



**Service Alternatives, Inc.**  
770 NE Midway blvd ste 201  
Oak Harbor, WA 98277  
[www.servicealternatives.com](http://www.servicealternatives.com)

DATE: 5/18/2023

Name: Service Alternatives, Inc.

Primary Place of Business: 770 NE MIDWAY BLVD STE 201 OAK HARBOR, WA 98277

Phone: 360-678-6071

Fax: 360-678-3247

Email Address: [rob.hays@servicealternatives.com](mailto:rob.hays@servicealternatives.com)

Name of Contact Person: Rob Hays

Dear Sir or Madam:

1. Enclosed please find the Response of Service Alternatives with respect to the above Competitive Solicitation. This Response includes this Letter (Attachment B) as well as Attachments C (Bidder Certifications), D (Bidder Response Form), E (Contractor Inclusion Plan), and F (Contractor Intake Form) as set forth in the Solicitation Document. In addition to these completed Attachments, the response includes the following additional materials (if any):
  - Exhibit A: Contractor Payments FY '22-'23
  - Exhibit B: TA RFP Staff Resumes
  - Exhibit C: Example SA Financial Report (confidential)
  - Exhibit D: TA Request
  - Exhibit E: Statement of Work
  - Exhibit F: SA Training Evaluation Form
  - Exhibit G: SA Consultation Evaluation Form
  - Exhibit H: SA Facilitation Evaluation Form
  - Exhibit I: SA R&D Evaluation Form
  - Exhibit J: SA Annual Report 2022
  - Exhibit K: Event Report Summary
  - Exhibit L: 2023 SA TA Resource Guide
  - Exhibit M: Contractor Intake Form
  - Exhibit N: SA Base Contract
  - Exhibit O: DDA Contract Addendum 2020
  - Exhibit P: Contractor Intake Form Attachments
2. I am authorized to submit this Response on behalf of Bidder, to make representations on behalf of Bidder and to commit Bidder contractually.
3. I have read the Solicitation Document and Sample Contract. In submitting this Response, Bidder accepts all terms and conditions stated in the Solicitation Document, including those set forth in the following amendments which Bidder has downloaded (please complete, indicating if no amendments were issued):

<b>Amendment Number(s)</b>	<b>Date(s) Issued</b>
RFP2234-821-Q&A Amendment	5/5/23
RFP2234-821-DDA-Training-Amend	5/5/23

4. Bidder represents that it meets all minimum qualifications set forth in this DSHS Competitive Solicitation and is capable, willing and able to perform the services described in the DSHS Competitive Solicitation within the time frames set forth for performance.
5. By my signature below, I certify that all statements and information provided in Bidder's Response are true and complete.

Sincerely,



Robert Hays  
Training Director

**Attachment C**  
**Bidder Certifications and Assurances**

Bidder must sign and include the full text of this Attachment C with the Response. Altering or conditioning your certification of this Attachment C may result in your bid being disqualified.

Under the penalties of perjury of the State of Washington, Bidder makes the following certifications and assurances as a required element of its Response to this Competitive Solicitation. Bidder affirms the truthfulness of these facts and acknowledges its current and continued compliance with these certifications and assurances as part of its Response and any resulting contract that may be awarded by DSHS.

1. Bidder declares that all answers and statements made in Bidder's Response are true and correct.
2. Bidder certifies that its Response is a firm offer for a period of 180 days following receipt by DSHS, and it may be accepted by DSHS without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 180-day period. In the case of a protest, the Bidder's Response will remain valid for 210 days or until the protest is resolved, whichever is later.
3. Bidder has not been assisted by any current or former DSHS employee whose duties relate (or did relate) to this Solicitation and who assisted in other than his or her official, public capacity. If there are any exceptions to these assurances or if Bidder has been assisted, Bidder will identify on a separate page attached to this document each individual by: (a) name, (b) current address and telephone number, (c) current or former position with DSHS, (d) dates of employment with DSHS, and (e) detailed description of the assistance provided by that individual.
4. Bidder certifies that Bidder is not currently bankrupt or a party to bankruptcy proceedings and has not made an assignment for benefit of creditors and authorizes DSHS to conduct a financial assessment of Bidder in DSHS' sole discretion.
5. Bidder acknowledges that DSHS will not reimburse Bidder for any costs incurred in the preparation of Bidder's Response. All Responses shall be the property of DSHS. Bidder claims no proprietary right to the ideas, writings, items or samples submitted as part of its Response.
6. Bidder acknowledges that any contract award will incorporate terms set forth in the Sample Contract(s), including its attachments and exhibits, as set forth as Attachment A to the Solicitation Document, or may, at DSHS' option be negotiated further. DSHS may elect to incorporate all or any part of Bidder's Response into the Contract.
7. Bidder certifies that it has made no attempt, nor will make any attempt, to induce any other person or firm to submit, or not submit, a Response for the purpose of restricting competition and that the prices and/or cost data contained in Bidder's Response: (a) have been determined independently, without consultation, communication or agreement with others for the purpose of restricting competition or influencing bid selection, and (b) have not been and will not be knowingly disclosed by the Bidder, directly

or indirectly, to any other Bidder or competitor before contract award, except to the extent that Bidder has joined with other individuals or organizations for the purpose of preparing and submitting a joint Response or unless otherwise required by law.

8. Bidder acknowledges that if it is awarded a contract containing Business Associate requirements under the Health Insurance Portability and Accountability Act of 1996 (HIPAA), or any other Data Security requirements, that Bidder will incorporate the terms of such Business Associate or Data Security requirements into all related subcontracts.

9. Bidder acknowledges that if awarded a contract with DSHS, Bidder is required to comply with all applicable state and federal civil rights and other laws. Failure to comply may result in contract termination. Bidder agrees to submit additional information about its nondiscrimination policies, at any time, if requested by DSHS.

10. Bidder certifies that Bidder has not, within the three-year period immediately preceding the date of release of this competitive solicitation, been determined by a final and binding citation and notice of assessment issued by the Department of Labor and Industries or through a civil judgment to have willfully violated state minimum wage laws (RCW 49.38.082; Chapters 49.46 RCW, 49.48 RCW, or 49.52 RCW).

11. Bidder certifies that it has a current Business License and agrees that it will promptly secure and provide a copy of its Washington State Business License, unless Bidder is exempted from being required to have one, if Bidder is awarded a contract.

12. Bidder authorizes DSHS to conduct a background check of Bidder or Bidder's employees if DSHS considers such action necessary or advisable.

13. Bidder has not been convicted nor entered a plea of *nolo contendere* with respect to a criminal offense, nor has Bidder been debarred or otherwise restricted from participating in any public contracts.

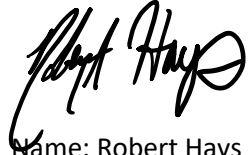
14. Bidder certifies that Bidder has not willfully violated Washington state's wage payment laws within the last three years.

15. Bidder certifies that Bidder is not presently an agency of the Russian government, an entity which is Russian-state owned to any extent, or an entity sanctioned by the United States government in response to Russia's invasion of Ukraine.

16. Bidder acknowledges its obligation to notify DSHS of any changes in the certifications and assurances above.

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

Bidder's Signature:

A handwritten signature in black ink, appearing to read "Robert Hays". The signature is stylized with a large, sweeping initial "R" and a circular flourish at the end.

Name: Robert Hays

Title: Training Director

Organization Name: Service Alternatives, Inc.

Date: 5/18/23

Place Signed (City, State): Lynnwood, WA

<b>ATTACHMENT D: BIDDER RESPONSE FORM</b> This form is broken into five sections: Section 1. Administrative Response; Section 2. Management Response; Section 3. Technical Response Section 4. Quotation/Cost Proposal; and Section 5. EO 18-03 Response. Bidders must respond to all questions in the order and in the expandable space provided. If a question requires Bidder to submit additional documents, please attach them to this document and label them clearly as part of your response to this Attachment D.		
<b>1</b>	<b>BIDDER INFORMATION (ADMINISTRATIVE RESPONSE)</b> Bidder's response to the questions in this Section 1, combined with the information provided in Bidder's Submittal Letter and Certifications and Assurances, comprise Bidder's Administrative Response to this Solicitation. While the Administrative Response is not given a number score, information provided as part of Bidder's Administrative Response may cause the Bid to be disqualified and may be considered in evaluating Bidder's qualifications and experience.	<b>MAXIMUM TOTAL POINTS</b>
a	Please indicate whether you employ or contract with any current or former state employees. If the answer is yes, provide the following information with respect to each individual: 1. name of employee or contractor; 2. the individual's employment history with the State of Washington; 3. a description of the Individual's involvement with the response to this Solicitation; and 4. the Individual's proposed role in providing the services under this any Contract that may be awarded.	NOT SCORED
	<p>ANSWER: We employ Alena Yastchenko, who is employed by Central Washington University. Alena has been a faculty at Central Washington University for 24 years. At Service Alternatives, Alena serves as the Instructional Design and Copyright Specialist. In this capacity, she reviewed the response to this Solicitation for completeness, accuracy, responsiveness, and quality of writing. Alena has previously served as a curriculum developer, consultant, and trainer in fulfilling Service Alternatives' TA requests. If awarded the contract, we anticipate Alena would continue to fulfill these functions.</p> <p>We also subcontract with Gene McConachie, a former employee of the state at DSHS who retired in January 2018. Gene McConachie was not involved in the construction of this proposal beyond being referenced as an active contractor with Service Alternatives. Gene McConachie's proposed role in providing services aligns with his sole proprietorship offering Behavioral Health services as a Psychologist and Behavior Consultant.</p>	
b	Please list the names and contact information for three individuals you agree may serve as Bidder references and may freely provide information to DSHS regarding the reference's experience and impressions of Bidder. In providing these names, Bidder represents that it shall hold both DSHS and the organizations and individuals providing a reference harmless from and against any and all liability for seeking and providing such reference.	NOT SCORED
	<p>ANSWER:</p> <p>Carol Bailey -- Department of Children, Youth, and Families -- 425-359-9583 -- Carol.Bailey@dcyf.wa.gov            Ben Martin – Snohomish County Developmental Disabilities – (425) 388-7304 -- Ben.Martin@snoco.org</p>	

