

[TA Form]
TECHNICAL ASSISTANCE REQUEST/FOLLOW UP FORM

Formal technical assistance (TA) is initiated by completing this form. Both Central Administration members and program managers may initiate TA, however, this form is only completed by CA members.

SECTION A

Person initiating TA request and their role:

Date of initial request:

Program in need of TA:

Program Contact (Name, Phone, Email):

Situation prompting TA request: (check the box(es) that apply and provide details that will be helpful in responding to the request)

1) Change in program management/host agency.

2) New Program start-up

3) PM orientation/needs assessment

4) Challenges meeting performance standards, indicators, and target

5) Practice Issues with home visitors or supervisors

6) Other

SECTION B

TA Lead (Primary TA Contact):

Plan Due Date (2-weeks from received request):

SECTION C

TA Plan

To be completed by Primary TA Contact (Lead Central Administration member)

Describe the plan discussed with the Program Manager and other relevant CA members. This includes timeframe, methods for delivering assistance such as on-site or video-call, people to be involved, etc.

Date Plan Discussed with PM/CA:

SECTION D

Follow Up/Next steps

This form is maintained in the program's folder on CA's shared QA/TA Google drive.

To be completed by Primary TA Contact (Lead Central Administration member) in collaboration with Program Manager. A separate document may be used to summarize follow-up. Note the name of the document below and save it to the appropriate Program Folder.

Describe what took place and next steps, include specific time frames for the next steps and check-in phone call(s). *Copy and paste this section for each follow-up or check-in that occurs.*

Date Follow-Up Completed:

SECTION E

Final Check in (May occur during the final follow up call/Section D)

Ask two questions:

1. As a result of this TA, what will look different in your practice?
2. What could you see that would have enhanced this process? What else could have been helpful?

Share final TA summary and document changes in practice identified as a result of TA with PM.

Date Check-In Completed: