

# Follow-Up Services

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# PART I

## What Is *Follow-Up Services*?

Young adults who have completed participation in Workforce Investment Act (WIA) youth programs and entered employment or further education have taken an important step toward a successful transition to adulthood. Follow-up services continue to support youth as they assume adult roles and responsibilities, even after they are no longer WIA participants.

This module of *Focused Futures: Youth Development System Builder* provides information and tools to help local youth councils, WIA administrators, case managers, and service providers conduct systematic follow-up activities for youth who have completed participation in WIA youth programs and entered postsecondary education, advanced training, or unsubsidized employment.

### *Follow-Up Services includes*

- Information on legislative, regulatory, and policy requirements for youth follow-up services
- Effective practices that WIA youth staff can use to provide effective follow-up services
- Information on contracting for follow-up services
- Tools to help follow-up case managers plan, provide, and document follow-up services

## FOLLOW-UP SERVICES AND COMPREHENSIVE YOUTH DEVELOPMENT

Youth development is the process by which youth make the transition from childhood to adulthood. All youth have essential needs that must be met if they are to make this transition successfully. These needs fall into five categories: mental health, physical health, civic and social involvement, intellectual health, and employability.

By the time youth complete participation in WIA youth programs, they should be well on their way toward self-sufficiency in all these areas of their lives. Follow-up can be seen as a transitional period during which caring adults help youth create their own solutions to the challenges they continue to face. A full range of follow-up services can help fill the gaps in the family, educational, and social frameworks that may be missing in the lives of many at-risk youth.



## PURPOSES AND BENEFITS OF FOLLOW-UP SERVICES

When youth have completed the activities planned in their Individual Service Strategies (ISSs) and have attained their individual educational and employment goals, their next step is to start on their actual transition to employment or further education. The intensity of follow-up services varies based on the needs of individual youth. Some youth need very little assistance in their transition, while others need substantial support. As with services provided before the youth's completion of participation, follow-up services must be based on each youth's needs. There is no "one size fits all" follow-up services plan, just as there is no single employment or education plan that works for every youth.

The purpose of follow-up services is to provide continued assistance to youth as needed after completion of participation. That continued assistance helps ensure that each youth's transition to employment or further education is successful – that the youth receives appropriate help in facing challenges that come up on the job, in college, or in occupational skill training.

Follow-up includes any service or activity needed to help youth succeed in employment or further education. In fact, any program activity that was provided while a youth was enrolled as a WIA participant can also be provided after completion of participation if that activity is needed to help ensure the youth's success.

Effective follow-up services go beyond mere data collection; they support youth as they navigate postsecondary education or employment. Effective follow-up services should

- Assist youth in overcoming barriers that may interfere with the achievement of their career objectives
- Provide proactive and reactive interventions to encourage youth retention in education or employment
- Provide supportive services to assist in a youth's advancement to better jobs or postsecondary education and training
- Help troubleshoot employment and personal issues

Follow-up is more than a phone call a few months after completion of participation to see if the youth is employed or in school.

## CHALLENGES IN FOLLOW-UP SERVICES

Some characteristics and needs of the typical at-risk youth served by WIA youth programs can pose a challenge in providing follow-up services.

- Youth can move frequently from one address to another. It's easy to lose track of them.
- Youth often haven't done well in education and other programs; they may be disengaged or alienated.
- Youth may see follow-up as an unwanted intrusion.
- Youth don't want to be labeled by participating in "special programs for problem youth."
- Youth may not know follow-up services are available and how follow-up services help.

## FOLLOW-UP SERVICES AND PERFORMANCE

Effective follow-up services have a direct impact on retention of youth in education and employment beyond completion of participation. Under waiver authority, Common Measures have replaced statutory performance measures in Ohio.

However, Common Measures do not include a retention measure. So, Common Measures should be seen as the starting point for youth performance measurement, and state and local areas should strongly consider using additional performance measures, including a retention measure.

## WHAT'S AHEAD IN FOLLOW-UP SERVICES?

Part II presents detailed information on the requirements in legislation, regulations, and policy for follow-up services.

Part III includes effective practices that follow-up case managers can use to

- Incorporate follow-up services into the ISS at intake
- Explain follow-up services to youth
- Identify each youth's goals, needs, and personal situation
- Develop a written follow-up services plan with each youth
- Provide engaging follow-up activities to keep youth interested and connected
- Provide frequent and regular follow-up activities.
- Develop and maintain a mentoring relationship with each youth
- Coordinate follow-up activities with youth, employers, and academic advisors
- End follow-up services appropriately
- Track and document follow-up activities

Part IV discusses local-area options for contracting for follow-up services and guidelines for successful contracting.

Part V provides tools for follow-up case managers to

- Plan, monitor, and document follow-up services for each youth
- Plan and document what youth have to do during follow-up, record additional needs as they arise during follow-up, and plan ways to meet those needs

# Legislation, Regulations, and Policy

## WHAT ARE FOLLOW-UP SERVICES?

Follow-up services monitor youth success after completion of participation. They provide assistance as needed for a successful transition to employment and further education. Follow-up services can include (20 CFR 664.450(a))

- Leadership development and supportive service activities
- Regular contact with a youth's employer, including assistance in addressing work-related problems that arise
- Assistance in securing better paying jobs, career development, and further education
- Work-related peer support groups
- Adult mentoring
- Tracking the progress of youth in employment after training

### What Are Leadership Development and Positive Social Behaviors?

**Leadership development** is a set of activities that encourage responsibility, employability, and other positive social behaviors. Types of leadership development opportunities include (20 CFR 664.420)