	Steve Conrad – Conrad Consulting – (360) 936-9795 -- steve@conradconsultingco.org	
c	Please indicate whether your Response contains any variations from the requirements of the Solicitation Document. If the answer is yes, list each variation with specificity and include the pertinent page numbers containing the variation.	NOT SCORED
	ANSWER: This response contains no variations from the requirements of the Solicitation Document.	
d	Please indicate whether you are requesting that DSHS consider any exceptions and/or revisions to the sample contract language found in Attachment A. If so, state the page of Attachment A on which text you request to change is found, and state the specific changes you are requesting. DSHS shall be under no obligation to agree to any requested changes, and will not consider changes to contract language or negotiate any new language that are not identified in response to this question.	NOT SCORED
	ANSWER: We are requesting DSHS consider an exception to the insurance requirements of some subcontractors, as addressed on Page 16, section 10, titled "Insurance." As primary contractor, we will maintain all insurance requirements as described. We request a change to the language related to subcontractor insurance expectations. We hold the belief that those who are best able to do the work ought to execute it. Given the expansive nature of this contract requiring diverse and emerging services, we invest contract dollars heavily into the community through exceptionally qualified and diverse subcontractors when they would best perform the request. These subcontractors include small and microbusinesses where the nature of their business does not have a physical premises or fleet of vehicles. The contract, as written, requires more insurance than necessary for some subcontractors and severely limits the opportunities of microbusinesses from lending their expertise and experience to this contract which runs contrary to the efforts to include diverse businesses. We suggest the state continues to empower the contract manager of this contract to provide exceptions to insurance requirements as appropriate to the work of the subcontractor.	
e	If Bidder considers any information that is submitted as part of its Response to be proprietary, please identify the numbered pages of Bidder's Response containing such information and place the word "Proprietary" in the lower right hand corner of each of these identified pages.	NOT SCORED
	ANSWER: We include one exhibit with confidential information that we mark proprietary. It can be found as "Exhibit C - Example SA Financial Report (Proprietary)"	
f	Please indicate whether you have had a contract terminated for cause or default within the past five (5) years. If so, please provide the terminating party's name, address and telephone number and provide a summary describing the alleged deficiencies in Bidder's performance, whether and how these alleged deficiencies were remedied and any other information pertinent to Bidder's position on the matter. "Termination for Cause" refers to any notice to Bidder to stop performance due to Bidder's asserted nonperformance or poor performance and the issue was either (a) not litigated; (b) litigated with a resulting determination in favor of the other party; or (c) is the subject of pending litigation	NOT SCORED
	ANSWER: We have not had a contract terminated for cause or default in the past five years.	

g	Please identify any prior contracts Bidder has entered into with the State of Washington within the past ten (10) years and identify the dates and nature of the contract and primary agency contact for each.	NOT SCORED
	<p>ANSWER:</p> <p><b>Contract Name – Most Recent Execution Date, Nature, Agency Contact</b></p> <ul style="list-style-type: none"> <li>• Training &amp; Technical Assistance for Developmental Disabilities – 7-9-19, Technical Assistance, Robert Hays</li> <li>• No. K7675 Competitive Solicitation No. 21-0004 Leadership Development – 7-1-21, Leadership Development Trainings for DES, Robert Hays</li> <li>• Professional Service Contract, Provider Training – 3/17/2022, Contract to Provide Quality Training to Long-Term Care Workers, Venerando Azurin</li> <li>• 2021.02 DDA Community Residential Reg 2 South – 3/1/2021, provide supported living in Region 2 South, Larissa Floyd</li> <li>• 2021.02 DDA Community Residential Reg 2 North – 3/1/2021, provide supported living in Region 2 North, Larissa Floyd</li> <li>• 2021.02 DDA Community Residential Reg 3 North – 3/1/2021, provide supported living in Region 3 North, Larissa Floyd</li> <li>• Overnight Planned Respite Services for Adults (Lynnwood) – 7/1/2021, Respite Services, Larissa Floyd</li> <li>• Overnight Planned Respite Services for Adults (Shoreline) – 7/1/2021, Respite Services, Larissa Floyd</li> <li>• Overnight Planned Respite Services for Adults (Tacoma) – 7/1/2021, Respite Services, Larissa Floyd</li> <li>• Responsible Living Skills Program (R6) – 10/1/2021, teach youth independent living skills, Karina Briscoe</li> <li>• Responsible Living Skills Program (R1 and 2) – 10/1/2021, provide temporary intensive wraparound support and treatment program for youth with high-level service needs, Karina Briscoe</li> <li>• Responsible Living Skills Program (R3 and 4) – 10/1/2021, provide temporary intensive wraparound support and treatment program for youth with high-level service needs, Karina Briscoe</li> <li>• Responsible Living Skills Program (R5 and 6) – 10/1/2021, provide temporary intensive wraparound support and treatment program for youth with high-level service needs, Karina Briscoe</li> <li>• Combined In-Home Services – 10/1/2022, provide a chosen array of family support and related services (DCYF), Heather Hansen</li> <li>• CIIBS Intensive Therapy Services – 2/19/2021, Provide Children’s Intensive In-Home Behavioral Support services, Karina Briscoe</li> <li>• DCYF Child Placing Agency (R3 and 4) – 9/24/2021, Follow-up Care Services, Borrowed Home Services, Respite Care Services, Case Aide Services, and Case Management Services, Karina Briscoe</li> <li>• DCYF Child Placing Agency (R1 and 2) – 9/24/2021, Follow-up Care Services, Borrowed Home Services, Respite Care Services, Case Aide Services, and Case Management Services, Karina Briscoe</li> </ul>	



	<ul style="list-style-type: none"> <li>• Behavior Support, Counseling and Consultation Services – 9/6/2022, Counseling Services: Behavior Specialist and Behavior Technician Services, Larissa Floyd</li> <li>• Staff/Family Training and Consultation – 11/1/2018, provide professional assistance to families or direct service providers to help them better meet the needs of the DDD client, Heather Hansen</li> <li>• Independent Living Services – 9/26/2022, provide Independent Living Services (ILS) to DCYF clients, Heather Hansen</li> <li>• Crisis Residential Center – 7/1/2021, provide safety and stability to unaccompanied youth and young adults experiencing homelessness and housing instability, Karina Briscoe</li> <li>• Out of State Health and Safety Review—9/13/2021, provide out of state health and safety visits for DCYF youth placed in a facility in another state or in a state where courtesy supervision was requested through ICPC and denied by the receiving state, Karina Briscoe</li> <li>• Workfirst, 7/1/2022, Provide Workfirst services via the Department of Commerce, Heather Hansen</li> </ul> <p><b>Expired Contracts</b></p> <ul style="list-style-type: none"> <li>• Contracted Training – RIGHT RESPONSE Level 3 and Level 4—7/9/2019 RIGHT RESPONSE Training via Alliance for Child Welfare Excellence for DCYF staff, Chris Breece</li> <li>• DES Training Contract –4/2/2015, Provide Emotional Intelligence Trainings to WA State employees via DES, Robert Hays</li> <li>• DCS Verbal De-Escalation Training – 6/12/2018, Provide verbal De-Escalation Training to Division of Child Support, Robert Hays</li> <li>• Dual Diagnosis Seminar Trainings – 1/15/2016, Provide Dual Diagnosis trainings to Fircrest staff, Robert Hays</li> <li>• Dual Diagnosis Seminar Trainings – 9/11/2015, Provide Dual Diagnosis trainings to Rainier staff, Robert Hays</li> </ul>	
h	<p>Please indicate whether Bidder has been the subject of a lawsuit or administrative proceeding alleging a failure to comply with laws relating to the types of services Bidder proposes to provide pursuant to this Competitive Solicitation. If the answer is yes, please list the nature of the allegations, docket number, disposition and date (if applicable) and Bidder’s explanation of how it has changed its practices or operations relative to any alleged deficiencies since that proceeding was filed.</p>	NOT SCORED
	ANSWER: Not Applicable	
i	<p>Please describe your proposed plans for the use of Subcontractors in performing this contract, listing each Subcontractor, its proposed role and the estimated percentage of the Contract that will be performed by each Subcontractor. Please indicate whether each subcontractor self-identifies or is certified as a small business, a minority-owned business, a woman-</p>	NOT SCORED

