

## Orange County Business Intermediary (OCBPI) Project Narrative Final Report 2/3/23-1/31/24

The Orange County Business Partner Intermediary (OCBPI) Project is an innovative strategy to organize Orange County’s business partner resources to successfully serve Individuals with Developmental Disabilities (IDD), businesses, families, educators, and service providers. This concept has been endorsed by the Orange County Local Partnership Agreement (OCLPA) Steering Committee, to design a Transformation Action Plan (TAP) to promote Competitive Integrated employment (CIE). [Seventeen OCBPI Documents](#) have been included as part of this Final Report which includes the completed TAP.

- [Final Report \(F.R.\) Attachment #1: OCBPI Transformation Action Plan](#)

### #1 OCBPI ACTIVITY: DESIGN THE OCBPI STRATEGY TO PROMOTE CIE

- **In this 1-Year Project, we have worked on a county-wide process to provide a strategic methodology to identify Competitive Integrated Employment (CIE) opportunities for Individuals with (IDD), as well as supporting businesses in hiring and retaining youth and adults with a wide range of disabilities who are clients of the Regional Center. Specifics include the following:**
  - [Final Report \(F.R.\) Attachment #2: OCBPI Training & Technical Assistance Chart](#)
- **Utilized community partnerships to address the CIE needs of the OC community, including Chapman University Thompson Policy Institute on Disability and SDSU Interwork Institute, NeuroTalent Works, grit & flow, Saddleback Valley Unified School District, North Orange Continuing Education, and Goodwill of Orange County.**
- **Utilized the OCBPI Training & Technical Assistance Chart to promote and track the development of CIE strategies for all stakeholders (business partners, families, K-12 & ATP Educators, PSE Educators, and Business Partners)**
  - [Final Report \(F.R.\) Attachment #2: OCBPI Training & Technical Assistance Chart](#)  
Training & Technical Assistance efforts have been scheduled & provided through 1/31/2024, please see the chart for specifics.
- **Developed and updated the OCBPI Products & Materials Chart to address CIE programming efforts for all stakeholders (business partners, families, K-12 & ATP Educators, PSE Educators, and Business Partners)**
  - [F.R. Attachment #3: OCBPI Products & Materials Chart](#)  
OCBPI Work Teams have developed and vetted CIE Products as identified in this chart. These products have been organized into an OCBPI Tool Kit that includes **(41)** files:

|                              |                                   |                         |
|------------------------------|-----------------------------------|-------------------------|
| Accommodations               | Apprenticeships                   | ASD                     |
| Benefits Planning            | Business Advisory Committee       | Business Intermediaries |
| Business Partners            | Career Pathways                   | Chamber of Commerce     |
| Collaboration & Partnerships | Competitive Integrated Employment | Customized Employment   |
| Data Collection              | Department of Rehabilitation      | Families                |
| Financial Planning           | Health Care                       | Independent Living      |

|                                 |   |  |
|---------------------------------|---|--|
| Individualized Planning         | Individuals with Developmental Disabilities | Job & WBL Development                      |
| Job Coaching & Natural Supports | K-12 ATP Programs                           | Mental Health Supports                     |
| Mobility Training               | Orange County Local Partnership Agreement   | Orange County Transition Initiative (OCTI) |
| Paid Internship Programs        | Person Driven Planning                      | Post Secondary Education                   |
| Pre-Employment Training         | Project SEARCH                              | Regional Center                            |
| Self-Advocacy                   | Sustainability & Replication                | Technology                                 |
| Transition Planning             | Transportation                              | Universal Referral Process                 |
| Volunteering                    | Work-Based Learning                         |  |

**This Tool Kit is available on the following Google Drive...**

<https://drive.google.com/drive/folders/1IWI0mxt7LXAsD9cxvAWwtjWP7RP6ZK7V?u>

This tool kit includes over **(400)** CIE Relevant documents.

- **Continue with discussions on the OCBPI Sustainability Plan with the OCBPI Planning Committee**
  - OCBPI Meeting 1/25/24 Agendas for the entire year are available upon request.
  - Continued work on the development of an Implementation & Replication Plan. The OCBPI Team has named the Plan the “California Business Partner Intermediary Project” (CABPI). (This project, when funded, will be implemented first in the OC and then throughout California.) All sustainability and replication materials are included in the OCBPI Tool Kit. All OCBPI Team Members have agreed to continue with the planning process and will meet on Zoom a minimum of once per month, starting on 2/26/24. The lack of funding will slow down the process, but we are resolved to continue the search for funding.