- Exposure to postsecondary educational opportunities
- Community and service learning projects
- Peer-centered activities, including mentoring and tutoring
- Organizational and team work training, including team leadership training
- Training in decision-making, including determining priorities
- Citizenship training, including life skills training such as parenting, work behavior training, and budgeting of resources

**Positive social behaviors**, often called *soft skills*, are outcomes of leadership opportunities that are incorporated by many local programs as part of their menu of services. Positive social behaviors focus on areas that may include (20 CFR 664.430)

- Positive attitudinal development
- Self-esteem building
- Openness to working with individuals from diverse racial and ethnic backgrounds
- Maintaining healthy lifestyles, including being alcohol and drug free
- Maintaining positive relationships with responsible adults and peers, and contributing to the well being of one's community, including voting
- Maintaining a commitment to learning and academic success
- Avoiding delinquency
- Postponed and responsible parenting
- Positive job attitudes and work skills

### What Are Supportive Services?

**Supportive services** for youth may include but are not limited to (20 CFR 664.440)

- Linkages to community services
- Assistance with transportation
- Assistance with child care and dependent care
- Assistance with housing
- Referrals to medical services
- Assistance with uniforms or other appropriate work attire and work-related tool costs, including such items as eye glasses and protective eye gear

Local areas may have additional policy on the provision of supportive services.

### HOW LONG MUST FOLLOW-UP SERVICES BE PROVIDED?

Follow-up services must be provided for not less than 12 months after the completion of participation (WIA §129(c)(2)(I); 20 CFR 664.450(a)). However, local areas may provide follow-up services for a longer period. The types of services provided and the duration of services must be determined based on the needs of the individual.

Ideally, follow-up services should end when the youth has made a successful transition to further education or employment and has been able to remain in the placement over time. In practice, however, local area policy often determines when follow-up services end.

## WHO PROVIDES FOLLOW-UP SERVICES?

Local areas have three options on selecting a provider for follow-up services (ODJFS WIATL 20)

- Competitively select a vendor to provide follow-up services.
- Authorize the local area administrative entity to provide follow-up services through One-Stops.
- Use a mixed approach, providing follow-up services both internally and via competitive selection.

## WHEN DOES FOLLOW-UP BEGIN?

Follow-up formally begins upon completion of participation. Supportive services and case management activities do **not** extend participation, if they are the only services provided.

## TRANSITIONING FROM PARTICIPATION TO FOLLOW-UP SERVICES

Even though a participant has gotten a job or started postsecondary education or advanced training, the participant may not be ready for exit and follow-up services yet. Ideally, each youth should remain a program participant long enough to be stable in the job or postsecondary education. A good rule of thumb is that youth can be considered stable if they continue to be successful after

- 6-8 weeks on the job
- The second quarter or semester in postsecondary education or advanced training

In the meantime, during participation, case managers should provide career counseling services to ensure that the youth stays on the job or in school. Those career counseling services may include personal career counseling and workshops or other activities on

- Job retention
- Career advancement or promotion
- How to get along with bosses and co-workers
- Managing change for themselves and family members
- The importance of getting to work on time
- How to budget money

Those same career counseling services can and should also continue as follow-up services after exit.

## FOLLOW-UP SERVICES AND CASE MANAGEMENT

Case management does not extend participation.

Case management activities are administrative activities involving regular contact with youth, employers, and postsecondary academic advisors to obtain information on

- Employment status
- Educational progress
- Need for additional services
- Problems and challenges occurring and assistance needed to address them

The youth is not the only source of information about how things are going – the youth’s employer or postsecondary academic advisor is also a critical source. Regardless of who identifies a problem, specific assistance should be provided to help the youth address the problem. However, employers or academic advisors should only be contacted with the youth’s knowledge and permission.

Case management activities should continue during the entire follow-up period; as stated above, they have no effect on program participation status. Follow-up case management activities can be centralized, with a single entity providing all follow-up case management services. Or, follow-up services can be decentralized, with each service provider providing follow-up case management services for youth served at completion of participation.

### *Follow-Up Case Management*

#### **Centralized**

- Reduces duplication of effort
- Allows staff to specialize in areas of expertise
- Concentrates responsibility for case as a whole in a single entity

#### **Decentralized**

- Can minimize barriers for youth
  - Referrals to different people at different programs
  - Transportation to different places

## WHAT QUALIFIES AS FOLLOW-UP SERVICES?

An activity qualifies as follow-up services if the answer to this Key Question is, “Yes.”

### Key Question

*Are consistent, on-going activities maintained to ensure that the youth has a successful transition to work or further education?*

#### Effective Follow-Up Services

- Regular contact with appropriate frequency with
  - The youth
  - The youth’s employer\*
  - The youth’s postsecondary academic advisor\*
- Leadership development activities provided after completion of participation
- Supportive services provided after completion of participation
- Case management activities

\*With the youth’s knowledge and permission

#### Ineffective Follow-Up Services

- Follow-up activities that consist solely of occasional, ineffective contacts
- Quarterly phone calls to see if the youth is still working or still in school
  - Mailed surveys or letters to check if the youth is still working or still in school

#### Allowable Expenses

- Any expenses allowable under supportive services or leadership development
- Incentives intended to promote a youth’s continued participation in follow-up activities

**U.S. Department of Labor (USDOL) interpretation:** Any expense allowable during participation is also allowable during follow-up.

### WHO SHOULD RECEIVE FOLLOW-UP SERVICES?

Every youth participant must receive follow-up services for at least 12 months – longer, if allowed by local area policy.

### MEASURING SUCCESS OF FOLLOW-UP SERVICES

When measuring the success of follow-up services, two factors should be considered.

