**Collaboration Worksheet**

**Transition Planning and Student Services for   
Secondary Students with Disabilities**

DOR District Office:

Local Educational Agency:

# Introduction: How to Use this Worksheet

The Collaboration Worksheet is designed to complement Appendix A from the California Department of Education / Department of Rehabilitation (CDE/DOR) Interagency Agreement. It provides a series of discussion questions, organized by topic, and includes references to the corresponding sections in Appendix A. Each question expands upon a key idea in the appendix and focuses on the specific way that a local educational agency (LEA) and DOR district will work together, recognizing that each local area has unique resources, staffing, and business processes.

This worksheet can also enrich the development of a Memorandum of Understanding (MOU). All LEAs and DOR districts that choose to establish an MOU are invited to document their local processes and agreements and include these sections in their MOU. In either case, the goal is to facilitate meaningful conversations for coordination between LEAs and DOR districts, resulting in strong, effective, local collaborations that support the successful transition of secondary students with disabilities.

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# Outreach

**Appendix A References**

*Refer to the Outreach section on pages 4-5 of Appendix A when discussing the questions below. These pages include examples of different populations who may benefit from outreach, such as secondary students receiving special education services and students with disabilities who are not receiving special education services (e.g., students served under Section 504), among others.*

**Discussion Questions**

1. How will the LEA support DOR efforts to identify and outreach to secondary students with disabilities that need DOR Student Services and transition services by education and VR?
2. Consider the methods that may be used for outreach for different populations and different schools or educational groups, if applicable. Consider options for outreach to students, parents/families, and school personnel.

# Referrals

**Appendix A References**

*Refer to the Coordination and Referrals section on pages 6-7 of Appendix A when discussing the questions below. It summarizes different populations who may be referred to different DOR services, including DOR Student Services, the Transition Partnership Program (TPP), and Vocational Rehabilitation (VR) Services.*

*The Coordination and Referrals section on page 8 notes the need to develop procedures for making joint referrals to other providers, and guidelines for written consent for referrals and the release of student information.*

**Discussion Questions**

1. How will the LEA refer students with disabilities to DOR Student Services? Address any unique referral procedures for students served through special education, under Section 504, in alternate education programs, and any other specific population.
2. For schools with a Transition Partnership Program (TPP) or We Can Work contract, describe how referrals to TPP or We Can Work will differ from referrals to services by DOR Student Services staff.
3. How and when will the LEA provide referrals to the VR program? Describe when a referral to the VR program, rather than DOR Student Services, would be appropriate, or if all referrals from the school will be to DOR Student Services.
4. How will the LEA and DOR manage joint referrals to other employment and training providers, such as the local America’s Job Center of California or other programs?
5. What are the referral guidelines related to written consent of the student and, when appropriate, the student’s family, legal guardian, or conservator?

# Accessing Students on Campus

**Student Protections**

**Appendix A References**

*Refer to the Coordination and Referrals section on page 7 of the Appendix when discussing the questions below. The “Accessing Students on Campus” section notes that DOR districts will follow LEA guidelines for accessing students and obtaining background checks.*

**Discussion Questions**

1. What are the LEA policies and procedures related to fingerprinting and background checks? What are the processes for DOR staff fingerprinting, and how will the DOR arrange payment or reimbursement of associated costs? Also outline procedures for notifying the DOR District Administrator if a DOR staff member may not work on school grounds.
2. What are the LEA policies and procedures related to other student protections, such as TB testing or school check-in procedures?

**Working with Students on Campus**

**Appendix A References**

*Refer to the Coordination and Referrals section on pages 6-7 of the Appendix when discussing the questions below. Page 6 notes that LEAs may provide physical space on school grounds for DOR Student Services. Page 7 includes examples of when services may be provided, based on local agreements.*

**Discussion Questions**

1. How and when may DOR staff access students on campus to provide DOR Student Services? Indicate the differences, if any, in options for accessing students who are working toward a diploma and those who are working toward a certificate of completion. Consider whether any of the following methods are appropriate ways for DOR staff to provide DOR Student Services to students on campus:

* As a designated class for credit
* During elective periods
* During summer
* After school
* Through other arrangements

1. Which physical space(s) on campus, if any, may DOR staff use for meeting with students? Describe whether these areas will provide space for either individual or group meetings, and when they are available. Include any requirements for accessing, opening, or locking the space.
2. What campus resources are available to DOR staff for the purpose of providing DOR Student Services? Examples may include internet service, access to computer or television monitors, or student access to computers.

# Coordination of Services

**Coordinating Transition Services and** **DOR Student Services**

**Appendix A References**

*Appendix A describes ways to support the coordination of services through DOR and the LEA. Refer to the Transition and DOR Student Services Planning section on page 4 when discussing the questions below. It notes that the Individualized Education Program (IEP) and the Individualized Plan for Employment (IPE) shall include, as appropriate, a statement of interagency responsibilities.*

*Additionally, the Coordination of DOR Student Services section on page 6 notes that DOR staff will be familiar with LEA services comparable to DOR Student Services, to avoid duplication in services.*

**Discussion Questions**

1. How will LEA and DOR district staff work together to identify transition services offered by the LEA that are comparable to the DOR Student Services? How can each agency’s services supplement the other’s?
2. How will the LEA and DOR coordinate the provision of transition services, including DOR Student Services?
3. How will the LEA and DOR establish linkages to Child Welfare or Juvenile Justice services to coordinate transition services, including DOR Student Services, for foster or adjudicated youth?

**Students Served by Special Education: IEP Meetings**

**Appendix A References**

*Refer to the section Transition and DOR Student Services Planning on page 4 to review statewide agreements related to IEP meetings. Consider the questions below when discussing local methods that will work best.*

**Discussion Questions**

1. How and when will LEAs invite DOR to IEP meetings? Who are the appropriate contacts at the LEA and DOR? How will the IEP and IPE include detail on each agency’s responsibilities for services?

**Students with Disabilities who are Not Served by Special Education**

**Appendix A References**

*Refer to the section Students with Disabilities who are Not Served by Special Education on pages 12-13 of the Appendix when discussing the question below. Consider that local procedures for coordination may align with procedures for referrals for these students.*

**Discussion Questions**

1. How will the LEA and DOR coordinate services for students with disabilities who are referred to DOR and are not served by special education?

**Information Sharing with Written Consent**

**Appendix A References**

*Appendix A includes multiple references to information sharing. Refer to the Coordination and Referrals section on pages 6-7 of the Appendix when discussing the questions below. It addresses students referred to DOR Student Services; pages 8-9 address students referred to VR Services.*

**Discussion Questions**

1. How will the LEA and DOR share existing and updated student information? Who will share what information in which circumstances? Consider when the following documents would be appropriate to share (with appropriate written consent):

* School Information:
  + Student’s unique identifier.
  + Current IEP.
  + Current 504 documentation.
  + Results of individual assessments, including other assessments, such as the most current medical, social psychological, speech and language assessments, psychological or psychiatric.
  + Career aptitude and interest assessments, if available.
  + Language proficiency assessment.
  + Student health screening records.
  + Most recent evaluations.
* DOR Information:
  + Expected DOR Student Services.
  + Determination of eligibility.
  + Priority category information (level of severity of disability, significance scale score, and application date).
  + Current IPE.

# Financial Responsibilities

**Appendix A References**

*Refer to the Financial Responsibilities section on pages 10-12 of Appendix A when discussing the questions below. It outlines the statewide framework for determining which entity will pay for what services, including the following:*

* *The LEA is responsible for providing and paying for the transition services agreed upon in the IEP required to be provided to students with disabilities who are eligible for services under the IDEA.*
* *The DOR is responsible for providing and paying for or arranging for the provision of DOR Student Services identified and agreed upon by the student with a disability, and VR, DOR Student Services, and transition services agreed upon in the IPE for the period that the individual is participating in the VR program as reflected in the individual's IPE.*

*In cases when a service, including a DOR Student Service or transition service, could be provided by either the LEA or DOR, it may warrant discussion and mutual agreement.*

**Discussion Questions**

1. How will LEA and DOR staff work together to coordinate financial responsibilities for DOR Student Services and transition services in cases when a service could be provided by either the LEA or DOR? Consider the criteria below to determine financial responsibility when a service could be provided by either the LEA or the DOR.
2. Determine the purpose of the service. Is the service more related to employment outcome or education?
3. Determine if the service is customary. Is the service one that the LEA customarily provides under part B of the IDEA?
4. Determine the student’s eligibility for the service. Is the student with a disability eligible for transition services under IDEA?