## **#2 OCBPI ACTIVITY: BUSINESS INTERMEDIARY PROCESS DEVELOPMENT**

The North OC and South OC Business Partner Intermediary (OCBPI) are working with small, medium, and large businesses to identify methods that will assist their respective businesses to enhance their workforce through training and support in designing needed accommodations for IDD. The OCBPIs work with the Team Leads representing OC schools, community colleges, and adult service providers to design collaborative methodologies to increase & improve access to jobs, career pathway training, and promotional opportunities. Specific planning efforts included discussions surrounding the following:

- **Meetings with OCBPI Partners to align on OCBPI scope, objectives, and plans.**
- **North & South Business Intermediary Staff met to identify the next steps, questions/clarifications, and CIE Products developed and working on.**
  - Workshop conducted to define the scope and identify challenges of collaboration/partnership between OCBPI stakeholders
  - Workshop conducted to identify target participants for OCBPI Proof of Concept Pilot - identifying the largest population of participants served by OCBPI stakeholders to create a BPI model for collaboration towards job placement and support

- Developed the OCBPI Proof of Concept Model/Proposal - what the BPI model would be and how we would implement the model. The **OCBPI Business Intermediary Process can be seen in F.R. Attachment #5**
- The OCBPI Leadership Team met in person on 1/25/24 to discuss, develop and approve the **OCBPI Systems Chart F.R. Attachment #4**. In addition, the **OCBPI Business Intermediary Process seen in F.R. Attachment #5** was approved and is detailed as part of the **OCBPI Transformation Action Plan in F.R. Attachment #1**.

### #3 OCBPI ACTIVITY: DEVELOP TRANSFORMATION ACTION PLAN

We have completed the **OCBPI Transformation Action Plan (TAP)** that will set the course for effective and efficient use of Orange County business partnerships to ensure work site training and CIE opportunities for persons served by the Regional Center for years to come, with leadership provided by the Chapman University Thompson Policy Institute. **Please find the TAP Documents in the following Google Drive...**

<https://drive.google.com/drive/folders/1Fx-7k2Q1HHMiDGYBlp4NDckRDIEAISlc?u>

The **OCBPI Transformation Action Plan** has been developed and approved. It lays out planning efforts over the last year.

- **F.R. Attachment #1: OCBPI Transformative Action Plan (TAP) Specific documents included in the TAP are as follows:**

|     |  |     |  |
|-----|--|-----|--|
| #1  | OCBPI Transformation Action Plan                 | #2  | OCBPI Training & Technical Assistance Chart                                    |
| #3  | OCBPI Products & Materials Chart                 | #4  | OCBPI Systems Chart  |
| #5  | OCBPI Business Intermediary Process              | #6  | OC Work-Based Learning Document #1: OC Pre-Employment Skills Development Chart |
| #7  | OCWBL #2: OC Employment Skills Development Chart | #8  | OCWBL #3: Employment Rating Referral Summary Chart                             |
| #9  | CIE Glossary                                     | #10 | OCBPI CIE Guide  |
| #11 | The OCBPI Project Assessment Document            | #12 | CIE Challenges & CIE Strategies Worksheet                                      |
| #13 | OC Transition Initiative Asset Mapping           | #14 | OCBPI CIE Evaluation Strategy  |
| #15 | Success Stories                                  | #16 | Training Pre-Post Survey Information   |
| #17 | OCBPI Final Report Narrative                     |     |  |

The **OCBPI Final Report Documents** can be found at the following Google Drive...

[https://drive.google.com/drive/folders/1\\_gKcNyidiUNP866QfLUGKoHGa-McPNih?u](https://drive.google.com/drive/folders/1_gKcNyidiUNP866QfLUGKoHGa-McPNih?u)

### #4 OCBPI ACTIVITY: UTILIZE THE OCLPA STEERING COMMITTEE

The **OCLPA** is a collaboration of over **70** agencies and over **200** individuals, committed to CIE, and is providing the structure to access IWD & family input & buy-in. They also will provide the overall mechanism to secure community-wide commitment to the OCBPI TAP. The Orange County Local Partnership Agreement (OCLPA) Steering Committee Advisors include the Regional Center of Orange County (RCOC), the Department of Rehabilitation (DOR), and the State Council on Developmental Disabilities (SCDD). The OCLPA Directory is available upon request!