- **Outcomes** measure changes that occur in the participant as a result of program activities. Remaining employed and getting a promotion are examples of such a change.
- **Outputs** are evidence that service has been provided. Outputs help track the number of participants and the kinds of activities being provided.

#### *Examples of Outputs*

- Number of contacts per youth
- Number of follow-up activities offered
- Number of youth participating in follow-up activities

#### *Examples of Outcomes*

- Increase in wages
- Increase in length of time youth remain employed
- Increase in length of time youth remain in education or training
- Outcomes of other program elements such as leadership development or supportive services that demonstrate success during participation

# PART III

## *Effective Practices*

The purpose of follow-up services is to help ensure that each youth has a successful transition to employment or further education. WIA youth staff can use these practices to help ensure that successful transition.

- Incorporate follow-up services into the ISS at intake.
- Explain follow-up services to youth.
- Identify each youth's goals, needs, and personal situation.
- Develop a written follow-up services plan with each youth.
- Provide engaging follow-up activities to keep youth interested and connected.
- Provide frequent and regular follow-up activities.
- Develop and maintain a mentoring relationship with each youth.
- Coordinate follow-up activities with youth, employers, and academic advisors.
- End follow-up services appropriately.
- Track and document follow-up activities.

Follow-up is the last service that WIA youth will receive. To help ensure that follow-up services are effective, planning for it should begin at intake.

### ***Incorporate Follow-Up Services into the ISS at Intake***

- Describe possible follow-up services to youth during recruitment and intake.
- Include potential follow-up activities in the ISS.
  - Leadership development opportunities
  - Supportive services
  - Regular contact with youth's employer
  - Assistance in securing a better job, career development, further education
  - Work-related peer support groups
  - Adult mentoring
  - Tracking youth's progress
  - Development of work readiness skills
    - Transition skills (i.e., skills for the transition to independent living)
    - Job search skills
    - Job keeping skills and behaviors (promptness, conscientiousness, responsibility, etc.)
    - Interpersonal and communication skills
    - Information skills
    - Systems and technology skills
    - Thinking skills
    - Ethics and integrity
- Include career counseling activities that can begin during participation and continue during follow-up to ensure that the youth is stable in employment, postsecondary education, or advanced training.

Youth need to understand that follow-up is not just continued, unwarranted government intrusion in their lives; rather, follow-up provides continued assistance to each youth during the transition to independent adult living. Informing youth about the details and purpose of follow-up will help them understand the importance of and need for follow-up.

### ***Explain Follow-Up Services to Youth***

- Explain the nature, purpose, process, and details of follow-up services from beginning to end – what follow-up services are, how they help the youth, what activities they involve, and how those activities will occur.
- Don't use the word "exit." To youth, "exit" means "I'm done."
- Inform youth about specific kinds of services available during follow-up.
- Stress the importance of follow-up services and how they help youth in the job or educational program.
- Ensure youth are aware that follow-up services are not an intrusion into their lives but are designed to help the youth make a successful transition to employment, getting a promotion, or further education.
- Explain the roles of the follow-up case manager and the youth in follow-up.
- Assure youth of your interest in their progress.

Like any other services, follow-up services should be carefully based on each youth's goals, needs, and personal situation.

### **Identify Each Youth's Goals, Needs, and Personal Situation**

- Review existing case documentation on the youth.
  - ISS
  - Online case notes
  - Paper case files
- Review details of the youth's case with previous case managers.
- Gather and document additional personal information needed.
  - Contact information, including relatives and friends who may know how to reach the youth
  - Employment information
    - History
    - Contact information for current employer
    - Short-term and long-term employment goals
  - Educational information
    - Current school or college and contact information for the academic advisor
    - Short-term and long-term educational goals
  - Barriers to employment or school completion
    - Lack of social skills
    - Lack of occupational skills
    - Lack of work readiness skills
    - Lack of life skills
    - Need for supportive services
  - Need for career counseling activities begun during participation and continued during follow-up
  - Details about family and life situation
- Make an attempt to elicit information that the youth might be reluctant to give (substance abuse, domestic violence, homelessness, etc.).
- Update personal and contact information as necessary.

The numerous details involved in follow-up services customized to each youth's goals, needs, and personal situation should be recorded in an organized document that can be used to guide and monitor subsequent follow-up activities.

### *Develop a Written Follow-Up Services Plan with Each Youth*

- Start developing a plan several weeks prior to the youth's completion of participation.
- Ensure that the youth participates in all decisions about all details of follow-up services.
  - Services and activities
  - Schedule for services and activities
  - Responsibility for services and activities (i.e., youth, a follow-up case manager)
- Consider each aspect of the youth's goals, needs, and personal situation, including age, at-risk status, family and school experience, personal support systems, and schedule.
- Base planning on high expectations.
- Match follow-up services to each youth's goals, needs, and personal situation.
  - Leadership development and supportive service activities
  - Career counseling activities to be continued during follow-up
  - Regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise
  - Assistance in securing better paying jobs, career development, and further education
  - Work-related peer support groups
  - Adult mentoring
  - Any service allowable as an expense during participation
- Working with the youth, develop a written follow-up services plan that includes
  - Short-term and long-term employment and educational goals and action steps to attain them
    - School or advanced training programs that lead to nationally or state-recognized certificates
    - Jobs in a growing industry that provide a sufficient wage, benefits, and a career ladder
  - Plans for dealing with challenges at work or in school, including emergencies
  - Suitable supportive services (e.g., transportation) for work and school
  - Schedule of regular follow-up activities, including career counseling activities to be continued during follow-up
  - Signatures of both the youth and the follow-up case manager
- Determine youth's preferred methods for contact.
  - Home phone
  - Cell phone
  - Text message
  - Instant message (IM)
  - E-mail
  - Blogs
  - Online communities
  - Phone calls during or outside of business hours
  - Mail
  - Meetings or outings
  - Lunch or evening events
  - Visits to home, workplace, or school
- Link youth to each service and activity identified in the follow-up services plan.

