Orange County Local Partnership Agreement
Competitive Integrated Employment
(CIE)
Universal Referral Process
DIRECTIONS (8-26-21)

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. Please see the **(OCLPA URP Flow Chart #1)**.

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.

SPECIFIC DIRECTIONS TO INITIATE THE INTEGRATED RESOURCES TEAM (IRT) Universal Referral Process:

(Any agency representative can initiate the URP Process.)

Lead IRT Staff:
1) Contact the Individual/Student with a disability and family member or other representative, to discuss possible needs for work training and employment related services and supports. The individual/student with a disability may invite any people who are or may be involved in providing support as they go through the transition process. Where the individual is conserved, please contact the conservator first before addressing this process with the individual/student with a disability.

    Share Integrated Resources Process Sheets and explain the purpose of this partnership effort. Use of 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 Process Sheet" **(OCLPA URP Sheet #3)**

5) Send via fax/email the OCLPA URP Sheet #3 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 or other representative, as appropriate.
2) IRT Team Members agree to participate in a Person-Driven Planning (PDP) Meeting with individual and family member or other representative, as appropriate.
3) Lead IRT Staff will contact individual and family member or other representative, as appropriate, 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:
       - o Skills to bring to the workplace
       - o Interests, hopes and dreams as individual trains, learns & prepares for a job & career
       - o 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, family member or other representative, as appropriate, must be consulted for change in service provision to ensure ongoing buy-in and agreement.
9) *Failure to use the Universal Referral Process or receive the **Universal Referral Process 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 supportive process used to help people with disabilities plan for and make decisions about 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. You may want to use the **(OCLPA CIE PDP #5)**.

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 or other representative and service agencies to ensure effective, cost efficient and quality services to promote competitive integrated employment.

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		
☐ Assessment/Testing	☐ Vocational Training/Certification	☐ Counseling & Guidance
☐ Basic Skills or GED	☐ Work Readiness Training	☐ Tutoring
☐ Clothing Assistance	☐ Job Search Assistance	☐ Mentoring
☐ On the Job Training (OJT)	☐ Pre-Employment Transition Services/Pre-ETS/DOR Services	☐ Transportation/Travel Training
☐ High School Diploma Completion	☐ WIOA Youth Employment Program	☐ Post-Employment Services/ Job Retention Support
☐ Job Coaching	☐ Assistive Technology/Devices	☐ Occupational Licensing
☐ Apprenticeship	☐ Veteran Services	☐ Dislocated Workers
☐ Training Books & Supplies	☐ Supported Employment Services	☐ Housing Assistance
☐ Tools & Equipment for Job	☐ Benefits Planning & Management	☐ 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 **(OCLPA URP #3)** 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, family or representative, as appropriate.

Orange County Local Partnership Agreement
Competitive Integrated Employment
Universal Referral Tool

Date of Referral: _____   Individual: _____   DOB: _____

Phone #: _____   E-Mail: _____

Parent/Conservator Name: _____

Phone #: _____   E-Mail: _____

Referring Agency: _____   Phone #: _____

Referring Staff Name: _____   E-Mail: _____

URP Designated Point of Contact: _____   Agency: _____

CURRENT & POTENTIAL
EMPLOYMENT RELATED SERVICE AGENCIES

Directions: Under each agency/organization 1-6, please indicate the current status of the individual/client, circle Yes or No. Additionally, include location/site and a contact person for the agency. For potential referrals, please circle Yes and include notations as applicable. When identified, please include the Agency Representative who will be working with the URP Team and the date contacted.