Additionally, OCBPI connected with the OCLPA Work Teams to support CIE-relevant efforts. Specifically, OCBPI Staff have started working with the following work teams:

|                  |                                |                      |
|------------------|--------------------------------|----------------------|
| Project SEARCH   | Benefits Planning & Management | CIE Data Collection  |
| Family Work Team | Post Secondary Education (DEI) | OC WBL CIE Documents |

Specific strategies included:

- **Provided OCBPI Updates at monthly OCLPA Meetings. Agendas are available upon request.**
- **Continued work with the OCLPA Benefits Planning Work Team to identify strategies to support IWD and their families in addressing benefits issues that arise while employed. ([Benefits planning documents are available in the Benefits Planning Section of the OCBPI Tool Kit.](#))**
- **Worked with the OCLPA Family Support Work Team to develop the following product...Family Continuing Care Outline & Portfolio Contents (Hard Copy Notebook and electronic version using Virginia’s PEATC (Parent Educational Advocacy Training Centers) Digital Portfolio remodeled for California. Tammy Burns, PEATC Deputy Director, has permitted the OCLPA to redesign the portfolio for our use. It will debut in May 2024 and be provided to families through an In-person Workshop on 5/16/24 from 6-7:30 PM. Coaching support will be available to workshop participants.**
- **Worked with the OCLPA PSE Work Team whose purpose is to identify services that currently exist, services that are needed, promising program models, and research that promotes the transition, inclusion, persistence, and success of students with disabilities in postsecondary education and employment; and to provide recommendations for best practices and implementation to the Orange County Local Partnership Agreement (OCLPA) Steering Committee.**

**This project is intended to support Diversity, Equity, Inclusion, and Access (DEIA) efforts throughout Orange County and California. OCLPA and the California Association for Postsecondary Education and Disability (CAPED) are committed to increasing the opportunities for individuals with disabilities to access higher education and competitive, integrated employment. This population has the lowest rates of inclusion in postsecondary education and the highest rates of unemployment and under-employment. Our membership seeks to clarify and communicate strategies we believe will lead to much greater access to higher education and employment for individuals with disabilities. Identifying promising practices, promoting them, and making suggestions for future research are all critical aspects of this project.**

**The focus of the subcommittee is on services, supports, and resources that go beyond what is required by law. Generally, all institutions of higher education provide access, accommodations, and services as required from federal laws such as the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act. California colleges and universities are required to follow Title 5 of the Education code. OCLPA has identified programs that have implemented innovative and promising programs that go beyond what is required by law to better support the inclusion of students in higher education**

and CIE. Work team members and partners volunteered to interview one or more of the identified programs. The Inclusion Subcommittee will re-convene in the Spring of 2024 to review the survey and interview responses, and to finalize this report.

- Worked with the OCLPA WBL & CIE Documents Work Team to develop the following products...
  - All three OC Work-Based Learning Documents have been formatted and prepared for distribution. These documents will support CIE-relevant programming. The final approved versions have been included: **F.R. Attachment #6: OCWBL #1: Orange County Work Based Learning Document, OC Pre-Employment Skills Development Chart...Preparing Youth & Adults with Disabilities for Competitive Integrated Employment, F.R. Attachment #7: OCWBL #2: OC Employment Skills Development Chart, and F.R. Attachment #8: OCWBL #3: Employment Rating Referral Summary Chart** and have been included in the final OCBPI Products Tool Kit.
- Currently implementing the OCLPA (Orange County Local Partnership Agreement 2024 Action Plan)
  - The OCLPA 23-24 Action Plan was developed and vetted by the OCLPA membership. This plan includes OCBPI Goals, Action Steps, Strategies, Critical Partners, Outcomes, Timeline, Completion Date and Responsible Party. The primary author is Linda O'Neal, CUTPI, SDSUII & RCOC. **This document has been included in the Q1 and Q2 Reports and is available upon request. The OCBPI efforts have been routinely presented and discussed at monthly meetings. The final presentation to the OCLPA was completed on 1/31/24.**