	owned business, a disadvantaged business enterprise, or a veteran-owned business. If the answer is yes, please identify the type of organization(s) and provide details of any certifications. Note that all Subcontractors must be approved by DSHS.	
	<p>ANSWER:                  Service Alternatives extensively uses subcontractors in performing technical assistance work. We respect the expertise and lived experiences of our subcontractors and the value they bring to our providers, DDA, and the community at large. At SA approximately 70% of technical assistance funds have been distributed to subcontracted consultants, suppliers, and trainers. Service Alternatives delivers technical assistance as requested and needed by the community. While we cannot guarantee the distribution of work to be performed in the next fiscal year, we can share our list of subcontractors, what they have been paid through DDA funds since July of 2022, if they identify as a diverse or small business, and the role they have played. For this information, please see "Exhibit A: Contractor Payments FY 22-23."</p>	
J	Please describe any programs, policies or activities of your organization that support human health and environmental sustainability in your business practices. If a program, policy or activity is specifically applicable to this Contract, please so indicate.	NOT SCORED
	<p>ANSWER:                  Service Alternatives is in the process of becoming a Psychologically Informed Environment (PIE), a process that includes examining on a personal level what does and does not work for individual employees. For example, not every employee can come into the office in person five, or even three, days a week. Therefore, we offer flexible, hybrid schedules to allow employees to care for children or older parents.                  We also offer a program called Psychological First Aid (PFA), a program available to any employee who has experienced a traumatic event, whether work-related or personal. PFA can help reduce the impact of these events, build the strength and resilience, and is offered by a trained cohort within SA.                  Additionally, SA's employer insurance allows free access to therapy via Teladoc, a service employees often have to pay for out of pocket. The service is virtual, which means our employees do not have to take extra time off work to commute back and forth from their appointment, and can have access to psychiatrists and therapists from the comfort of their own home. We also encourage employees to use the Employee Assistance Program (EAP) to provide assistance in times of hardship, grief or trauma.</p>	
K	Please disclose if you are a certified small business, veteran-owned/operated, women and/or minority-owned business/organization, or if you currently subcontract with any of the above. Please include the length of time you've been certified or have subcontracted with these organizations and provide a list of goods/services provided by these resources.	NOT SCORED
	<p>ANSWER: Service Alternatives is a fully women-owned business but is not certified because our organization is too large to qualify. We also contract with a significant number of subcontractors who are certified as small businesses, veteran-owned/operated, and women and/or minority owned. Service Alternatives has subcontracted with third-party experts since 2011. The goods and services of these subcontractors can be found in "Exhibit L: 2023 SA TA Resource Guide." Their status as a potentially diverse or small business can be found in "Exhibit A: Contractor Payments FY 22-23."</p>	

L	<p>Please provide the names and titles of the key team members you will assign to this Contract, if you are the Successful Bidder, and provide their proposed roles and copies of resumes describing the relevant experience they possess. Bidder should note that if awarded a contract, it may not reassign its Key Personnel from the Project without prior approval of DSHS.</p>	NOT SCORED
	<p>ANSWER:                  Key Members will be as follows:</p> <ul style="list-style-type: none"> <li>• Rob Hays, MBA. Director of Training Institute. Rob Hays serves as the primary contract signer and contact for matters relating to the contract (amendments and other questions related to the contract). As Director of the Training Institute, Rob has overseen Service Alternatives technical assistance operations since 2014. He is a certified learning program manager and holds a Masters in Business Administration. Rob has lead or developed the systems used to monitor and execute Technical Assistance Requests and ensures Service Alternatives’ work remains compliant with contract expectations and legal mandates. Additional information can be found in “Exhibit B: TA RFP Staff Resumes”.</li> <li>• Elizabeth Kittel, Technical Assistance Administrator . Elizabeth Kittel serves as the primary point of contact for contractors, stakeholders and Technical Assistance Coordinators at DDA and meets with key figures at DDA on a monthly basis to review the budget and any necessary adjustments. Elizabeth’s duties include overseeing the budget, onboarding new subcontractors, and the work of the Project Coordinator and Financial Manager. Elizabeth attends key events put on by DDA to help facilitate and host, and represent Service Alternatives. Additional information can be found in “Exhibit B: TA RFP Staff Resumes”.</li> </ul> <p>Other employees of Service Alternatives do not serve as key employees within the contract but provide services as needed for the contract. These services include consultation, coordination, fiscal management, training, instructional design, coaching, and graphic design. These employees are included in “Exhibit B: TA RFP Staff Resumes”.</p>	
2	<b>BIDDER EO 18-03 CERTIFICATION</b>	MAXIMUM TOTAL POINTS
EO	<p>Are your employees required to sign, as a condition of employment, a mandatory individual arbitration clause and/or a class or collective action waiver?</p> <p><b>Please Note:</b> Points for this question will be awarded to bidders who respond that they do not require these clauses and waivers. If you certify here that your employees are NOT required to sign these clauses and waivers as a condition of employment, and you are the successful bidder, a term will be added to your contract certifying this response and requiring notification to DSHS if you later require your employees to agree to these clauses or waivers during the term of the contract.</p>	5
	ANSWER: No	

3	<b>BIDDER CERTIFICATION – WASHINGTON SMALL BUSINESS</b>	MAXIMUM TOTAL POINTS
EO	<p>Are you a Washington Small Business as defined under <b>RCW 39.26.010</b>?</p> <p>According to <b>Chapter 39.26.010 RCW</b>, to qualify as a Washington Small Business, Bidder must meet three (3) requirements:</p> <ul style="list-style-type: none"> <li>a. <i>Location.</i> Bidder’s principal office/place of business must be located in and identified as being in the State of Washington. A principal office or principal place of business is a firm’s headquarters where business decisions are made and the location for the firm’s books and records as well as the firm’s senior management personnel.</li> <li>b. <i>Size.</i> Bidder must be owned and operated independently from all other businesses and have either: (a) fifty (50) or fewer employees; or (b) gross revenue of less than seven million dollars (\$7,000,000) annually as reported on Bidder’s federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years.</li> <li>c. <i>WEBS Certification.</i> Bidder must have certified its Washington Small Business status in Washington’s Electronic Business Solution (<a href="#">WEBS</a>).</li> </ul>	10
	ANSWER: No	
4	<b>BIDDER CERTIFICATION – WASHINGTON CERTIFIED VETERAN OWNED BUSINESS</b>	MAXIMUM TOTAL POINTS
	<p>Are you a Certified Washington Veteran-Owned Business as defined under <b>RCW 43.60A.190</b>?</p> <p>According to <b>Chapter 43.60A.190 RCW</b>, to qualify as a Certified Washington Veteran-Owned Business, Bidder must meet Four (4) requirements:</p> <ul style="list-style-type: none"> <li>a. <i>51% Ownership. Bidder must be at least fifty-one percent (51%) owned and controlled by:</i> <ul style="list-style-type: none"> <li>1. <i>A veteran is defined as every person who at the time he or she seeks certification has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;</i></li> <li>2. <i>A person who is in receipt of disability compensation or pension from the Department of Veteran’s Affairs; or</i></li> <li>3. <i>An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.</i></li> </ul> </li> </ul>	10

	<p><i>b. Washington Incorporation/Location. Bidder must be <u>either</u> an entity that is incorporated in the state of Washington as a Washington domestic corporation <u>or, if not incorporated,</u> an entity whose principal place of business is located within the State of Washington.</i></p> <p><i>c. WEBS Certification. Bidder must have certified its Veteran-Owned business status in Washington’s Electronic Business Solution (<a href="#">WEBS</a>).</i></p> <p><i>d. WDVA Certification. Bidder must have provided certification documentation to the Washington Department of Veterans’ Affairs (WDVA) and be certified by WDVA and listed as such on WDVA’s website (<a href="#">WDVA – Veteran-Owned Businesses</a>).</i></p>	
ANSWER: No		

5	<b>BIDDER QUALIFICATIONS AND EXPERIENCE (MANAGEMENT RESPONSE)</b>	<b>MAXIMUM TOTAL POINTS</b>
	<b>MANDATORY EXPERIENCE AND QUALIFICATIONS</b>	<b>70 pts</b>
A	<p>Please describe in detail, the bidder’s experience in working with populations experiencing intellectual and/or developmental disabilities, including any experience directly relevant to the training and construction of professional development programs designed to support professionals (case management staff, social workers, direct care providers, community partners) in how to support this demographic with maintaining health and safety, financial management, job skills/career development, social and emotional well-being, and developing and supporting individuals with I/DD to reach personal goals and effectively engage in their community. Highlight any experience and/or understanding your firm maintains pertaining to Washington State’s diverse communities and your firm’s involvement in these communities:</p>	15
	<p>ANSWER:</p> <p>Service Alternatives has been supporting people with developmental and intellectual disabilities throughout Washington State for forty years on three levels: direct support, training of other service providers, and policy/legislation advocacy. Our organization comprises three large divisions: Community Services, Residential Services, and the Training Institute, where our Technical Assistance Program is housed.</p> <p>We support individuals throughout their life span: from their own home to residential, in various types of communities and through numerous client service contracts. Our services are grounded in values of respect, person-centeredness, wellness, competency, self-sufficiency, community, and every person’s right to live a meaningful and fulfilling life of their choosing. In short, we believe that a community that is not inclusive of those with developmental/intellectual disabilities is an incomplete community. In terms of financial management, this service includes employing and contracting with benefits planners to ensure that our clients balance and maximize their financial resources to facilitate independent living and empower client choice.</p> <p>Consistent with the philosophy of person-centered planning, an individual’s circles of support (families, care providers, advocates, friends, etc.) are an integral part of service planning and delivery. In addition to being a recognized expert in the field of directly supporting individuals with intellectual and developmental disabilities since the 80’s, Service Alternatives Training Institute is a nation-wide provider of training and consultation to those engaged in serving people with disabilities.</p>	