1. DEPARTMENT OF REHABILITATION		Agency Representative	Date Contacted
CURRENT: Yes/No	Potential Referral: Yes		
Office/location:	Notes:		
Rehabilitation Counselor/QRP:			
2. REGIONAL CENTER			
Current: Yes/No	Potential Referral: Yes		
Office/location:	Notes:		
Service Coordinator:			
3. SECONDARY/POST SECONDARY SETTING:			
Current: Yes/No	Potential Referral: Yes		
Office/location:	Notes:		
Education Contact:			
4. ONE-STOP CENTER/ AMERICAN JOB CENTER (AJCC)			
Current: Yes/No	Potential Referral: Yes		
Office/location:	Notes:		
Staff Contact:			
5. SERVICE PROVIDER:			
Current: Yes/No	Potential Referral: Yes		
Office/location:	Notes:		
Staff Contact:			
6. OTHER AGENCY OR SERVICE PROVIDER:			
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.)

URP # 3 (6-8-19)

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 DOB 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 preparation, placement and retention. Please add the name of the contact person and the date of referral. Indicate specific service provider and/or additional agency.

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:

The **(OCLPA URP #4 CIE Services 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 this sheet together at the PDP Meeting with the Individual, Family Member or representative, as appropriate.***

OCLPA COMPETITIVE INTEGRATED EMPLOYMENT (CIE) SERVICES SHEET:

This form is to be used to identify appropriate services & supports needed to promote CIE for an individual with a disability who needs coordinated multi-agency programming. The Integrated Resource Team (IRT) will complete this sheet together to indicate CIE Services, multi-agency identification, contact information and timelines.

Individual: _____ Date: _____ Service Agencies: (Check All that apply and indicate other.)

☐ Department of Rehabilitation:_____ ☐ Regional Center of Orange County ☐ District:_____/School: _____

☐ Community College: _____ ☐ One Stop: _____ ☐ Service Provider: _____ ☐ Other:_____

CIE SERVICE NEEDS	RESOURCES/SERVICES (Provided to the individual to support CIE)	AGENCY/SERVICE PROVIDER	RESPONSIBLE PERSON (Include contact information)	TIMELINE (Start & Estimated Completion Date)	EXPECTED OUTCOMES (Related to job placement, monitoring & retention)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

URP #4 (6-8-19)

Integrated Resource Team (IRT) Follow-up Review of OCLPA CIE Services Provision:

A timeline has been 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, family or representative, as appropriate, must be included in the discussion and approval.***

URP Survey:

At least one representative from each URP Pilot site should complete the **(OCLPA URP Qualtrics Survey #7).** In addition, please provide the individual with disability, family member, or representative involved in the URP Process a **(OCLPA URP Survey #7b)** twice per year. All completed surveys should be returned to Chapman University Thompson Policy Institute through the following email process…

E-Mail/Letter Content to be sent to…

URP Participants (IWD, Families, Educators & Staff)

Date…

Add your greeting…

Body of the e-mail…

You are receiving this email because you have taken part in the Universal Referral Process – as an individual, family member, educator, or service provider. Orange County Local Partnership Agreement (OCLPA) is requesting that you complete a brief survey as part of a research study to provide feedback on your experience with the Universal Referral Process. The feedback will help OCLPA strengthen the referral process for both clients and service providers. While the questionnaire is anonymous, you will have the opportunity to provide your contact information at the end of the survey. Please fill out the contact form at the end of the survey, if you would like to provide more detailed feedback regarding your experience.

Participating in the survey is voluntary. Taking the survey means that (1) you have read and understand the OCLPA Universal Referral Process Survey informed consent form attached to this email, (2) you have decided to be in the research study. You may print out a copy of the consent form to keep.

Please click on the link below to take the Universal Referral Process survey:

Select one of the following…

- **Providers and Educations:**
  https://chapmanu.co1.qualtrics.com/jfe/form/SV_5ign5StmyVYkapv

- **Individuals & Families:**
  https://chapmanu.co1.qualtrics.com/jfe/form/SV_cMFe7e5HpMITSEI

Thank you for your help with piloting the Orange County Local Partnership Agreement (OCLPA) Universal Referral Process (URP).

Salutation…

URP #2a 8-26-21