.*

WDS 5.05

Individuals have access to a combination of educational programs in accordance with their employment plan that include:

a. degree or certificate programs;
b. ESL courses; and
c. GED or high school courses.

WDS 5.06

Individuals with disabilities are offered professional skill-development training courses in integrated settings, either directly or by referral, as appropriate to their individualized employment objectives.

Workforce Development and Support Services

WDS 6: Job Development and Placement Services

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization helps the job seeker find and retain employment that is consistent with their employment plan.

NA: The organization does not provide job development and placement services.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- No written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

*	• Placement and follow-up procedures	
*	• Procedures for referring individuals to services	

Site Visit Evidence

*

- Sample labor market information provided to job seekers
- Training curricula or other informational materials on job search strategies
- Community resource and referral list including support service providers

On-Site Activities

*

- Interviews may include:

1. Program director
2. Relevant personnel
3. Persons served
4. Employers

- Review case records

WDS 6.01

The organization provides the job seeker with current labor market information, consistent with their employment objectives, including current job listings with salary levels and opportunities for advancement.

WDS 6.02

The organization supports the job seeker's search for employment by helping the individual to develop a job search strategy and improve job search skills including:

a. cover letter and resume writing;
b. networking;
c. interview and negotiation techniques;
d. identifying potential employers;
e. finding, preparing for, and participating in local job fairs; and
f. accessing online resources, including job search engines, hiring platforms, and networking sites.

Interpretation: *The job search strategy and areas targeted for skill development may vary based on the specific program model or the needs of the population served.*

WDS 6.03

To promote job retention, the organization:

a. offers varied placement opportunities;
b. encourages job seekers to pursue living wage jobs;
c. links job seekers to appropriate work supports;
d. provides job placements with potential for advancement; and
e. provides job seekers, either directly or by referral, with needed support services designed to reduce barriers to job retention.

Examples: *Work supports are federally and state-funded programs that provide assistance to low-income families. Examples of work supports include the Earned Income Tax Credit, subsidized child care, food stamps, and cash assistance.*

Examples: *Common barriers to job retention include: (a) family responsibilities; (b) inaccessible or unreliable transportation; (c) insufficient benefits or income; (d) social isolation on the job; (e) lack of dependable childcare; (f) the continued use of alcohol or drugs; and (g) a lack of affordable and dependable housing.*

WDS 6.04

Following a placement, the organization:

a. follows up with the employee, and the employer as appropriate and with the consent of the job seeker, to assess the appropriateness of the placement and address any emerging issues; and
b. continues follow-up and support services, as appropriate and with the consent of the job seeker, to address barriers to job retention or progression.

Workforce Development and Support Services

WDS 7: Financial Literacy

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization promotes the achievement of identified financial goals by providing the individual with the knowledge necessary to understand and effectively manage their finances.

NA: The organization does not provide financial literacy education.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- No written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

No Self Study Evidence

Site Visit Evidence

*
- Training curricula and/or other informational materials on financial literacy topics
- Community resource and referral list including financial service providers

On-Site Activities

*
- Interviews may include:

1. Program director
2. Relevant personnel
3. Persons served

- Review case records

WDS 7.01

The organization provides financial literacy information in plain language with technical terms, abbreviations, and acronyms clearly defined.

WDS 7.02

Financial literacy topics are adjusted according to the identified needs of the group or individual receiving services and include information regarding:

a. predatory lending;
b. banking;
c. the establishment and maintenance of good credit;
d. debt management;
e. paying bills;
f. saving and investing;
g. insurance;
h. tax basics;
i. budgeting;
j. how paid employment may affect eligibility for public benefits;
k. homebuying; and
l. tips for avoiding scams that include verifying the legitimacy of companies, transactions, and requests for information.

WDS 7.03

Direct service personnel provide individuals with contact information for specific resources in the community including places to receive financial advice and debt counseling services.

Workforce Development and Support Services

WDS 8: Financial Asset-Building Services

Purpose

Individuals who participate in workforce development and support services gain access to the educational and supportive services they need to achieve increased economic stability and self-sufficiency.

The organization encourages asset accumulation by working with the individual to save, build assets, manage resources, and plan for crisis.
NA: The organization does not provide financial asset-building services.

Rating Indicators:

1 All elements or requirements outlined in the standard are evident in practice, as indicated by full implementation of the practices outlined in the Practice Standards.

2

Practices are basically sound but there is room for improvement, as noted in the ratings for the Practice Standards; e.g.,

- Minor inconsistencies and not yet fully developed practices are noted; however, these do not significantly impact service quality; or
- Procedures need strengthening; or
- With few exceptions, procedures are understood by staff and are being used; or
- For the most part, established timeframes are met; or
- Proper documentation is the norm and any issues with individual staff members are being addressed through performance evaluations and training; or
- Active participation of persons served occurs to a considerable extent.

3

Practice requires significant improvement, as noted in the ratings for the Practice Standards. Service quality or program functioning may be compromised; e.g.,

- Procedures and/or case record documentation need significant strengthening; or
- Procedures are not well-understood or used appropriately; or
- Timeframes are often missed; or
- Several case records are missing important information; or
- Participation of persons served is inconsistent.

4 Implementation of the standard is minimal or there is no evidence of implementation at all, as noted in the ratings for the Practice Standards; e.g.,

- No written procedures, or procedures are clearly inadequate or not being used; or
- Documentation is routinely incomplete and/or missing.

Table of Evidence

Self Study Evidence

*	• Procedures for referring individuals to services	
*	• Financial resource management planning procedures	

*
- Crisis planning procedures

Site Visit Evidence

*
- Community resource and referral list including support services

On-Site Activities

*
- Interviews may include:

1. Program director
2. Relevant personnel
3. Persons served

- Review case records

WDS 8.01

The organization helps the individual to identify and overcome barriers to asset building by accessing support services provided directly or by referral.

Examples: *Barriers to asset building can include insufficient income; inadequate training or education; lack of affordable and safe housing; inability to access finances; lack of appropriate documentation or identification; prejudice among employers, local businesses, and citizens; predatory lending; difficulty understanding local banking, mortgage, and business systems; family responsibilities; lack of affordable and quality child care; and lack of reliable transportation.*

WDS 8.02

The organization works with the individual to develop a plan for financial resource management including:

a. goal setting;
b. long- and short-term financial planning;
c. record keeping; and
d. controlled spending.

WDS 8.03

The organization works with the individual to establish a plan for responding to unexpected financial crises or hardships.

Example: *Financial hardship may be brought on by life events such as unexpected job loss, natural disaster, or illness.*