**Local areas might want to create their own online community or blog.**

To ensure continued and substantive youth involvement in follow-up services for a year or more, it is important to keep youth interested and connected through engaging activities.

### ***Provide Engaging Follow-Up Activities to Keep Youth Interested and Connected***

- Involve youth in selecting follow-up activities.
- Provide meaningful individual and group activities that directly address issues and challenges that youth encounter in employment or education.
- Offer leadership development activities.
  - Youth serve as mentors for new program participants.
  - Youth participate in a volunteer community service project to apply new skills.
- Provide informal opportunities for youth to stay connected (e.g., drop-in room).
- Schedule team-building activities.
  - Conduct evening workshops, peer tutoring, discussion groups, support groups, and small group activities that will encourage youth to maintain contact.
  - Bring youth together to share their experiences, concerns, successes, and feelings about their transition to employment and further education.
  - Invite alumni to a reunion that a youth group can participate in or host.
- Consider activities that are fun for youth.
  - Participating in cultural, social, and recreational activities
  - Visiting the zoo or an art museum
  - Attending a baseball game
  - Having a group cookout
  - Introducing youth to a new sport
- Form a group of participants employed in related fields who can serve as a support network.
- Use discussion, role-playing, and communication to help youth learn how to
  - Work with diverse individuals
  - Handle challenging issues
- Hold career counseling workshops on the culture of work.
  - Career advancement and getting a promotion
  - Dressing appropriately
  - Communicating appropriately with employers and other workers
  - Managing anger
  - Resolving workplace conflict
  - Attending work consistently
  - Interacting with the supervisor
  - Dealing with office gossip
  - Knowing when, how, and why to quit a job
- Provide access to appropriate work attire for interviews or first day on job (for example, through a career resource clothing closet).

Even before follow-up, frequent and regular contacts are needed when youth start a job, postsecondary education, or advanced training. Contacts should be frequent at first and become less frequent as appropriate.

- Make contact daily for the first 5 days of employment or enrollment in college or a training class.
- Make contact once a week for the next 6 months.
- Make contact once a month after the first 6 months, unless a personal crisis requires intensive contact.

Frequent and regular activities also keep youth engaged during follow-up. In addition, frequent and regular activities are vital for follow-up case managers to monitor all factors that affect the youth's transition to employment or further education.

**A youth's first week on the job is critical. That is when so many quit or get fired.**

### ***Provide Frequent and Regular Follow-Up Activities***

- Make frequent and regular contacts if youth start a new job or postsecondary education or advanced training during follow-up. Contacts should be frequent at first and become less frequent as appropriate.
  - Make contact daily for the first 5 days of employment or enrollment in college or a training class.
  - Make contact once a week for the next 6 months.
  - Make contact once a month after the first 6 months, unless a personal crisis requires intensive contact.
- Schedule activities for the convenience of youth, including career counseling activities continued during follow-up.
- Make frequent contacts with each youth to discuss
  - Personal problems and potential barriers to success
  - Need for support services
  - Plans for advancement on the job
  - Possible referrals to advanced training or additional support services
  - Experiences in employment or further education
- Provide incentives for continued contact and achieving benchmarks.
  - Provide youth with clothing allowances and other small rewards for completing the program, for getting jobs, and for remaining employed.
  - When youth achieve benchmarks, give vouchers that can be used to help pay for specialized postsecondary training, post-placement training, and other services.
  - Provide points for the completion of program activities and training programs that youth can exchange for a stipend.
  - Provide formal recognition or certificates of achievement for reaching milestones such as 6 months of employment or skills upgrading.
- Maintain contact with the youth as planned.
- Ensure that assistance is available outside normal business hours in case of emergencies.

Maintaining contact, demonstrating interest in the youth, and helping to resolve issues as they arise allow follow-up case managers to form and maintain a mentoring relationship with each youth.

### ***Develop and Maintain a Mentoring Relationship with Each Youth***

- Involve youth in deciding on follow-up activities.
- Establish a relationship based on trust through regular and frequent interactions.
- Show a balance between compassion and practicality.
- Discuss personal problems or potential barriers to success that the youth is experiencing.
- Ensure confidentiality and demonstrate understanding, empathy, acceptance, and respect.
- Be attentive during contacts with youth and avoid passive listening.
- Take responsibility for keeping the relationship alive and active.
- Help youth cope with changes in the work environment that are upsetting, such as changes in supervision or the dismissal of a colleague.
- Help youth access services on their own to support emotional, physical, intellectual, and vocational needs to support job retention.
- Assist youth in identifying their own personal assets that can guide their work behavior.
- Help youth identify their own successes in resolving workplace challenges.
- Offer open-ended support over an extended period of time to help youth navigate the job market.
  - Case management
  - Continued career counseling and career development activities
  - Counseling on housing and domestic issues
  - Personal development
  - Interpersonal communication
  - Job retention

### **Youths' Right to Privacy of Educational Information**

- To allow access to personal educational information, each youth age 18 or over (or a parent of each youth age 14-17) must sign a waiver of privacy.
- The academic advisor should provide the educational institution's standard waiver form for signature by the youth or youth's parent, receive the signed waiver, and keep it on file.
- The academic advisor coordinates contact and information flow between instructors and follow-up case managers.