	<p>Our training content is developed by highly experienced and educated individuals with demonstrated expertise in their fields. Our training curricula are solidly grounded in latest research, as well as adult learning principles and accessibility. Lastly, we provide indirect support to individuals with disabilities in our state on the levels of policymaking and legislation. Many of our employees participate in advocacy efforts, serve on various local, state, and national councils, communicate with their legislators, and provide testimony in the House and Senate when requested.</p> <p>While COVID-19 interrupted many things, our critical services continued. Whatever could be done online was moved to Zoom or other virtual meeting platforms, and we continued working with clients while protecting ourselves and others with necessary PPE, a COVID notification system implemented by HR, and strict protocols around exposure and limiting risk for those most vulnerable. Most of our services have resumed in person, but our employees continue to mask in high-risk situations and when they are notified of any exposures, and many of our events are now offered in a virtual or hybrid capacity. We maintain that this improves equity, provides flexibility for our employees and those attending trainings, and lowers risk of exposure to COVID-19.</p>	
B	<p>Please describe the bidder’s skill set, qualifications, and experience in creating professional development programs and training reflective of the following frameworks: adult learning theory, person-centered practices, equity, diversity, access and inclusion principles, and cooperative learning theory.</p>	15
	<p>ANSWER:</p> <p>Service Alternatives has been supporting individuals with intellectual/developmental disabilities through contracts with DDA since 1983. We have intentionally developed a culture of learning from individuals and their existing support system how we can best support them and understand that each person has specific strengths and needs. Our culture of learning is rooted in Person-Centered Planning, Adult Learning Theories, and our ongoing shift to a Psychologically Informed Environment (PIE). Service Alternatives has also provided technical assistance services to DDA since 2011, supporting community providers in meeting training, development, and consultation needs. This work includes coordinating with the state’s Roads to Community Living program to identify and support RHC residents’ transition to community supported living.</p> <p>We embrace Person-Centered Planning (PCP) by coordinating with subcontractors who provide PCP facilitation to create plans for clients in the community, as well as partnering with DDA to put on the annual Person-Centered Planning Symposium. We encourage each person to use their voice in directing their own supports and work collaboratively as a team with each client, their families, and any professionals involved in their care. Internally, our staff start with a CARE assessment and Person-Centered Planning, and then develop an Individual Instruction Support Plan (IISP) that identifies</p>	

	<p>needs and goals while providing a path for clients to follow in pursuit of gaining independence and expanding personal enrichment. To further align our staff to these expectations, Service Alternatives has developed and provides training in both Person-Centered Practices and Community Inclusion.</p> <p>Service Alternatives has, within the Training Institute, made focused efforts to ground our training staff to Adult Learning Theories. As the primary audience for our trainings and those who receive our services are adults, it behooves us to make a concentrated effort to ensure that our staff continue their education as they endeavor to educate and serve others. At Service Alternatives, all staff with roles that are considered “up in front--”trainers, facilitators, and certain clinical roles--are expected to take Service Alternatives’ “Training Skills Academy.” Included in the Training Skills Academy are trainings in cultural humility, curriculum development, adult learning theories, and cooperative learning. We require our staff to attend these trainings before submitting them for inclusion as community instructors, training staff, or community members independently. This material covers research-backed principles in adult learning theories, inclusivity in curriculum design for diverse learners, and best practices in creating spaces and activities that facilitate learning outcomes.</p> <p>We value community and maintain a presence throughout the entire state of Washington, providing an economy of scale and ability to rapidly respond to local needs. We also have invested heavily in building person-centered approach to services including active work in operating as a psychologically informed environment. This includes ensuring the company solicits and acts on feedback collected from the clients served by Service Alternatives. To provide a consistent, structured avenue for this feedback to be received, we have developed an Advocate Advisory Council wherein clients we serve regularly meet to discuss the quality of the service they receive and how we can improve. Concrete steps taken from the feedback collected from the Advocate Advisory Council include embedding respect as an explicitly named, core value of the organization. One step taken to demonstrate this respect has been investments and policy changes around improving other language capabilities that align with the clients’ preferred language. We also strongly believe in maintaining quality services, have been CARF accredited for over a decade, and maintain our status as a contracted community instructor for supported living providers. In developing training, we employ international best practices as they relate to instructional design and learning theories. We utilize multiple checkpoints and tools to ensure the training meets learning objectives and maximizes accessibility for participants, including the use of sensitivity reviews and completing a Voluntary Product Accessibility Tool (VPAT). To improve our understanding of Washington’s diverse communities, we have established a Diversity, Inclusion, and Belonging plan in December of 2021. In 2022, we contracted with a third-party, HR Consultant to review our practices in intake, service, recruitment, and operations to ensure equity and inclusion. This work is ongoing as we continue to improve our understanding of Washington’s diverse communities.</p>	
C	Please provide an account of your partnerships, and subcontracted resources, professionals and/or subject matter experts-particularly any consultants with intellectual/developmental disabilities-who specialize in the following fields and	15



	<p>outline any processes around how the bidder engages with these resources in addressing/responding to business needs: person-centered practices, secondary traumatic stress, self-care, customer service, equity, diversity, access and inclusion, cultural competence, cultural humility, de-escalation, co-occurring conditions, safety and orientation, and specific care-providing practices related to supporting individuals with intellectual and/or developmental disabilities.</p>	
	<p>ANSWER:</p> <p>Service Alternatives' experience with providing technical assistance and training for DDA, community providers, families, and staff is described below. As soon as our agency was formed in 1983, we realized we must ensure our staff were properly trained and supported in order to provide excellent services to clients and be fully aligned with our values and philosophy. Thus, our Training Division was established to meet SA's internal staff training needs. Our initial Training Division personnel consisted of two part-time individuals. Over the next thirty five years, as our agency expanded both geographically and our client service contracts diversified, so has our Training Division grown and expanded beyond our internal needs. We now provide training, consultation, and technical assistance to our clients, their natural and foster families, other social service providers, agency (e.g., DDA, DSHS, DVR) field and headquarters personnel, as well as educational, recreational, and corporate entities.</p> <p>Today, <a href="#">Service Alternatives Training Institute</a>, is a well-established training, consultation, and technical assistance entity, with over twenty primary personnel whose credentials include advanced degrees/certifications in such areas as:</p> <ul style="list-style-type: none"> <li>• Social Work</li> <li>• Executive Coaching</li> <li>• Social Psychology</li> <li>• Mental Health Counseling</li> <li>• Education</li> <li>• Human Development</li> <li>• Business Administration</li> <li>• Rehabilitation Counseling</li> </ul> <p>The Developmental Disabilities Administration, its service recipients and their families, and other contractors are our primary Training Institute customers to whom we deliver training, consultation, and technical assistance support. In providing these services, we remain true to those values and philosophical pillars on which our agency was founded: every individual has the right, desire, and ability to lead a productive, full, happy life in their community, and various agencies and individuals who are charged with assisting individuals with developmental disabilities must do everything in their power to remove barriers to such fulfillment for these individuals while building upon their strengths.</p>	

Toward this end, we offer a variety of training topics focused on assisting individuals, their families, and professionals supporting these individuals in identifying and building upon their strengths. We have also successfully offered a variety of life skills training to our clients, their families, and even service providers. These include everything from safety and emergency preparedness training to communication skills, resume building and writing, job-seeking skills, stress management, PATH and other person-centered planning processes, and many other pertinent topics.

We have successfully offered a wide variety of training to DDA and other agency service providers over the past thirty years. Below is a sample of such training topics:

- Residential Services Provider Training, which consists of 40 hours covering a variety of topics
- Developmental Disabilities Specialty Training (DDST)
- Revised Fundamentals of Caregiving
- Seamless and Sustainable Community Integration
- Emotional Intelligence
- Case Management
- RIGHT RESPONSE® crisis safety, de-escalation, and prevention
- American Red Cross First Aid/CPR/AED
- Health and Safety, including Back Care, Hoyer Lifts, etc.
- Crisis Management and Critical Event Response Debriefing
- Leadership
- Bloodborne Pathogens
- Positive Behavior Support
- Dependable Strengths
- Motivational Interviewing
- Abuse Identification & Reporting
- Dual Diagnosis
- Person Centered Planning/PATH
- Autism spectrum conditions
- Prader-Willi Syndrome
- Diabetes
- Suicidality
- Trauma Informed Care
- Community Inclusion