# Coordination of Section 511 Documentation Requirements –

**Students with Disabilities Seeking Subminimum Wage Employment**

**Appendix A References**

*Refer to pages 9-10 of Appendix A for a summary of the required coordination for students with disabilities seeking subminimum wage employment.*

**Discussion Questions**

1. When a student with a disability is known to be seeking subminimum wage, how will transition activities under IDEA support the exploration of competitive integrated employment options?
2. How will the LEA and DOR district work together to coordinate the documentation required by Section 511 for students with disabilities seeking subminimum wage employment?

# Contacts and Communication

**Appendix A References**

*Refer to the Contacts section on page 13 of Appendix A. It provides a placeholder for one school contact and one DOR contact. When discussing this section, LEAs and DOR districts may want to consider whether it would be helpful to add additional contacts, as described in the questions below, particularly for agreements that include multiple schools.*

**Discussion Questions**

## Schools

1. List the school(s) and/or educational setting(s) included in this Agreement.

## Interagency Agreement Contacts

Identify the individuals responsible for signing the LEA-DOR Interagency Agreement. Also list the name, phone number, and email address of the Superintendent and Special Education Local Plan Area (SELPA) Director, if not the signatory of the Agreement.

**LEA**

**Education Official**:

School or District:

Address:

Address Line 2:

Phone Number (main):

Phone Number (Education Official):

Email (Education Official):

**Superintendent**:

Superintendent Phone Number:

Superintendent Email:

**SELPA Director**:

SELPA Director Phone Number:

SELPA Director Email:

**DOR**

**District Administrator (DA):**

DOR District:

District Office Address:

Address Line 2:

Phone Number (District Office):

Phone Number (DA):

Email (DA):

## Key Contacts

1. Identify the key LEA contacts for this LEA-DOR Agreement, including name, position, phone number, email address, and school. Also indicate each contact’s responsibility area.  
     
   Consider that each LEA may have multiple key contacts, such as the following:

* Primary contact for each school (if more than one)
* Contacts for specific coordination responsibilities, such as:
  + Outreach.
  + Referrals of students receiving special education services.
  + Referrals for students with disabilities not served under special education.
  + Referrals to the Transition Partnership Program (TPP)
  + IEP meeting invitations.
  + Coordination of services for students not served under special education.
  + Student information sharing – with appropriate written consent, send and receive student information with DOR (i.e., responding to requests for student information from DOR).

1. Identify the key DOR contacts for this LEA-DOR Agreement, including name, position, phone number, email address, and DOR district. Also indicate each contact’s responsibility area.  
     
   Consider that each DOR District may have one or more key contacts, such as the following:

* School Liaison (primary)
* School Liaison (secondary)
* Team Manager(s) of School Liaisons
* TPP Counselor (for schools with a TPP contract)
* Contract Administrator (for schools with any third-party agreement or other contract with DOR)

## Communication

**Appendix A References**

*The essence of Appendix A is acknowledgment that each local area will have different coordination procedures due to unique operational and staffing characteristics. Similarly, these local procedures may need to change over time.*

*Refer to page 5 of the Coordination and Referrals section. It notes that DOR will review the Interagency Agreement with designated LEA staff on an annual basis. Consider whether a communication plan would be helpful for sharing, reviewing, and, if appropriate, revising local agreements.*

*As illustrated in the discussion questions below, a communication plan typically provides a description of the following key elements: a) the method of communicating, b) the audience, c) the purpose of the communication, c) the frequency, and d) the person responsible for the communication.*

**Discussion Questions**

1. How will the LEA and DOR district maintain regular communication? Will information about the agreements be shared in a joint meeting with DOR and LEA staff? Would a quarterly, semi-annual, or annual meeting be helpful, or would informal and as-needed communication work best? Which contact will be responsible for initiating what communications?