#### **#5 OCBPI ACTIVITY: DEVELOP & PRODUCE OCBPI CIE PRODUCTS**

The OCBPI Transformative Action Plan provides comprehensive information and methods for expanding & improving CIE opportunities for **Regional Center Participants, including diverse communities**. All CIE tools have been vetted and formatted for **use as CIE Documents in electronic fill-in format to make them easier to use by all stakeholders. These documents have been included in the Final Report.**

Preparing youth and adults for CIE and careers starts well before age 16. As individuals with disabilities, families, school staff, and community agencies focus on transition planning, employment and career development, there is an expectation that employment options will be available. It is our responsibility in the schools, in the community, and at home to promote and support the acquisition of skills that will prepare our youth/adults to secure and retain jobs that are competitive and integrated.

#### **F.R. Attachment #3: OCBPI Products & Materials Chart**

- Developed CIE Products have been included in the final Chart & OCBPI CIE Tool Kit.

**F.R. Attachment #9: Developed a CIE Glossary for use by all stakeholders: (IWD, Families, Educators, Service Providers, and Business Partners.) The specific focus is on:**

- SSA Disability Benefits
- Transportation
- Disability Related Terms & Acronyms
- Transition Resources

This CIE Glossary is currently being translated into Spanish, Korean, and Vietnamese. Funding has been provided through the OCBPI Grant.

#### **F.R. Attachment #10: OCBPI Competitive Integrated Employment (CIE) Guide**

This guide has been developed for Individuals with Disabilities, Families, Service Providers, Educators (K-12 & Adult Transition Program/ATP), as well as Post Secondary Education.

There are twelve documents located on the following Google Drive...

<https://drive.google.com/drive/folders/1HqkqrREsFv5GloVGyWakPOFD8tgEY3nc?u>

These documents include:

##### **Glossary:**

1. CIE Glossary

##### **Person Driven Planning:**

2. Person-Driven Planning (PDP) One Pager
3. PDP Infographic
4. PDP How to...IWD
5. PDP How to...Family/Team Members

##### **Competitive Integrated Employment (CIE):**

6. Your Right to Competitive Integrated Employment (CIE)
7. OCWBL #1: OC Pre-Employment Skills Development Fillable Chart...Preparing Youth & Adults with Disabilities for Competitive Integrated Employment
8. OCWBL #2: OC Employment Skills Development Fillable Chart

##### **Self-Determination Skills:**

9. CCI-Self Determination Skills Competencies

##### **Benefits Planning & Management:**

10. SSA Benefits Support in California

##### **Post-Secondary Education:**

11. Think College Resource Booklet
12. Think College IEP Goal Ideas

**#6** During the yearlong OCBPI Planning Process, a comprehensive evaluation strategy design has been developed by an experienced and successful research development team from San Diego State University Interwork Institute (SDSUII). Products included are the following:

- CIE Comprehensive Evaluation Strategy Draft
  - **F.R. Attachment #14 (The final version of the OCBPI CIE Evaluation Strategy has been submitted with the Final Report.)**
- Developed the OCBPI Training & Technical Assistance Chart to promote the design of CIE strategies for all stakeholders (business partners, families, K-12 & ATP Educators, PSE Educators, and Business Partners) This chart has been completed.
  - **F.R. Attachment #2: OCBPI Training & Technical Assistance Chart**

- **Completed the OCBPI Project Assessment.** All partners and representative stakeholders have contributed to these comprehensive documents.
  - **F.R. Attachment #11: The OCBPI Project Assessment Document.**
  - **F.R. Attachment #12: CIE Challenges & CIE Strategies Worksheet**
  - **F.R. Attachment #13: OC Transition Initiative Asset Mapping**
- **Collected Success Stories**
  - **F.R.E. Attachment #15: Success Stories**
- **Completed Training Pre-Post Surveys**
  - **F.R. Attachment #16: Training Pre-Post Survey Information Collected**

**\*The F.R. Attachment #17: The OCBPI Q4 Narrative has been uploaded to the DDS Grant Vantage System.**

**The Final Report Documents have been uploaded to the Grant Vantage System and are available on the following Google Drive...**

[https://drive.google.com/drive/folders/1\\_gKcNyidIUNP866QfLUGKoHGa-McPNih?u](https://drive.google.com/drive/folders/1_gKcNyidIUNP866QfLUGKoHGa-McPNih?u)