Follow-up case managers need to provide information and coordinate contacts and visits with youth, employers, and academic advisors to monitor each youth's progress and to ensure that each youth receives appropriate assistance in the workplace and in school.

### *Coordinate Follow-Up Activities with Youth, Employers, and Academic Advisors*

- Youth
  - Help youth address challenges themselves as they arise – don't just solve problems for youth.
  - If youth cannot solve challenges themselves, provide assistance as needed.
  - Inform youth about available employer-provided and school-provided services and assistance.
  - Advise youth of services and assistance available from other sources (e.g., community and faith-based organizations, public agencies, adult education programs, public libraries).
  - Inform youth about other WIA youth services and assistance available to address challenges.
  - Help youth complete paperwork required to obtain needed services and assistance.
  - Help youth see the connections between education and training and work.
  - Update youth contact information as necessary.
- Employers
  - Work with the employer to agree on a plan and schedule of contacts and visits.
  - Find out about employer-provided services and assistance available.
    - Tuition reimbursement, on-the-job training, other education and training options
    - Human resources processes like grievance procedures, conflict resolution, mediation
  - As appropriate, visit the job site and meet the employer or supervisor.
  - If possible, arrange to have another employee serve as mentor to the youth.
    - Help the youth adjust to challenges in the workplace.
    - Provide feedback on the youth's progress.
  - Update employer contact information as necessary.
- Academic advisors
  - Work with the academic advisor to agree on a plan and schedule of contacts and visits.
  - Find out about school-provided services and assistance available.
    - Financial assistance, remedial/developmental education, tutoring, career counseling, special programs
    - Academic advising, placement testing, counseling services
  - As appropriate, visit the school and meet the academic advisor.
  - If possible, arrange to have another student serve as mentor to the youth.
    - Help the youth adjust to challenges at school.
    - Provide feedback on the youth's progress.
  - Update academic advisor contact information as necessary.

At some point, follow-up services end. Just as follow-up services don't magically begin all by themselves, they should not just end in a vacuum.

### *End Follow-Up Services Appropriately*

- If a youth needs additional services under the program elements, follow-up case managers should keep in mind that
  - The youth can be re-enrolled and receive program element services.
  - The youth can receive the service without re-enrolling. According to USDOL interpretation, any expense allowable during participation is also allowable during follow-up.
- End WIA youth follow-up services at an appropriate time.
  - If possible, continue WIA youth follow-up services until the youth's transition is successful.
  - If necessary, end WIA youth follow-up services as required by state and local policy.
  - If the youth needs additional services beyond the required end of WIA youth follow-up services, refer the youth to other programs or partners as appropriate.
- Recognize successful transition.
  - The youth is still in the same job or educational program – hasn't been fired, hasn't quit, hasn't flunked out, hasn't dropped out.
  - The youth has completed an initial placement and successfully gone on to another placement – got a promotion, found a new job before quitting the old one, completed an associate degree and gone on for a bachelor's degree.
  - The youth does not have problems in employment or further education or the youth has learned how to solve problems as they arise.
  - The youth has attained the follow-up goals, interim steps, and benchmarks identified in the follow-up services plan.
- Mark the end of follow-up services.
  - Inform youth that they are always welcome to come back.
    - Return to the program for additional services or assistance if needed
    - Act as successful role models or mentors for other youth
  - Recognize and celebrate the youth's achievement.
    - A final business lunch
    - Graduation ceremony
    - Certificate of completion
    - Personal congratulations from the follow-up case manager and other youth
  - Inform youth about what to do if a problem arises in the future – who to contact and how and what kind of help to expect.

Each youth can be involved in far more follow-up activities than a follow-up case manager can remember. Follow-up case managers need to keep a record of each youth's activities as a history of the case.

### **Track and Document Follow-Up Activities**

- Set up a calendar and reminders for follow-up activities.
- Enter activities as Follow-Up Services in Sharing Career Opportunities and Training Information (SCOTI).
- Include start dates and end dates in SCOTI.
- Include appropriate notes in paper case file, for example
  - Identify supportive services provided during follow-up.
  - Identify leadership development opportunities provided during follow-up, including career counseling activities.
  - Justify incentives or stipends and describe the type of payment method and amount, if applicable.
  - Record contacts and meetings with the youth, the youth's employer, and the youth's academic advisor.
  - Keep a record of all follow-up activities planned or provided for each youth.
    - Dates, times, and purpose of contacts, meetings, activities
    - Topics discussed
    - Challenges and issues of special concern
    - Progress and accomplishments
    - Attainment of follow-up employment goals
      - Getting a job
      - Getting a promotion
      - Getting a raise
    - Attainment of follow-up educational goals
      - Completion of education or training program
      - Attainment of certificate (e.g., General Educational Development [GED], diploma, degree, occupational credential or license)
- Include other documentation as appropriate in paper case file, for example
  - Copy of all follow-up services plans
  - Copies of certificates of achievement
- Use performance data to improve follow-up services.
  - Are local-area goals for retention measures being met?
  - Are caseloads appropriate?
  - Are follow-up case managers and other youth staff meeting individual performance goals?
  - Do placements with individual employers and educational programs generally help youth make a successful transition to employment and further education?
  - If not, how could youth success be improved?
  - What barriers have youth typically been successful in overcoming?
  - What barriers have they not been successful in overcoming?
  - Do current follow-up practices and activities work well?
  - If not, how should current follow-up practices and activities be changed?