<ul style="list-style-type: none"><li>• Psychological First Aid</li><li>• Psychologically Informed Environments</li><li>• Back Care/Transfers</li><li>• Communication</li><li>• Client Financial Practices</li><li>• Supported Living WAC training, and others</li><li>• Training Skills Academy:<ul style="list-style-type: none"><li>• Dynamic Presentation - learning fundamentals of presentations</li><li>• Deeper Facilitation - learning facilitation and classroom management skills</li><li>• Becoming a Culturally Competent Service Provider - DEI for trainers</li><li>• Curriculum Development - learning curriculum development process and skills</li></ul></li></ul> <p>Our agency also has extensive experience providing a variety of consultation and technical assistance services to DSHS staff, social services provider agencies, law enforcement and educational entities, hospitals, businesses/employers, families, and individuals. Since its inception, Service Alternatives has been known as an agency that is willing to work with individuals who present the most challenging sets of barriers toward community living. We pride ourselves on our reputation in Washington State of being highly responsive, and offering creative and effective solutions to problems which arise in the human services field. For these reasons, various entities contact us regularly with requests for consultation and technical assistance, through both formal (contracted consultation and technical assistance) and informal (pro bono consultation and technical assistance) venues.</p> <p>Some examples of the variety of technical assistance to persons and agencies over the past forty years are:</p> <ul style="list-style-type: none"><li>• person-centered planning</li><li>• case management</li><li>• developing Positive Behavior Support plans</li><li>• locating and utilizing available community supports and resources (both formal and informal)</li><li>• developing community resources for individuals</li><li>• developing agency policies, procedures, and best practice guidelines</li><li>• supporting individuals with disabilities in employment settings</li><li>• developing comprehensive crisis prevention, response, and management systems (SA has had our own highly effective multi-component system of managing critical incidents—SCRIPT: Service Alternatives Critical Event Response, Intervention, and Prevention Team and have assisted other agencies in implementing various parts of this system)</li></ul>	
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D	<p>Provide an outline of the bidder’s experience and/or subject matter expertise with the use and facilitation of virtual platforms, video conferencing resources, and other technology related to remote/telework and virtual facilitation of training programs. Please include any experiences with barriers/challenges with the use of previous and preferred technology resources and the usage analysis conducted to determine preference of current resources. DSHS primarily utilizes Microsoft Teams and Zoom; please specifically address your experience with these two applications in this answer.</p>	15
	<p>ANSWER:</p> <p>In the early days of COVID-19, Service Alternatives Training Institute as a whole was forced to pivot to virtual options immediately. Large state-wide events, like the Person-Centered Planning Symposium and Community Summit, became hybrid events overnight with help from our TA Program.</p> <p>By necessity, our whole team is familiar with hosting trainings, webinars, and meetings on Zoom and Teams. While we were fortunate to have the resources for such pivot, we understand that not all subcontractors and clients had an easy time making the switch from in-person to virtual settings. Some things, even within Service Alternatives, like our RIGHT RESPONSE Instructor Certification Courses, simply could not be conducted virtually, and had to be cancelled. But for those events that could be conducted virtually, our TA staff quickly stepped in to provide hosting support. Since 2020, our team has conducted over 900 virtual events over Zoom, and our internal meetings are held on Teams.</p> <p>When we host an event on Zoom, we can perform a range of tasks on behalf of the trainer or facilitator, including:</p> <ul style="list-style-type: none"> <li>• Fielding questions and comments</li> <li>• Troubleshooting any A/V problems</li> <li>• Creating a waiting room to let a few attendees at a time so the trainer or facilitator is not overwhelmed</li> <li>• Taking attendance and managing registration</li> <li>• Creating breakout rooms and assigning attendees to the correct groups</li> <li>• Hosting up to 1,000 attendees in our Zoom rooms</li> <li>• Creating a hybrid event in which people can attend virtually and in-person</li> <li>• Recording Zoom meetings to distribute to those unable to attend</li> <li>• Downloading the transcript of any Zoom meeting’s comments or questions</li> <li>• Meeting with the trainer or facilitator prior to the event to discuss expectations of what tasks our team will perform and ensure they are comfortable in the virtual environment</li> </ul>	

	<p>Virtual trainings and meetings are now a common occurrence in most workplaces, and while we understand some trainings are better experienced in person, maintaining virtual attendance creates equity for those without childcare or transportation, which is especially important for those located in rural areas. In cases where an in-person interpreter would be needed or even for those who have audio sensory issues, closed captioning can be utilized on Zoom, ensuring all can have a full experience.</p> <p>Barriers and challenges that we have seen creating equity issues, even as Zoom helps to create better access, are the use of digital workbooks in a virtual classroom. Many attendees attempting to follow along with their training handbook only have one screen or device, and cannot engage with the trainer and content with a digital handbook. A few solutions that Service Alternatives has discussed internally include in-person DDST trainings once a month, or mailing the handbook to an attendee prior to class when requested. An in-person class may solve the need for multiple screens, and the mailed handbook may provide better access to someone with only a phone attempting to attend class.</p>	
E	<p>Please describe the bidder’s staffing structure/team currently in place that is responsible for developing, tracking, monitoring and reporting out on details related to budget and finance-specifically as it relates to ongoing budget changes in response to business needs and how transactions are received, processed, recorded, communicated and finalized. Please provide individual job experience for each of your staff members, their years of experience in budget/financial management and monitoring, include the number of dedicated staff assigned to this specific team and the process/protocol the bidder has developed for budget monitoring and tracking. Be sure to include any systems, technology and/or preferred tools the bidder uses to organize, track and report on this category:</p>	10
	<p>ANSWER:          Our Financial Manager, Ali Al-Sadi, is primarily responsible for managing our contract budgets and is supported by Darold Bivens, our Project Coordinator. Their experience and skills can be found on “Exhibit B: TA RFP Staff Resumes”. The Project Coordinator directly works with the Financial Manager to ensure any changes to existing projects, trainings or consultations are recorded correctly.</p> <p>Services Alternatives tracks and manages DDA Technical Assistance budget by using a Financial Report document (see “Exhibit C: Example SA Financial Report”). This spreadsheet tracks each individual request submitted by an authorized DDA requester within the appropriate budget area. Each spreadsheet contains the Total TA Budget for the specific budget category, Total Spent from paid expenses, Total Planned To Be Spent, and the Remaining funds in the budget category.</p>	

	<p>The Total Budget is determined by DDA, but SA monitors the total allocated budget for each category, excluding overhead. Overhead is to be charged at 15% of the total spent per month on DDA services, and consequently will automatically stay within budget due to SA’s monitoring of the Total Budget in the Total Planned and Total Spent fields.</p> <p>To track Total Planned spending, SA enters requests submitted by an authorized DDA requester including a projected budget and the requested subcontractor or trainer. After receiving a request, SA begins coordination with the appropriate subcontractor to determine their availability to complete services. Additionally, SA negotiates an agreed-upon rate within the projected budget, and any additional expenses when applicable including the State Office of Financial Management (OFM) guidelines for travel expenses, supply costs, etc.</p> <p>Upon finalizing the scope of work with the requested subcontractor, SA begins tracking the requested budget by entering the request into the Financial Report and listing the event name, subcontractor, DDA requester, and allocated budget. When the subcontractor has rendered services that are deemed acceptable by both DDA and SA, SA pays the subcontractor. These payments are tracked in the Total Spent field. To ensure SA does not exceed the total budget of a given DDA budget category, The Total Planned and Total Spent fields are automatically subtracted from the Total TA Budget field which generates the Remaining budget.</p> <p>This Financial Report is shared with each Region, as well as primary stakeholders, on a quarterly basis.</p>	
<b>DESIRED EXPERIENCE AND QUALIFICATIONS</b>		<b>30 pts</b>
H	<p>Quality customer service is central to this work. Please describe your organization’s approach to customer service and any tools/systems/portals/etc. you utilize to streamline and maintain high quality customer service. Include your organization’s approach to maintaining customer service during times of staff turnover, or other unforeseen staffing issues.</p>	10
	<p><b>ANSWER:</b></p> <p>Service Alternatives takes pride in our values of Customer Service and Excellence. Naturally, when we began our work with DDA in 2011, these values informed every aspect of our work. Even with the transition to a new Program Administrator, Project Coordinator, Office Assistance, and the appointment of a Financial Manager, our work has been consistently excellent, timely, and performed in a way that is fiscally responsible. This speaks to the effectiveness of our tools, processes, and the skills of our team.</p> <p>As we continue to grow as an organization, we retain team members with vast experience in deliverables outlined in the contract, and some are new to the work, and to SA. Regardless of background, all of our staff are united by our shared</p>	

	<p>values of excellence and respect, especially in our delivery of customer service. As TA continues to coordinate more events and the scope of our contact with DDA expands, our multiple established systems and tools had to be developed or adapted to manage the influx of work.</p> <p>Some of these expansions have been a direct result of a change in need: during the pandemic, many of our services and trainings were transformed to fit into a virtual environment, many of them immediately. We believe it is a true testament to our customer service that we were able to work with providers, agencies, and sole proprietors to keep delivering necessary and enriching services.</p> <p>Despite our new growth in an ever-changing environment and expansion of the contract, our commitments remain the same: we reply to customers in a timely manner, provide a resource guide that covers our extensive pool of subcontractors and what they specialize in, and continue to network with providers to find excellent subcontractors who perform invaluable work for our community. When a requester doesn't have a provider in mind for a needed service, we work together to find the best fit for the job. Once a provider is identified, we start to coordinate approved travel and lodging those performing services, and document activity in the Quarterly Report delivered to the DDA HQ Contracts Monitor.</p>	
I	<p>Please describe your method for assuring that your services and deliverables are provided in accordance with high quality standards and for immediately correcting any deficiencies. What data would you propose to report to DSHS which would permit verification of your quality assurance activity, findings and actions?</p>	10
	<p>ANSWER:</p> <p>Our Technical Assistance Program will commit to the following actions to ensure services and deliverables and provided in accordance with high quality standards by the following methods:</p> <p><b>Internally:</b></p> <ul style="list-style-type: none"> <li>• Ensuring on a bi-weekly basis that all contractors have updated paperwork and certificates, including insurance policies, background checks and all applicable certifications</li> <li>• Conducting an internal Quality Assurance check of events and subcontractor files 2-4 times per year</li> <li>• Submitting evaluations to attendees of all applicable events for constructive feedback and to assess the services of the subcontractor providing delivery. Should the event score lower than a 90% prompts our team to follow up with the provider and participants</li> </ul> <p><b>Data to report to DSHS:</b></p> <ul style="list-style-type: none"> <li>• Deliver Quarterly Reports of the budget to contract monitor on a monthly basis</li> <li>• Coordinating with correct contacts around areas where the budget is either over or underspent to correct course</li> </ul>	

