

**Orange County Local Partnership Agreement**  
**Competitive Integrated Employment**  
**(CIE)**  
**Universal Referral Process**  
**DIRECTIONS**

The Orange County Local Partnership Agreement (OCLPA) will be utilizing an “Integrated Resource Team” (IRT) approach to determine needed services and supports of individuals with disabilities where there appears to be a need for multi-agency efforts in work-based learning and competitive integrated employment programming. The goal is to work together to create coordinated, well sequenced service delivery for individuals while optimizing the use of local partner resources.

The OCLPA Universal Referral Sheet will be used to promote coordinated service provision to support CIE. Before use and participation in the universal referral process, each agency will ensure compliance with “Release of Information” procedures for their own respective agency.

**Once service agency participants have been identified, the individual and family will be contacted to set up a Person-Driven Planning (PDP) Meeting. (Also known as Person Centered Planning (PCP).) This meeting will be scheduled when URP team members are prepared to discuss services and resources to support work training or employment for the individual.**

### **OCLPA Universal Referral Process Definition & Acronyms**

**The following acronyms and definitions may be help when using the Universal Referral Process:**

- **Competitive Integrated Employment (CIE)** – Full time or part time work at minimum wage or higher, with wages and benefits similar to those without disabilities performing the same work, and fully integrated with co-workers without disabilities.  
<https://www2.ed.gov/about/offices/list/osers/rsa/wioa/competitive-integrated-employment-faq.html>
- **DOR Student Services** – DOR Student Services consist of pre-employment transition services, provided in accordance with the needs and interests of the student, that fall within the following five categories: 1) Job exploration counseling 2) Work-based learning experiences 3) Postsecondary counseling 4) Work readiness training 5) Self-advocacy training.  
<http://www.dor.ca.gov/>
- **Individual Education Plan (IEP)** – The IEP creates an opportunity for teachers, parents, school administrators, related services personnel, and students (as appropriate) to work together to improve educational results for children with disabilities. The IEP is the plan for a quality education for each child with a disability. An IEP is more than just a written legal document. It’s a plan that lays out the instruction, supports and services students need to make progress and succeed in school.
- **Individual Employment Plan** - Development of an Individual Employment Plan through the One Stop Center is used to identify Individualized Career Services including: the employment goals, achievement objectives, and the combination of services for the participant to achieve his or her employment goals, including the list of, and information about, eligible training providers
- **Individual Plan for Employment (IPE)** - A term used by the California Department of Rehabilitation to refer to the contract between the client and the DOR. The IPE contains important information on the client’s employment goal, and what services and supports the DOR has agreed provide to assist the client in meeting that goal.
- **Individual Program Plan (IPP)** – Person-centered individual program planning assists persons with developmental disabilities and their families to build their capacities and capabilities. A team, including

individual, family and Regional Center Staff assists the individual in developing a description that includes: a preferred place to live, favorite people with whom to socialize, and preferred types of daily activities, including preferred jobs. This description is called a preferred future, and is based on the individual's strengths, capabilities, preferences, lifestyle and cultural background. The planning team decides what needs to be done, by whom, when, and how. The document known as the Individual Program Plan (IPP) is a record of the decisions made by the planning team.