# Contracting for Follow-Up Services

## CONTRACTING OPTIONS FOR FOLLOW-UP SERVICES

### Contracting Specifically for Follow-Up Services

**Award a two-year contract to the same service provider.** The first year of the contract provides one or more of the 10 program elements, and the second year provides follow-up services to those youth who completed participation during the prior year's contract. A two-year contract should include a contingency clause providing for a second year based on satisfactory performance during the first year.

Note. While multiyear contracts are allowed, funds can only be disbursed for one state fiscal year at a time.

**Award a follow-up services contract to a separate service provider.** A challenge of this method is that it can disrupt the continuity of services for youth. Include in the youth services request for proposals (RFP) the expectation that service providers will work collaboratively with the follow-up case managers to maintain a continuum of service.

Contracting with a different provider for follow-up services can disrupt the continuity of services to the youth. It is critical to establish a working relationship between a new provider and the youth. Require a plan for making sure that the youth's case is handed off effectively.

- Involve the original case manager, the new follow-up case manager, and the youth in developing the follow-up plan.
- The original case manager should provide all relevant case information and case files to the new follow-up case manager.
  - Original objective assessment results
  - Current ISS, showing the youth's long-term and short-term employment and education goals, history of participation in WIA youth program activities, and outcomes of those activities
  - The youth's current placement in employment, postsecondary education, or advanced training
  - Career counseling activities begun during participation to be continued during follow-up
- Case information and case files can be shared in paper or electronically.
- Introduce the youth personally to the new follow-up case manager.
  - If possible, hold a face-to-face meeting with the youth and the new follow-up case manager.
  - If a face-to-face meeting is not possible, place a conference call with the youth and the new follow-up case manager.
  - If possible, escort the youth to the new follow-up case manager's location and office; if that is not possible, be sure the youth has the new case manager's name and address and an appointment for an initial meeting.

### Contracting for Follow-Up Services as a Performance-Based Contract

Create pay points for specific follow-up activities. Those pay points should include outputs during the contract and performance incentives for outcomes at the end of the contract. Increasing the value of the pay points over time creates an incentive for completing effective follow-up services. For example:

#### *Pay Points (Outputs) during Contract*

- The participant creates follow-up services plan and completes exit interview.
- The participant completes participation, and the first quarter of follow-up services based on the follow-up plan is completed and reported.
- The participant's second quarter of follow-up services based on the follow-up plan is completed and reported.
- The participant's third quarter of follow-up services based on the follow-up plan is completed and reported.

#### *Performance Incentives (Outcomes) at End of Contract*

- Six month's retention in employment
- Wage gain
- Retention in education or training program during the entire follow-up period
- Completion of education or training program

### Activities identified in the youth follow-up plan can include

- Peer support groups or work-related groups
- Parenting classes
- Financial education classes (budgeting, credit, etc.)
- Leadership training
- Personal career counseling
- Career development activities
- Community service activities
- Working with a career mentor
- Mentoring a younger person
- Recruiting for youth programs

**Follow-Up Services Contracting Do's and Don'ts****Do**

- Contract for follow-up services.
- Require a follow-up services plan for each participant.
- Provide incentives for service providers to conduct follow-up services.
- Tie reimbursements to tracking and reporting of follow-up services.
- Require providers to track and report follow-up activities.

**Don't**

- Assume follow-up services will just happen without a contract.
- Accept a monthly phone call placed to participants as a follow-up deliverable.
- Accept a single generic follow-up services plan as a deliverable.

## FOLLOW-UP SERVICES EMPLOYMENT PLAN

For youth who are employed, follow-up case managers can use this template to plan follow-up services matched to the individual youth's characteristics and needs, to record all details of planned follow-up services, and to monitor and document progress during follow-up services.

FOLLOW-UP SERVICES EMPLOYMENT PLAN		
Name		Follow-Up Case Manager
<b>CONTACT INFORMATION</b>		
Street Address		Apartment Number
City	State	Zip
Home Phone	Cell Phone	
E-mail		
Preferred Method of Contact		
<input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM)		
<input type="checkbox"/> E-mail <input type="checkbox"/> Home visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		
Who will know how to contact you if your contact information changes?		
Name _____		
Relationship _____		
Address _____		
Phone _____		

## FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)

EMPLOYER INFORMATION		
Employer		
Street Address		
City	State	Zip
Supervisor's Name	Supervisor's Phone	Supervisor's E-mail
Supervisor's preferred method of contact		
<input type="checkbox"/> Work site phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Work site visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		
EMPLOYMENT GOALS		
Why is getting and keeping a job important to you?		
<i>So I can be independent and get my own apartment.</i>		
Do you need additional help right now in order to		
<input type="checkbox"/> find or pay for transportation to work? <input type="checkbox"/> find or pay for child care? <input type="checkbox"/> pay for uniforms or tools you need for your job? <input type="checkbox"/> pay for your housing costs? <input type="checkbox"/> find or pay for medical or dental care?		
Is there any other assistance you need right now to be able to continue to work? Explain.		
<i>I'll need uniforms and protective eyegear.</i>		
How long do you want to work for your current employer?		
<i>Until I get a better job.</i>		
Do you know what opportunities for promotion exist in your current job? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, what are they?	If no, how can you find out?	
<i>Technician 2</i>		
Do you want to advance in your current job?		
<i>Yes, absolutely.</i>		
What's the next step up for someone in your position at work?		
<i>Technician 2</i>		

**FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)**

What would you need to do to be promoted to the next level? <i>Get national certification.</i>	
Where would you like to be one year from now? <i>In my own apartment.</i>	
What will you need to do in the next 6 months to reach your goal? <i>Finish training.</i>	
What can I do in the next 6 months to help you reach your goal? <i>Pay for certification exam.</i>	
In the next 3 months? <i>Continue training.</i>	
How can I help? <i>Don't know.</i>	
In the next month? <i>Start certification training.</i>	
How can I help? <i>Tell me where to get training and how to pay for it.</i>	
Do you need any additional training or education in order to reach your goal? If yes, what kind?	
<b>ADDITIONAL FOLLOW-UP SERVICES TO BE PROVIDED (BASED ON NEEDS AND GOALS)</b>	
Transportation	Uniforms/Tools <i>Yes, see above.</i>
Child Care	Further Education or Training <i>Yes, see above.</i>

**FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)**

OTHER OPPORTUNITIES		
<p>Other activities may be available. Would you be interested in</p> <p><input type="checkbox"/> Peer support groups or work-related groups?</p> <p><input type="checkbox"/> Parenting classes?</p> <p><input type="checkbox"/> Financial education classes (budgeting, credit, etc.)?</p> <p><input type="checkbox"/> Leadership training?</p> <p><input type="checkbox"/> Career development activities?</p> <p><input type="checkbox"/> Community service activities?</p> <p><input type="checkbox"/> Working with a career mentor?</p> <p><input type="checkbox"/> Mentoring a younger person?</p> <p><input type="checkbox"/> Recruiting for youth programs?</p>		
ADDITIONAL OPPORTUNITIES TO BE PROVIDED (BASED ON INTEREST)		
ACTIVITY	LOCATION/ORGANIZATION	DATE(S)

## FOLLOW-UP SERVICES EMPLOYMENT PLAN

Name		Follow-Up Case Manager	
<b>CONTACT INFORMATION</b>			
Street Address			Apartment Number
City	State	Zip	
Home Phone		Cell Phone	
E-mail			
Preferred Method of Contact			
<input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM)			
<input type="checkbox"/> E-mail <input type="checkbox"/> Home visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____			
Who will know how to contact you if your contact information changes?			
Name _____			
Relationship _____			
Address _____			
Phone _____			

**FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)**

EMPLOYER INFORMATION		
Employer		
Street Address		
City	State	Zip
Supervisor's Name	Supervisor's Phone	Supervisor's E-mail
Supervisor's preferred method of contact <input type="checkbox"/> Work site phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Work site visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		
EMPLOYMENT GOALS		
Why is getting and keeping a job important to you?		
Do you need additional help right now in order to <input type="checkbox"/> find or pay for transportation to work? <input type="checkbox"/> find or pay for child care? <input type="checkbox"/> pay for uniforms or tools you need for your job? <input type="checkbox"/> pay for your housing costs? <input type="checkbox"/> find or pay for medical or dental care?		
Is there any other assistance you need right now to be able to continue to work? Explain.		
How long do you want to work for your current employer?		
Do you know what opportunities for promotion exist in your current job? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, what are they?	If no, how can you find out?	
Do you want to advance in your current job?		
What's the next step up for someone in your position at work?		

**FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)**

What would you need to do to be promoted to the next level?	
Where would you like to be one year from now?	
What will you need to do in the next 6 months to reach your goal?	
What can I do in the next 6 months to help you reach your goal?	
In the next 3 months?	
How can I help?	
In the next month?	
How can I help?	
Do you need any additional training or education in order to reach your goal? If yes, what kind?	
<b>ADDITIONAL FOLLOW-UP SERVICES TO BE PROVIDED (BASED ON NEEDS AND GOALS)</b>	
Transportation	Uniforms/Tools
Child Care	Further Education or Training

**FOLLOW-UP SERVICES EMPLOYMENT PLAN (continued)**

**OTHER OPPORTUNITIES**

Other activities may be available. Would you be interested in

- Peer support groups or work-related groups?
- Parenting classes?
- Financial education classes (budgeting, credit, etc.)?
- Leadership training?
- Career development activities?
- Community service activities?
- Working with a career mentor?
- Mentoring a younger person?
- Recruiting for youth programs?

**ADDITIONAL OPPORTUNITIES TO BE PROVIDED (BASED ON INTEREST)**

ACTIVITY	LOCATION/ORGANIZATION	DATE(S)

## FOLLOW-UP SERVICES EDUCATIONAL PLAN

For youth who are in postsecondary education, follow-up case managers can use this template to plan follow-up services matched to the individual youth's characteristics and needs, to record all details of planned follow-up services, and to monitor and document progress during follow-up services.

FOLLOW-UP SERVICES EDUCATIONAL PLAN		
Name		Follow-Up Case Manager
CONTACT INFORMATION		
Street Address		Apartment Number
City	State	Zip
Home Phone	Cell Phone	
E-mail		
Preferred Method of Contact		
<input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Home visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		
Who will know how to contact you if your contact information changes?		
Name _____		
Relationship _____		
Address _____		
Phone _____		
EDUCATIONAL INFORMATION		
College or School		
Street Address		
City	State	Zip
Academic Advisor's Name	Academic Advisor's Phone	Academic Advisor's E-mail
Academic Advisor's Preferred Method of Contact		
<input type="checkbox"/> Office phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Office visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		

