Instructional Guide to the Technical Assistance (TA) Process and Request Form

*This is for TA from the DDA contracts with WISE or Service Alternatives*

**Summary:** Technical assistance requests from Developmental Disabilities Administration’s (DDA) contracts with WISE or Service Alternatives all require prior approval from DDA before the start of service. The TA request forms are filled out by the county staff seeking TA funding from the DDA contract with Washington Initiative for Supported Employment (WISE) or Service Alternatives. **Counties who are pursuing this funding option do not have available funding within their contract allotment to pursue technical assistance.** **DDA TA funds are limited and there is an expectation that counties use their contract dollars before pursuing these funds**. If you are unsure if you have funding available or what type of technical assistance to request please contact your DDA Regional Employment Specialist for support.

Categories of technical assistance to consider:

1. **Individualized Technical Assistance** - relates to an individual client who has a barrier and needs support to move forward on their pathway to employment.  It is a short term service with a specific outcome or product. Examples include but are not limited to a Person Centered Plan, behavior analysis, or a communication plan.
2. **Technical Assistance / Training**  - When there are many individual clients at one agency that need support to move forward on their pathway to employment and the request is related to the staff skillset. Examples include but are not limited to History/Discovery/Employment Planning, Job Development/Marketing, Systematic Instruction/Training, or Social Security/Benefits.
3. **Transformation Plan** - A plan for an agency to change the way it does business, typically moving from a segregated model to an integrated model. The plan includes the necessary steps to successfully get there.  A plan includes many components such as looking at existing staff skillsets and interviewing leadership; families; board members; clients; and all interested parties. The plan is developed to support an agency to move forward in supporting clients in integrated employment.

**DDA Priority Areas for TA requests support**

1. Individuals with the most significant support needs in pursuing competitive employment;
2. Agencies to transform providing services in segregated settings to integrated settings; and
3. Agencies to improve employment outcomes: client wages, hours worked, and/or benefits earned.

**Process:** When a need for TA is identified, the appropriate county should reach out to either Service Alternatives or WISE to discuss the details of the request. If this is a first time request or if you are unclear with the TA process, please contact your DDA Regional Employment Specialist.

Consider:

* Does the agency (WISE or Service Alternatives) have a consultant with the expertise needed in this case?
* What is the estimated time it will take to deliver this TA?
* What is the estimated cost?
* What is the final product or expected outcome when the TA is complete (person-centered plan, communication strategy sheet, benefits analysis, etc.)?
* If the TA recipient is an agency are they also financially invested in training or transforming?
* If this an extension of a prior request – why was the TA not completed initially? What will be different this time?

Once the county has decided on the TA agency and TA consultant and worked through the details of the service, cost, and final product – the TA request form should be completed and routed to your Regional Employment Specialist. The Regional Employment Specialist will review for content and completeness and then, forward to Megan Burr and Branda Matson at DDA Headquarters.

**Instructions on filling out the ITA request form:**

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| **County making request:** | Please type the name of the county making the ITA request. | **Contact person:** | Please type the name of the individual to contact at the county indicated above. |
| **Contact info, phone and email:** | Please type the phone number and email of the contact person at the county indicated above. | **ITA agency:** | Please type the name of the ITA agency you are working with; Service Alternatives or WISE. |
| **Service request:** | Please select if it’s ITA, TA/Training, or Agency Transformation.  | **Estimated start and end date of service:** | Please enter the estimated date the service will start and begin. |
| **Consultant Name (if identified):**  | Please type the name of the subject matter expert that is providing TA. | **Consultant contact info, phone, email, website:**  | Please type all available contact info for the consultant providing the ITA as indicated above. |
| **Why this particular consultant:**  | Please provide insight into why this consultant was selected:Were they recommended by the TA agency? Did the TA recipient and/or their support team request this consultant? Did the provider request this consultant? Were they the only available consultant with certain expertise? | **What actions have you explored to making this request:** | Have you invested contract or local dollars in TA before? Is there a neighboring county who could benefit from and contribute towards a joint TA effort? If the TA recipient is an agency – are they investing any funds to support this TA? |
| **The final TA product:** | Please describe what the final product will be when the ITA has been completed:Will there be a written plan for communication, behavior, person-centered approached? Will there be a benefits analysis or a transformation plan? | **What is the TA cost and explain the calculated cost:** | Please type the cost and provide detail: is this an hourly rate, does it include travel and other expenses, are there additional fees? |
| **Additional Comments:** | Please type any additional detail you believe would be pertinent for DDA to understand in order to approve the ITA. | **DDA use:** | This section will be completed by DDA staff. |

**Contact Info:** Once the request form is complete, please email the form to your Regional Employment Specialist as well as Megan Burr and Branda Matson at DDA Headquarters. If you have any questions about the form or process, please contact Megan Burr.

For specific questions on TA consultants, please contact WISE or Service Alternatives.

Phone and contact info can be found below.

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| Branda Matson, DDA HQ | 360-407-1522, Branda.Matson@dshs.wa.gov  |
| Megan Burr, DDA HQ | 360-470-1523, Megan.Burr@dshs.wa.gov  |
| Terry Redmon, DDA HQ | 360-407-1548, Terry.Redmon@dshs.wa.gov  |
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