	<ul style="list-style-type: none"> <li>• Providing DDST Trainings with our internal staff and coordinating with DDA to ensure certificates are issued correctly, monitor testing, and ensure all scoring is completed in a timely manner, and ensure the curriculum is up-to-date</li> <li>• Compile and deliver an Annual Report to DSHS of all events and trainings</li> </ul>	
J	<p>Please describe the measures you employ to assure that your services and deliverables are provided in a cost effective manner that is consistent with quality outcomes and fair employment practices.</p>	10
	<p>ANSWER:</p> <p>Whether a TA Request is fulfilled by Service Alternatives Employees or subcontractors, before any work can begin, the requester and our TA team confer to determine a pre-determined budget, which is then outlined on the TA Request, which also prices in our overhead costs.</p> <p>Once the TA Request is approved, if the work is performed by SA staff, we proceed with the work, and inform all involved in the project of their outlined budget. If the work is to be performed by a subcontractor, a Statement of Work (SOW) is drafted and signed by both the subcontractor and the TA Administrator. The subcontractor is expected to adhere to the expectations laid out by the SOW, including how often they may bill, what insurance they are required to maintain during this work, and whether or not evaluations will need to be completed. Most importantly, the work cannot begin without an executed SOW, nor is the subcontractor permitted to exceed the total amount agreed to for the work.</p> <p>Our subcontractors all establish their own rate, and are free to adjust it as necessary according to the nature of the work; this allows subcontractors to be paid fairly, create a schedule of deliverables that is manageable and reasonable for them, and meets DDA’s expectations. Given the recent spike in inflation and cost of living, this provides subcontractors with the opportunity to examine their rates and determine their viability.</p> <p>The only instances in which there is a change to the budget is when the customer agrees that there will need to be more work done, or more funds allocated to the project—the work and the payment previously agreed upon within the SOW will never change without explicit approval in writing from our client.</p> <p>This creates an environment in which our customers are fully aware before work begins how much will be spent on the project, and what the deduction from the budget will be. Because our team tracks planned spending, even events that have not yet been completed are accounted for in the overall budget, helping our customers track what remains of their budget without confusion.</p>	



6	BIDDER'S SOLUTION AND PROPOSED APPROACH (TECHNICAL RESPONSE)	MAXIMUM TOTAL POINTS: 100
A	<p>Please provide a proposed approach to incorporating the Developmental Disabilities Administration's mission, vision, and values (as listed below) for each SOW Exhibit, A-H, as found in Attachment A: Sample Contract to this RFP.</p> <p>DDA's Mission, Vision, and Values:</p> <ul style="list-style-type: none"> <li>• Mission: Transforming lives by providing support and fostering partnerships that empower people to live the lives they want.</li> <li>• Vision: Support individuals by continually improving and individualizing supports, building support plans based on needs, and engaging individuals and families.</li> <li>• Values: Respect, Person-Centered Planning, Partnerships, Community Participation</li> </ul>	10
	<p>ANSWER:</p> <p>Service Alternatives is a values-based organization, therefore, all the work we perform is grounded in our values of Community, Integrity, Excellence, Customer Service, Fiscal Responsibility, Employee Satisfaction, and Respect, our most recent addition to our values. While respect is generally something valued in any workplace, our shift towards a Psychologically Informed Environment and our dedication to keeping our clients a part of the conversation around their care prompted SA to include Respect as a named value.</p> <p>For four decades, we have provided support services to individuals with intellectual and developmental disabilities throughout Washington State. Having worked with DDA and its previous iterations in partnership as long as we have existed as a company, we are highly cognizant of its mission, values, and guiding values being in full alignment with our own guiding principles. Because DDA's values reflect our own values, we automatically incorporate them in our work. Our CEO, Belinda Kindschi, also participated in the workgroup to update the DDA guiding values, which further informed us of how to further align our organizational values with DDA.</p> <p>When Service Alternatives was awarded the Technical Assistance contract in July of 2011, we started onboarding subcontractors, and quickly found that our most fruitful partnerships were with those who also embody DDA's values. In our experience of having facilitated over 4,300 various TA events over the past twelve years, there are two ways in which we match subcontractors from the available pool of about 200 with the requests for service: (1) when a TA request arrives from DDA, it may already identify a specific contractor they would like to see utilized for this work or (2) SA selects a provider following an assessment of how the request could be best addressed.</p>	

	<p>In the first scenario, it has been our experience that these professionals have had a long-standing relationship with DDA and would, therefore, deliver services in alignment with DDA’s values, mission and vision. When SA is in the position of selecting a subject matter expert, besides evaluating their level of expertise, we consider their professional reputation (through social media vetting, reference checking, etc.) and then consult with them about how they are planning to deliver the service. This process allows us to determine whether the work they do will be grounded in DDA’s values.</p> <p>At the closing of a TA event, we review the feedback from the stakeholders; training participants, residential support staff, DDA case managers, employment support staff, persons requesting the service, etc. If there are concerns raised which indicate the service may not have been in alignment with DDA values (e.g., the consultant not respecting the individual’s choice and not being person-centered), we would have a conversation with the service provider to discuss the feedback and to get a more complete picture of what transpired. If it appears as though a consultant’s philosophy is incongruent with our shared values, we would initiative a conversation with the appropriate persons in DDA to come to a unified decision about continuing to contract with that person or entity.</p> <p>This methodology has been proven effective for consistent, values-driven service in all our work and would be applied to each described area in the statements of work in the sample contract. One sample of our highly successful method of incorporating DDA’s values, vision, and mission into the work done under the Technical Assistance Contract has been the expansion of including Advocates (individuals with developmental disabilities who can speak directly to their experience of having a disability and interacting with the service delivery system) in delivering the services under the Statement of Work in the TA contract. When Service Alternatives was first awarded this contract, the use of self-advocates was rather sporadic. Having seen the great value and effectiveness of including advocates in providing training and technical assistance, we made an unrelenting commitment to promoting this practice. For example, currently, every one of the nearly 100 yearly Developmental Disabilities Specialty Training (DDST) sessions offered throughout Washington State includes an advocate who partners with a DDST trainer.</p>	
B	<p>What technical assistance processes do you have in place to respond to requests from DDA HQ, Regional Management and Field Services to subcontract with subject matter experts for training and services, event planning and technical assistance?</p>	10
	<p>ANSWER:                  Even before an official technical assistance (TA) request is articulated by DDA, we provide consultation and brainstorm possible options for meeting the clients’ needs. For example, a rather common service inquiry we receive is when an individual with behavioral challenges finds themselves at risk of losing their home. In this scenario, a Performance Quality Improvement (PQI) staff would contact us, present the challenge—this is usually quite urgent—and ask for possible solution ideas. We would then review our consultant directory and consider the best provider of services to meet the needs of the</p>	

	<p>individual and connect them with the necessary supports to allow them to stay in their home, while minimizing the fiscal impact.</p> <p>To officially address service requests, the process we have honed over the past 12 years in partnership with DDA is as follows:</p> <ol style="list-style-type: none"> <li>1. DDA emails a TA request (TAR) to the Service Alternatives TA Project Coordinator (please see “Exhibit D: TA Request”).</li> <li>2. Service Alternatives researches potential contractors, costs, and timeline, then reports back to DDA within 24 hours.</li> <li>3. DDA sends an authorized TAR outlining the services and the official budget back to SA TA Project Coordinator via email.</li> <li>4. Information in the authorized TAR is verified by Service Alternatives and entered into TA database and fiscal tracking document (please see “Exhibit C: Example SA Financial Report”)</li> <li>5. Using the completed TAR, Service Alternatives writes a Statement of Work (SoW) for the contractor, outlining the services to be provided, including documentation/reporting expectations and financial logistics of the training/consultation (please see “Exhibit E: Statement of Work”)</li> <li>6. Once the SoW has been sent to the contractor, Service Alternatives fills out the bottom of the TAR and emails a copy of it to the requester and the authorizer. This communicates to DDA that Service Alternatives has made the necessary arrangements and authorized the provider to deliver the requested services.</li> <li>7. This process has proven to be very effective in ensuring TA requests get addressed promptly and efficiently. It is an outcome of us working together with DDA in our initial years after obtaining the DDA contract, and in trying several different processes and forms, finally arriving at the current iteration. This, of course, does not mean we have stopped listening to our customers; if a better process is identified in the future, we would gladly adopt it.</li> </ol>	
D	<p>Please describe in detail the bidder’s strategic approach to budget and fiscal management; specifically, how the bidder compiles invoices, receipts, statements of work, agreements, transactions etc. and reconciles them with existing or proposed budget amounts. Please include how the bidder responds to requests for changes and/or adjustments to initial purchases/procurements and include any policies and/or standard operating protocols for communicating and tracking these exchanges with the customer and ensuring all relevant parties are updated on progress and finalization with transactions.</p> <p><i>Please include the process on how your firm determines costs associated with overhead expenses, trainer fee schedules, and trainer expenses.</i></p>	10

ANSWER:

Considering the incredible growth of our TA program in the last decade, we created a position for a Financial Manager, who oversees Budget Management and Reporting. During a monthly meeting, our Financial Manager and TA team meet with key parties within DDA to review all categories in our budget to review what funds have been allocated for future projects, what has already been spent, and what is left for unplanned spending. While our Financial Manager is key to managing this budget, the whole of our TA team is involved in monitoring event spending and ensuring that events are billed to the correct categories. This allows us to review the budget to determine what areas can plan for bigger projects, trainings or consultations, and which are on track to utilize most or all of their budget for the fiscal year.