- **Integrated Resource Team (IRT)** – The Orange County Local Partnership Agreement (OCLPA) will be utilizing an “Integrated Resource Team” (IRT) approach to determine needed services and supports of individuals with disabilities where there appears to be a need for multi-agency efforts in work-based learning and competitive integrated employment programming. This team will work together to create coordinated, well sequenced service delivery for individuals while optimizing the use of local partner resources.
- **Local Education Agency (LEA)** – May include a County Department of Education, a school district or another public educational organization.
- **One Stop Career Center/America’ Job Center (AJCC)**– Job/Career Centers located throughout California that provide access to the state’s employment-related services including skill assessment, assistance in searching for employment and training opportunities, job application preparation. The One Stops also facilitate integrated partnerships that seamlessly incorporate services for the common customers served by multiple program partners of the American Job Center.  
<http://www.americasjobcenter.ca.gov/>
- **Orange County Local Partnership Agreement (OCLPA)**- The purpose of the Orange County Local Partnership Agreement (OCLPA) is to enhance partnerships that promote preparation for and achievement of competitive integrated employment (CIE) for youth/adults, 14 years old through 30 years+, with disabilities and related “At Risk” populations including individuals with intellectual disabilities and developmental disabilities (ID/DD). The OCLPA includes partnerships that have been operational for over 15 years as well as new partners that have been established for a variety of workforce development programming opportunities.  
[http://www.chhs.ca.gov/Pages/Competitive-Integrated-Employment\(CIE\)-Local-Partnership-Agreements.aspx](http://www.chhs.ca.gov/Pages/Competitive-Integrated-Employment(CIE)-Local-Partnership-Agreements.aspx)
- **Person Driven Planning (PDP)/Person Centered Planning (PCP)**- This process is used to inform action that makes life better for people with disabilities and the people who know them & love them. This ongoing problem-solving process is used to help people with disabilities plan for their future. Groups of people focus on an individual and that person's vision of what they would like to do in the future.  
[http://www.catransitionalliance.org/docs/49-TranslatingPerson-DrivenPlanningintoSelf-DeterminedAction\\_1129201612737.pdf](http://www.catransitionalliance.org/docs/49-TranslatingPerson-DrivenPlanningintoSelf-DeterminedAction_1129201612737.pdf)
- **Potentially Eligible (PE)** – A PE eligible student has a disability, is 16 to 21 and who is eligible for and receiving IDEA services or is an individual with a disability for purposes of section 504. PE Students are eligible to receive the five DOR Pre-Employment Transition Services (Pre-ETS).
- **Pre-Employment Transition Services (Pre-ETS)** – DOR is mandated by the Workforce Innovation & Opportunity Act (WIOA) to provide the following five activities to students with disabilities (16 to 21-year-olds) who are eligible or potentially eligible for VR services: (1) job exploration counseling, (2) work-based learning opportunities, (3) counseling on post-secondary educational opportunities (4) workplace readiness training, & (5) instruction in self-advocacy, including instruction in person centered planning. DOR is authorized, but not required to provide the 9 authorized activities, specifically identified in the Act. These services may be provided to all students with disabilities regardless of whether an application for services has been submitted.  
<http://www.wintac.org/topic-areas/pre-employment-transition-services>
- **Regional Centers (RC)** – Nonprofit private corporations that contract with the Department of Developmental Services to provide or coordinate services and supports for individuals with developmental disabilities. They

have offices throughout California to provide a local resource to help find and access the many services available to individuals and their families. Regional centers provide diagnosis and assessment of eligibility and help plan, access, coordinate and monitor the services and supports that are needed because of a developmental disability. Regional Centers provide people with residential, day, transportation, and social, independent living, and respite, medical, psychological, preschool and other services.