**FOLLOW-UP SERVICES EDUCATIONAL PLAN (continued)**

EDUCATIONAL GOALS	
<p>Why is getting further education important to you?</p> <p><i>I can't become an RN unless I get my associate degree.</i></p>	
<p>Do you need additional help right now in order to</p> <p> <input type="checkbox"/> find or pay for transportation to work?                          <input type="checkbox"/> find or pay for child care?                          <input type="checkbox"/> pay for books and other supplies for school?  <input type="checkbox"/> pay for your housing costs?                          <input type="checkbox"/> find or pay for medical or dental care?                 </p>	
<p>Is there any other assistance you need right now to be able to continue to attend school? Explain.</p> <p><i>Money for tuition.</i></p>	
<p>How long do you plan to attend school?</p> <p><i>At least until I get my associate degree and my state RN license.</i></p>	
<p>When you finish school, what kind of a job do you want?</p> <p><i>RN on the West Coast</i></p>	
<p>Where would you like to be one year from now?</p> <p><i>In school, halfway through my associate degree program.</i></p>	
<p>What will you need to do in the next 6 months to reach your goal?</p> <p><i>Pass all my courses in the first semester</i></p>	
<p>What can I do in the next 6 months to help you reach your goal?</p> <p><i>Help with tutoring and study skills</i></p>	
<p>In the next 3 months?</p> <p><i>Study and attend classes</i></p>	
<p>How can I help?</p> <p><i>Assistance with tuition and book money</i></p>	
<p>In the next month?</p> <p><i>Enroll at the community college</i></p>	
<p>How can I help?</p> <p><i>Where do I go? Who do I talk to?</i></p>	
ADDITIONAL FOLLOW-UP SERVICES TO BE PROVIDED (BASED ON NEEDS AND GOALS)	
Transportation	Books/Supplies <i>Money to pay for them.</i>
Child Care	Further Education or Training <i>Continue RN associate degree program; maybe bachelor's program in nursing</i>

**FOLLOW-UP SERVICES EDUCATIONAL PLAN (continued)**

**OTHER OPPORTUNITIES**

Other activities may be available. Would you be interested in

- Peer support groups or work-related groups?
- Parenting classes?
- Financial education classes (budgeting, credit, etc.)?
- Leadership training?
- Career development activities?
- Community service activities?
- Working with a career mentor?
- Mentoring a younger person?
- Recruiting for youth programs?

**ADDITIONAL OPPORTUNITIES TO BE PROVIDED (BASED ON INTEREST)**

ACTIVITY	LOCATION/ORGANIZATION	DATE(S)

## FOLLOW-UP SERVICES EDUCATIONAL PLAN

FOLLOW-UP SERVICES EDUCATIONAL PLAN		
Name	Follow-Up Case Manager	
<b>CONTACT INFORMATION</b>		
Street Address		Apartment Number
City	State	Zip
Home Phone	Cell Phone	
E-mail		
Preferred Method of Contact		
<input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Home visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		
Who will know how to contact you if your contact information changes?		
Name _____		
Relationship _____		
Address _____		
Phone _____		
<b>EDUCATIONAL INFORMATION</b>		
College or School		
Street Address		
City	State	Zip
Academic Advisor's Name	Academic Advisor's Phone	Academic Advisor's Email
Academic Advisor's Preferred Method of Contact		
<input type="checkbox"/> Office phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Text message <input type="checkbox"/> Instant message (IM) <input type="checkbox"/> E-mail <input type="checkbox"/> Office visit <input type="checkbox"/> Mail <input type="checkbox"/> Other _____		

**FOLLOW-UP SERVICES EDUCATIONAL PLAN (continued)**

EDUCATIONAL GOALS	
Why is getting further education important to you?	
Do you need additional help right now in order to	
<input type="checkbox"/> find or pay for transportation to work? <input type="checkbox"/> find or pay for child care? <input type="checkbox"/> pay for books and other supplies for school? <input type="checkbox"/> pay for your housing costs? <input type="checkbox"/> find or pay for medical or dental care?	
Is there any other assistance you need right now to be able to continue to attend school? Explain.	
How long do you plan to attend school?	
When you finish school, what kind of a job do you want?	
Where would you like to be one year from now?	
What will you need to do in the next 6 months to reach your goal?	
What can I do in the next 6 months to help you reach your goal?	
In the next 3 months?	
How can I help?	
In the next month?	
How can I help?	
ADDITIONAL FOLLOW-UP SERVICES TO BE PROVIDED (BASED ON NEEDS AND GOALS)	
Transportation	Books/Supplies
Child Care	Further Education or Training

**FOLLOW-UP SERVICES EDUCATIONAL PLAN (continued)**

**OTHER OPPORTUNITIES**

Other activities may be available. Would you be interested in

- Peer support groups or work-related groups?
- Parenting classes?
- Financial education classes (budgeting, credit, etc.)?
- Leadership training?
- Career development activities?
- Community service activities?
- Working with a career mentor?
- Mentoring a younger person?
- Recruiting for youth programs?

**ADDITIONAL OPPORTUNITIES TO BE PROVIDED (BASED ON INTEREST)**

ACTIVITY	LOCATION/ORGANIZATION	DATE(S)

## YOUTH PLAN

Follow-up case managers and youth can use this form to list the action steps the youth must take during follow-up services. Youth can then record progress and list additional action steps as they arise.

YOUTH PLAN			
Name			
ACTION STEP	SCHEDULED START	SCHEDULED END	PROGRESS
1. Find out from employer if uniforms, tools, or protective equipment needed for new job starting next week.	Today	Friday	Talked with employer Tuesday; protective eyeglasses required; no uniform or tools needed.
2. Talk to friend Joe about getting ride to new job starting next week.	Today	Friday	Talked with Joe Wednesday; ride arranged.
3. Get protective eyeglasses.	Tuesday	Friday	Appointment made for Thursday.
4. Meet with case manager, update.	Next week	Friday	Appointment made for Friday.
5.			
6.			

## YOUTH PLAN

YOUTH PLAN			
Name			
ACTION STEP	SCHEDULED START	SCHEDULED END	PROGRESS
1.			
2.			
3.			
4.			
5.			
6.			

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