Any changes to an event’s budget are submitted in writing to the TA team, and after they are approved by the requester and the TA Administrator, the changes are recorded on the Statement of Work (SoW) or the TA Request. The new amounts are then updated on our Quarterly Report, and the overall budget of that area reflects those changes.

When the change significantly impacts the total funds left in that category, the TA team coordinates with the point-person for that area’s TA budget to plan future spending or any changes that need to be made in planned events. We have also demonstrated successful experience in managing and reporting on the service specific program budgets within the identified parameters as follows:

1. Developing a Fiscal Year budget for each service based upon funding identified by DDA and then submitting for approval by DDA HQ Contract Monitor, designee or program representative.
2. Sending the Quarterly Regional budgets to each Region.
3. Reviewing the monthly bill submitted to DDA with our Director of Training, Quality, Compliance and Development Administrator, and our Financial Manager to ensure our accounting is correct
4. Maintaining a master evaluation database of participant training evaluations to include the required information for the trainers, consultants and event planners and developing a complete summary of all activities arranged for or conducted by Contractor at the end of fiscal year (please see pages 4 and 5 of “Exhibit J, SA Annual Report 2022”).

When an event has concluded and the provider has completed their work (and reimbursements, if applicable) laid out in their SoW, they will then submit their invoice to our invoice portal [here](#). Our Financial Manager will then review the invoice to confirm it matches the work stated on the SoW, and then prepare it for the TA Administrator’s approval. Once the invoice is authorized for payment by the TA Administrator and Director of Training, the Financial Manager delivers the approved invoices to the Training Institute’s Administrative Assistant, who will remit payment to the subcontractor. Payment will go out to subcontractor in no more than 30 days from the date their invoice was received (provided all other contracting documentation requirements are met).

E	<p>Provide an example of your firm’s ability to analyze participant evaluations of training/events and trainer ability and how to incorporate the quantitative and qualitative summaries into reports:</p>	10
	<p>ANSWER:</p> <p>SA requires all subcontractors to distribute, collect, and submit evaluation forms for services rendered. To collect the most accurate data for the various services requested by DDA, contractors are provided the following four evaluation forms to best solicit participant feedback:</p> <ul style="list-style-type: none"> <li>• SA Training Evaluation Form (please see "Exhibit F: Training Evaluation Form")</li> <li>• SA Consultation Evaluation Form (please see "Exhibit G: Consultation Evaluation Form")</li> <li>• SA Facilitation Evaluation Form (please see "Exhibit H: Facilitation Evaluation Form")</li> <li>• SA Research and Development Evaluation Form (please see "Exhibit I: SA R &amp; D Evaluation Form")</li> <li>• SA Annual Report (see "Exhibit J: SA Annual Report 2022")</li> </ul> <p>The questions on each form aim to collect information pertinent to the services provided. Upon receiving completed evaluations from subcontractors, SA corresponds the evaluation or set of evaluations to a previously created event in our internal database.</p> <p>The evaluations are then entered into the database in their corresponding event file. After all evaluations are entered into an event, a report is generated (please see "Exhibit K: Event Report Summary"). This report includes quantitative data collected with the averages for each quantitative question. Qualitative answers are organized in bullet points under their corresponding question. The report is submitted electronically to the requestor and provider of the services. The reports are retained in our proprietary database and are reviewed regularly by our TA Administrator to develop a profile of each contractor’s performance. If any concerning information is gleaned from the evaluations of services, we discuss this with the authorizer and provider of services.</p>	
F	<p>Describe in detail the ability and experience of your firm’s staff to manage the deliverables described in Attachment A: Sample Contract. Please include your firm’s demonstrated ability to coordinate schedules of your own staff or identified subcontractors utilized in support of said deliverables, including training, technical support, and design/coordination/planning of conference and other large-scale events:</p>	10

	<p><i>Please include an example of your firm's ability to coordinate travel, lodging, schedules, and other requirements of the trainers who are completing requested tasks and events.</i></p>	
	<p>ANSWER:          When Service Alternatives was awarded the TA contract in July 2011, our organization and team members had vast experience with some deliverables outlined in that contract, and some were new to us. Similarly, we had multiple proven systems in place to facilitate successful implementation of the Statement of Work; many systems and tools have since been developed or adapted as we acquired more experience and as the service scope of the contract expanded. Over the past year, our team has changed (we have a new TA Administrator, Project Coordinator and Office Assistant) but the quality of our work has not.</p> <p>In that time, we have coordinated the delivery of over 4,300 events. These events included:</p> <ul style="list-style-type: none"> <li>• venue, catering, equipment, and supplies coordination</li> <li>• community-based trainings on a variety of topics</li> <li>• provider-specific staff training</li> <li>• workshops</li> <li>• graphic design</li> <li>• web development</li> <li>• American Sign Language Interpretation</li> <li>• meeting facilitation</li> <li>• conferences</li> <li>• surveys</li> <li>• hosting events</li> <li>• videography</li> <li>• curriculum development</li> <li>• grief counseling and debriefing supports</li> <li>• symposia</li> <li>• coordinate large-scale projects and initiatives to better support clientele through the development of new systems and supports in the community</li> <li>• communication assessments and recommendations</li> <li>• functional assessments and positive behavior support plan development and follow-up</li> <li>• other types of consultation</li> </ul>	

<p>Recipients of these services included:</p> <ul style="list-style-type: none"><li>• DSHS and DDA staff</li><li>• Families of clients</li><li>• Individuals in community placements who receive services, or those who are transitioning out of institutions into the community</li><li>• Community residential providers</li><li>• Community employment providers</li><li>• County staff</li></ul> <p><b>Budget Management and Reporting:</b></p> <p>We have demonstrated successful experience in managing and reporting on the service specific program budgets within the identified parameters as follows:</p> <ul style="list-style-type: none"><li>• Developing a Fiscal Year budget for each service based upon funding identified by DDA and then submitting for approval by DDA HQ Contract Monitor, designee or program representative</li><li>• Meeting quarterly in-person with the DDA HQ Contract Monitor to discuss most recent spreadsheet and report depicting the budgeted amount for that Quarter</li><li>• Sending the Quarterly Regional budgets to each Region</li><li>• Maintaining a master evaluation database of participant training evaluations to include the required information for the trainers, consultants and event planners and developing a complete summary of all activities arranged for or conducted by Contractor at the end of fiscal year (please see pages 4 and 5 of “Exhibit J: SA Annual Report”)</li></ul> <p><b>Technical Assistance and Training:</b></p> <p>We have been providing technical assistance and training as outlined in the TA contract for the past decade years, coordinating over 300 events yearly. Our experience includes:</p> <ul style="list-style-type: none"><li>• Responding within three business days to requests from Regional DDA staff</li><li>• Matching requests with trainers, consultants and event planners who are qualified, appropriate and meet contractual standards to complete the event requested by the regional staff, while valuing fiscal responsibility.</li><li>• Coordinating and scheduling all approved travel and lodging for trainers, consultants and event planners, and documenting the activity in the quarterly report submitted in writing to the DDA HQ Contract Monitor</li><li>• Facilitating the required evaluation data collection for each event</li></ul>	
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	<ul style="list-style-type: none"> <li>Maintaining a subject matter expert (SME) database of trainers, consultants and event planners and areas of specialty, availability, extent of geographic outreach, to be updated quarterly and circulated to identified DDA Regional and DDA HQ Contracts Monitor (please see “Exhibit L: Service Alternatives Technical Assistance Resource Guide”)</li> </ul>	
I	<p>Please provide an account of the bidder’s experience and/or a list of bidder’s subcontractors who specialize in dispute resolution and/or mediation. Include the individual names of the providers/companies on staff or subcontracted, their years of experience in this work and any documentation related to certification, degrees and/or accreditation for indicated parties:</p>	10
	<p>ANSWER:</p> <p>In 2014, the Aging and Long-Term Support Administration (AL TSA) Dispute Resolution Meeting Facilitation was added as a component of the DDA TA contract. To fulfill the services in this category, Service Alternatives has been contracting with the Center for Dialog and Resolution to:</p> <ul style="list-style-type: none"> <li>Participate in planning meetings with Program staff</li> <li>Assist program staff with the design, structure and format of the meeting. For serial meetings, strategically organize the content and plan the series of meetings in a sequence designed to achieve the desired objective or deliverable within the required timeframe and track key issues from meeting to meeting</li> <li>Prepare agendas and materials in advance of meetings</li> <li>Design participatory activities for the meetings</li> <li>Support staff to prepare and have materials ready in advance of the meetings; ensure space set up and room organization is conducive to the purpose of the meeting</li> <li>Provide direct meeting facilitation following agenda and timelines prepared in advance of the meeting</li> <li>At the Department’s request, provide minutes or other written meeting products including a record of flip chart or white board notes recorded during the meeting</li> <li>Participate in post meeting debriefing and planning</li> <li>At the Department’s request, design, organize, edit and produce final reports or other written deliverables within the required timeframe</li> <li>Provide training on meeting facilitation, effective communication and meeting management</li> </ul>	