<https://www.dds.ca.gov/RC/index.cfm>

- **Service Providers** – Community service providers approved by the individual Regional Centers to provide employment and independent living services for Regional Center participants.
- **Student Education Plan (SEP)** - Every student who enrolls in a Community College to pursue a certificate, degree, or transfer objective, and in many cases even those seeking career advancement, needs a Student Education Plan that represents the sequence of courses that can get them from their starting point to attainment of their educational goal.
- **Summary of Performance (SOP)** – When a student graduates from high school with a regular diploma or “ages out” of special education, IDEA requires the school to provide a “**summary** of academic achievement and functional **performance**.” The **Summary of Performance (SOP)** should include recommendations about ways to help meet post-secondary goals.  
<http://www.wrightslaw.com/info/trans.sop.htm>
- **Transition Services for Students with Disabilities who are also VR clients** – Transition services mean a coordinated set of activities for a student designed within an outcome-oriented process that promotes movement from school to post-school activities, including postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation. The coordinated set of activities must be based upon the individual student's needs, taking into account the student's preferences and interests, and must include instruction, community experiences, the development of employment and other post-school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation. Transition services must promote or facilitate the achievement of the employment outcome identified in the student's individualized plan for employment. (Authority: Section 7(37) and 103(a) (15) of the Act; 29 U.S.C. 705(37) and 723(a)(15))
- **Universal Referral Process (URP)** – The OCLPA Universal Referral Process will be used to coordinate needed services providers to plan for and implement multi-agency employment related services and supports. This effort includes working through a Person Driven Planning process with the individual and family
- **Universal Referral Sheet (URS)** - The OCLPA Universal Referral Sheet will be used to promote coordinated service provision to support CIE. Before use and participation in the universal referral process, each agency will ensure compliance with “Release of Information” procedures for their own respective agency.
- **VR (Vocational Rehabilitation)** – Vocational rehabilitation, at its core, is a set of services provided to individuals who suffer from mental or physical disorders, but who still have the ability and desire to learn and function productively. These services include education, job training and skills that will be needed to get and keep a job. Vocational rehabilitation services are sometimes offered to those who have undergone an injury, or who have endured a mental disorder to try and retrain them for work again. The services available through each state's vocational rehabilitation (VR) system can play a critical role in assisting people with disabilities to enter the work force.  
[http://www.rehab.cahwnet.gov/ \(PDP\)](http://www.rehab.cahwnet.gov/ (PDP))
- **Workforce Innovations Act (WIOA)** - WIOA was signed into law on July 22, 2014 and provides additional employment supports to individuals with disabilities. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. The landmark legislation is designed to strengthen and improve our nation’s public workforce system and help get Americans, including youth and those with significant barriers to employment, into high-quality jobs

and careers and help employers hire and retain skilled workers.

<http://www.help.senate.gov/imo/media/doc/WIOA%20One%20Page%20Summary%20May%202014.pdf>

## **SPECIFIC DIRECTIONS TO INITIATE THE INTEGRATED RESOURCES TEAM (IRT):**

(Any agency representative can initiate the URP Process.)

### **Lead IRT Staff:**

- 1) Contact “Individual” and family, if age 18 or over and not conserved, to discuss possible needs for work training and employment related services and supports. Share Integrated Resources Process Sheets and explain the purpose of this partnership effort. *Use or information in these forms do not constitute notice to the individual/families of changes or denials of benefits or services, and agencies must ensure that due process rights of individuals are followed in accordance with the law.*
- 2) Secure “Release of Information” permission from the individual who is interested in employment preparation, training, placement and retention support, utilizing protocol established by your agency/institution. ***This must include the “Due Process Rights” of the individual and family.***
- 3) Determine which agencies/institutions should be included in the IRT process.
- 4) Complete “Universal Referral Sheet” (URS)
- 5) Send via email the OCLPA URF Sheet to agencies who will be involved in the IRT Team planning.
- 6) Send an email to potential IRT Team members to identify a conference call/face-to-face meeting time & date.

### **IRT Agency Representatives:**

- 1) Respond to IRT Referral within 3 business days of receipt.
- 2) Indicate yes or no to the invitation. (If no, consider providing recommendation for other service agency involvement.)

### **IRT Team Responsibilities:**

- 1) Once partners are identified and releases received, the IRT will determine meeting time, method, and location. This may include the use of conference calling. This meeting is used to provide information to all potential service providers and prepare for active participation in the PDP Meeting with individual & family member.
- 2) IRT Team Members agree to participate in a Person-Driven Planning (PDP) Meeting with individual and parent/family members.
- 3) Lead IRT Staff will contact individual and family member with permission, if age 18 or over and not conserved, to set up the PDP Meeting.
  - ✓ Identify date, time and location
  - ✓ Provide meeting information to all IRT Members
  - 4) Hold the PDP Meeting to discuss CIE/employment related needs of the individual including:
    - ✓ Utilize OCLPA (One Page) Person Driven Plan Sheet to identify work training & employment specifics for the individual, including:
      - Skills to bring to the workplace
      - Interests, hopes and dreams as individual trains, learns & prepares for a job & career
      - Supports & accommodations needed in the workplace and/or work training classes
    - ✓ Utilize OCLPA CIE Services Provision Sheet to identify service needs, resources and agency(ies) to provide employment/work training. This form is to be used to identify CIE Services and Supports needed for an individual with a disability who needs coordinated multi-agency programming.
- 5) At the PDP Meeting, identify a lead agency representative to call additional meetings, and request updates, as needed.
- 6) Determine communication methods to keep all team members updated on service provision, progress and employment related outcomes.

- 7) Each agency will provide, at least quarterly, updates on employment related service provision to all IRT Members, or more often as determined by each individual agency.
- 8) Individual and family member must be consulted for change in service provision to ensure ongoing buy-in and permission.
- 9) *Failure to use the Universal Referral Process or receive the **Universal Referral Sheet will not be used by agencies as a barrier or denial of services to the individual. This process should not be basis for the individual to be denied or delayed services that they are otherwise eligible to apply for and/or receive.***

## **COORDINATING PERSON CENTERED/DRIVEN PLANNING:**

**Person Directed Planning (PDP)** is an ongoing problem-solving process used to help people with disabilities plan for their future. In PDP, groups of people focus on an individual and that person's vision of what they would like to do in the future. This "person-Directed" team meets to identify opportunities for the student to develop personal relationships, participate in their community, increase control over their own lives, and develop the skills and abilities needed to achieve these goals. PDP depends on the commitment of a team of individuals who care about the student. These individuals take action to make sure that the strategies discussed in planning meetings are implemented.

To ensure effective implementation of the following plans: IPE, IEP, IPP, SSP and others, as appropriate, agencies will work together to ensure coordinated service provision for the individual. The IRT will review plans to determine:

- Review of current CIE Services
- Identify needed CIE Services
- Determine which agency is most appropriate to provide needed services

**Coordination of services across agencies will promote improved communication among individual, family and service agencies to ensure effective, cost efficient and quality services to promote competitive integrated employment.**

## **Workforce Development Legislation**

In looking at possible services and resources for individuals with disabilities, it is important to be mindful of specific workforce development legislation, regulations, policies and implementation procedures. Key legislation includes the following:

### **Employment First Policy:**

Signed into law on October 9, 2013 by Governor Edmund G. Brown, The Lanterman Act, Section 4869(a)(1) states, "It is the policy of the state that opportunities for integrated, competitive employment shall be given the highest priority for working age individuals with developmental disabilities, regardless of the severity of their disabilities. "It is now California's highest priority to make integrated competitive employment a real choice for people with developmental disabilities. Integrated competitive employment is a job at a workplace among individuals with and without disabilities. It will be a full or part-time position at or above minimum wage.

### **Workforce Innovations & Opportunities Act:**

WIOA is landmark legislation that is designed to strengthen and improve our nation's public workforce system and help get Americans, including youth and those with significant barriers to employment, into high-quality jobs and careers and help employers hire and retain skilled workers. This legislation was signed into law on July 22, 2014. This legislation addresses programming offered through the American Job Center/One Stop Center and Department of Rehabilitation.

## 1) American Job Center (AJC) Improves Services to Individuals with Disabilities:

WIOA increases individuals with disabilities' access to high quality workforce services and prepares them for competitive integrated employment. AJCs will provide physical and programmatic accessibility to employment and training services for individuals with disabilities.

## 2) Department of Rehabilitation

State vocational rehabilitation agencies will set aside at least 15 percent of their funding to provide transition services to youth with disabilities. Youth with disabilities will receive extensive pre-employment transition services so they can successfully obtain competitive integrated employment.

Keep in mind that under the WIOA Legislation there are two types of services offered through the Department of Rehabilitation:

### • Pre-Employment Transition Services:

Pre-Employment Transition Services (Pre-ETS) – DOR is mandated by the Workforce Innovation & Opportunity Act (WIOA) to provide the following five activities to students with disabilities (16 to 21-year-olds) who are eligible or potentially eligible for VR services: (1) job exploration counseling, (2) work-based learning opportunities, (3) counseling on post-secondary educational opportunities (4) workplace readiness training, & (5) instruction in self-advocacy, including instruction in person centered planning. DOR is authorized, but not required to provide the 9 authorized activities, specifically identified in the Act. These services may be provided to all students with disabilities regardless of whether an application for services has been submitted. For more information, go to:

<http://www.wintac.org/topic-areas/pre-employment-transition-services>

### • Vocational Rehabilitation Services:

VR (Vocational Rehabilitation) – Vocational rehabilitation, at its core, is a set of services provided to individuals who suffer from mental or physical disorders, but who still have the ability and desire to learn and function productively. These services include education, job training and skills that will be needed to get and keep a job. Vocational rehabilitation services are sometimes offered to those who have undergone an injury, or who have endured a mental disorder to try and retrain them for work again. The services available through each state's vocational rehabilitation (VR) system can play a critical role in assisting people with disabilities to enter the work force. For more information, go to:

<http://www.rehab.cahwnet.gov/>

## NEEDED/REQUESTED SERVICE(S):

(Please check all that apply.) Agency reps will work together as an “Integrated Resource Team” to determine which services are needed and which agency will provide each specific service.

EMPLOYMENT RELATED SERVICES		
<input type="checkbox"/> Assessment/Testing	<input type="checkbox"/> Vocational Training/Certification	<input type="checkbox"/> Counseling & Guidance
<input type="checkbox"/> Basic Skills or GED	<input type="checkbox"/> Work Readiness Training	<input type="checkbox"/> Tutoring
<input type="checkbox"/> Clothing Assistance	<input type="checkbox"/> Job Search Assistance	<input type="checkbox"/> Mentoring
<input type="checkbox"/> On the Job Training (OJT)	<input type="checkbox"/> Pre-Employment Transition Services/Pre-ETS/DOR Services	<input type="checkbox"/> Transportation/Travel Training
<input type="checkbox"/> High School Diploma Completion	<input type="checkbox"/> WIOA Youth Employment Program	<input type="checkbox"/> Post-Employment Services/ Job Retention Support
<input type="checkbox"/> Job Coaching	<input type="checkbox"/> Assistive Technology/Devices	<input type="checkbox"/> Occupational Licensing
<input type="checkbox"/> Apprenticeship	<input type="checkbox"/> Veteran Services	<input type="checkbox"/> Dislocated Workers
<input type="checkbox"/> Training Books & Supplies	<input type="checkbox"/> Supported Employment Services	<input type="checkbox"/> Housing Assistance
<input type="checkbox"/> Tools & Equipment for Job	<input type="checkbox"/> Benefits Planning & Management	<input type="checkbox"/> Family Services

For each needed service and/or resource, the service will be identified with a corresponding service provider or agency.



## COMPLETING THE OCLPA CIE UNIVERSAL REFERRAL SHEET:

Coordinated service provision is essential to ensuring effective work training and employment preparation for individuals with a wide range of disabilities, including those with intellectual and developmental disabilities. The following Universal Referral Process Sheet should be used to bring community service providers together to identify resources and services that may be needed to promote CIE for the individual. It will be used in support of the PDP efforts that include the individual and family.

### Orange County Local Partnership Agreement Competitive Integrated Employment Universal Referral Process Sheet

Date of Referral: _____		Individual: _____	Age: _____
Phone #: _____		E-Mail: _____	
Parent/Guardian Name: _____			
Phone #: _____		E-Mail: _____	
Referring Agency: _____		Phone #: _____	
Referring Staff Name: _____		E-Mail: _____	

(Please see OCLPA Universal Referral Process Directions Sheet.)

Please circle Yes/No for service agencies (1-6). Indicate specific program/school name and include contact name if known. Additionally, circle Yes for agencies referring to:

CURRENT & POTENTIAL EMPLOYMENT RELATED SERVICE AGENCIES	
Directions: Under each agency/organization, please indicate the current status of the individual/client, circle Yes or No. Additionally, include location/site and a contact person for the agency /institution. For potential referrals, please circle Yes and include notations as applicable.	
<b>1. DEPARTMENT OF REHABILITATION</b>	
CURRENT: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Rehabilitation Counselor/QRP:	
<b>2. REGIONAL CENTER</b>	
Current: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Service Coordinator:	
<b>3. SECONDARY/POST SECONDARY SETTING</b>	
Current: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Education Contact:	
<b>4. ONE-STOP CENTER/ AMERICAN JOB CENTER (AJCC)</b>	
Current: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Staff Contact:	
<b>5. SERVICE PROVIDER</b>	
Current: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Staff Contact:	
<b>6. OTHER AGENCY OR SERVICE PROVIDER</b>	
Current: Yes/No	Potential Referral: Yes
Office/location:	Notes:
Staff Contact:	

**Please include previous and/or needed details relevant to work training, employment and other services needed to promote success in the workforce development process:**

☐ Work Training Services *(Explanation)* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

☐ Employment Services *(Explanation)* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

☐ Other Support Services *(Explanation)* \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**COMMENTS:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

*Please attach resume, if available.*

*(Referring Agency, please attach any additional assessment or relevant information on the client. Each Agency is responsible for following "Release of Information" procedures for your own agency.)*

7-24-18

This 2-sided Sheet may be used once the **“Release of Information”** requirements from your agency have been met.

**Identification Box:**

Include date of referral from your agency and specific information for the individual being referred. The age range is important to include because some services are age dependent. Also include referring agency, staff and contact information.

**Current & Potential Employment Related Service Agencies:**

Indicate agencies the individual is currently receiving services from. In addition, indicate agencies that may have services/resource needed to promote successful job placement and retention.

**Work Training & Employment Services Section:**

Please explain the types of employment services that the individual needs.

**Comments Section:**

Include any additional information pertinent to the identification and provision of CIE related services.

**OCLPA CIE SERVICES SHEET:**

This Sheet is to be used to identify CIE Services and Supports needed to provide and support CIE for an individual with a disability who needs coordinated multi-agency programming. ***The IRT Team will complete Sheet together at the PDP Meeting with the Individual and Family Member.***



## OCLPA COMPETITIVE INTEGRATED EMPLOYMENT (CIE) SERVICES SHEET:

This form is to be used to identify CIE Services and Supports needed to provide and support CIE for an individual with a disability who needs coordinated multi-agency programming. The Integrated Resource Team (IRT) Team will complete this sheet together to indicate CIE Services, multi-agency identification, contact information and timelines as follows:

Individual: \_\_\_\_\_

Service Agencies: (Check All that apply and indicate other.

☐ Department of Rehabilitation ☐ Regional Center of Orange County ☐ Education Agency: \_\_\_\_\_

☐ One Stop: \_\_\_\_\_ ☐ Service Provider: \_\_\_\_\_ ☐ Other: \_\_\_\_\_

CIE SERVICE NEEDS	RESOURCES/SERVICES	AGENCY/SERVICE PROVIDER & CONTACT INFORMATION	TIMELINE
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

## INTEGRATED RESOURCE TEAM (IRT) FOLLOW-UP REVIEW OF OCLPA CIE SERVICES PROVISION:

A timeline will be identified for IRT reconvening, to review individuals CIE Training, placement and job retention. It is recommended that a review of services be conducted on at least a quarterly basis. ***If there needs to be a change in services, the individual and family, with permission from individual 18 and older or individual conserved, must be included in the discussion and approval.***

## SUMMARY OF PERFORMANCE (SOP):

When students with disabilities graduate from high school with a regular diploma or “age out” of special education, IDEA requires the school to provide a “summary of academic achievement and functional performance.” The Summary of Performance (SOP) should include recommendations about ways to help meet post-secondary goals. The requirements for the SOP are found in the Federal Regulations at 34 CFR §300.305(e)(3).

The SOP **must** be completed during the final year of a student’s high school education and is most useful when completed during the transition IEP process when the student has the opportunity to actively participate in the development of this document. The document should contain the most updated information on the performance of the student and include both the student’s abilities and aspirations. The SOP is very closely tied to information contained in the IEP, it should be a separate document which condenses and organizes the key information that should follow the student. <http://www.wrightslaw.com/info/trans.sop.htm>

It is recommended by the California Department of Education, Department of Rehabilitation and Department of Developmental Services that efforts by the Local Partnership Agreement Groups include utilizing a Universal Referral Process as part of the SOP requirement.

**URP #2 (10-2-18)**