	<p>Service Alternatives has been facilitating the subcontracting process through the articulation of a Statement of Work at the beginning of each fiscal year and processing invoices and payments on a monthly basis, while monitoring the overall budget.</p> <p>Additionally, one of our team members, Sandra Cohen, (see “Exhibit B: TA RFP Staff Resumes” for resume) possesses a Dispute Resolution Certification based on a 40-hour course of study covering the eight-stage mediation model, conflict theory and styles, mediator communication skills, and principles of conflict resolution. In the twenty years following this certification, Sandra has had an opportunity to facilitate multiple mediation processes for teams.</p>	
J	<p>Provide an example of your firm’s ability to market, design schedules, coordinate planning efforts, register, conclude and document satisfaction as outlined in the project scope. Please include your firm’s experience with registration platforms like Eventbrite, Training Assistance Request environments, and use of evaluation/survey programs</p>	10
	<p>ANSWER:</p> <p>When DDA requests that we handle the scheduling and marketing of an event, we work with all parties to find a budget and schedule that best meets stakeholders’ needs. Every request starts with a TA Request (see “Exhibit D: TA Request”) through our <a href="#">TAR Proposal portal</a>. Once the proposal has been submitted our Project Coordinator and TA Administrator work with the requester to ensure that all details are correct and confirm any missing information or requirements.</p> <p>Our Project Coordinator then requests approval from both the requester and the TA Administrator. Once the TAR is approved by all parties, it is entered into our internal database, and our Project Coordinator begins finalizing details around catering, applicable venue reservations, virtual hosting needs and provider availability and coordination.</p> <p>Some training events that are completely virtual merely require confirming a trainer’s availability and creating a Zoom link, and track registration through Eventbrite, and other events require more coordination and planning.</p> <p>Our most recent example of this more complex level of coordination is the 2023 Person-Centered-Planning Symposium. To ensure success of these events, Service Alternatives:</p> <ul style="list-style-type: none"> <li>• Worked with Symposium facilitators and DDA to determine initial budget</li> <li>• Designed and distributed event flyer through DDA and SA networks</li> <li>• Researched venues on the west side of the state</li> <li>• Reviewed breakfast/lunch options at each location with multiple dietary options</li> </ul>	

	<ul style="list-style-type: none"> <li>• After determining the venue, toured the event area and worked with onsite event coordinators, including arranging for live musicians and set up of décor in the event room</li> <li>• Arranged room stipends with the hotel for attendees</li> <li>• Once date and location were confirmed, worked with PCP symposium committee and facilitator to determine what materials were needed, and the agenda for each day</li> <li>• Managed registration through Eventbrite, both for the in-person and virtual attendance options</li> <li>• Coordinated with AV provider to ensure presentation, visuals and audio were set up for delivery</li> <li>• Travelled to each event to host each day and support trainers as needed</li> <li>• Collaborated with DDA to find solutions when the keynote speaker was indisposed</li> <li>• Provided virtual access to the first hour of the symposium for keynote portion</li> <li>• Obtained all materials and coordinated room set up and tear down with venue</li> <li>• Distributed/collected evaluation feedback from in-person and virtual attendees</li> <li>• Debriefed with DDA and symposium facilitators to determine what could be improved</li> </ul> <p>Other details that have to be addressed for most of our events include monitoring Eventbrite to ensure all relevant details are present, no duplicate names are registered for the event, that capacity is not over the maximum amount, location of the training, and any pre-work that should be completed prior to the event or training.</p> <p>Our Project Coordinator will regularly meet with clients in the case of larger events, to ensure that registration is proceeding as expected, tweaking details about the event as necessary, and sending follow-up notices before and after the event, including a digital evaluation if attendees were unable to complete the form at the in-person event.</p>	
K	<p>For the Supported Employment and Community Inclusion trainings, describe your firm’s understanding of the following:</p> <ul style="list-style-type: none"> <li>A. Employment First</li> <li>B. School to Work</li> <li>C. Community Inclusion</li> <li>D. Social Security, Benefits Planning and Work Incentives</li> <li>E. System Navigation</li> </ul>	10
	<p>ANSWER:</p> <p>a: Employment First:        Service Alternatives has been a provider of community and employment services for individuals with various barriers to employment, including developmental disabilities, since 1995. At that time, most people with intellectual disabilities were either not employed or working in various segregated settings. In light of our commitment to our value of Community, Service Alternatives made an unrelenting commitment to employment-first philosophy. We refused to accept the</p>	

<p>predominant culture of automatically placing individuals with developmental disabilities into sheltered workshops or the common practice of ignoring individual strengths, needs, and preferences by channeling people into stereotypical types of work and settings.</p> <p>Service Alternatives actualized the philosophy of Employment First through delivering truly person-centered services to our ES clients. Our clients have always led their service planning and implementation, and Service Alternatives Employment Specialists honor each client’s strengths, preferences, experiences, and needs. When the 2012 Employment First legislation was adopted in Washington State, we were ready and excited for this transition. Furthermore, as an established leader in providing these services, we were able to support and train other employment service providers in complying with the new legislative guidelines.</p> <p>B: School To Work:</p> <p>Service Alternatives ES specialists has been involved in directly providing S2W services as well as coordinating their delivery for nearly 30 years through its multiple iterations. We are familiar with the service’s goals, philosophy, and parameters. Recently, with the changes in who is providing these services as well as how they are delivered, Service Alternatives has continued its involvement with S2W through partnering with school districts, counties, and individuals in an effort to support students through their transition from school to community-integrated employment.</p> <p>C: Community Inclusion:</p> <p>As a provider of various support services to people with developmental disabilities since 1983, Service Alternatives has navigated the changing landscape of philosophy and legislation surrounding people with disabilities’ inclusion in their communities. As other service providers of that era, we began with supporting our clients in Community Access, which did not offer clients opportunities to contribute that were meaningful or fulfilling.</p> <p>We have always advocated for Community Access clients to consider the possibility of meaningful, individualized employment. It has been our experience that when people with developmental disabilities and their circles of support were well informed about vocational opportunities, they would often choose Supported Employment, which allowed us to facilitate their right to integrated, gainful employment. As the Working Age Adult Policy was implemented in 2006, we found ourselves in the position of guiding and supporting other service providers in integrating this philosophy into their community services.</p> <p>As the Community Access service morphed into Community Inclusion starting in 2016, Service Alternatives continued to be the provider of this service in 10 counties throughout Washington State. Consistent with our firm belief that DSPs must be properly supported and trained in their work, Service Alternatives has recently revised and expanded our training focused on meaningful community inclusion. As always, any training resources available within Service Alternatives are available to other providers.</p>	
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	<p>D-E: Social Security, Benefits Planning and Work Incentives; System Navigation:          Clients receiving employment services and their families experience a variety of challenges navigating the systems designed to provide them with opportunities to contribute to their community. While all the components of this complex system are designed to be helpful and supportive, navigating them can become a barrier without a seasoned guide.</p> <p>Service Alternatives Employment Specialists have supported nearly 19,000 clients in the past 40 years. Their role requires knowledge of multiple types and levels of support available to individuals on the state and federal level. The most commonly utilized resources include Social Security, Medicaid, childcare, EBT, insurance, housing assistance, transportation assistance, training and educational supports, and various community resources such as Salvation Army. Both overall eligibility and the level of available benefits from each of the resources can be impacted by gainful employment.</p> <p>Without proper and expert Benefits Planning, an individual’s livelihood can be irreparably negatively impacted. The situation is further exacerbated by the fact that our communities have lost the funding for such resources. Service providers are required to manage benefits planning for our clients with limited access to competent training and certification. Service Alternatives has developed the resources within our organization and with the expected growth, we will be able to support other service providers in this area.</p> <p>Employers in Washington State are also likely to experience challenges in navigating the system of supports, incentives, and bureaucracy associated with employing people with barriers to traditional employment. This disproportionately affects smaller businesses, which do not typically have well-developed human resources entities. Service Alternatives has vast experience in guiding these employers through these cumbersome and time-sensitive systems by training hiring authorities to learn the intricacies of the process. Once businesses experience both the tangible and non-tangible benefits of employing a person with a disability, they are not only contributing to workplace integration, but to broader inclusion. Since small locally owned businesses are usually the heart of their communities, by becoming the champions of inclusivity, they are moving us toward economically healthy and equitable societies.</p>	
O	<p>Provide an example of how your firm would communicate with a customer’s primary point of contact (in this case, the Contract Monitor, or designee) in order to design, arrange for, conduct and/or subcontract for any activities, training or technical assistance in response to an emergent event. Please include protocols related to response deadlines, processes in place for follow-up and coordination, and auditing any requests</p>	10
	<p>ANSWER:          When working with the contract monitor or designee to coordinate an emergent event, we start by performing a needs assessment, gathering all necessary details and asking pertinent questions to determine the best course of action. We work</p>	

	<p>with the contract monitor by suggesting any available options; while the process is a partnership, and we are and asking for their input, thoughts and insight, we leave the ultimate decision up to the contract monitor.</p> <p>Once a course of action has been determined, we reach out to the potential contractor for their availability and interest, and provide the contract monitor with a projected estimated budget, including consultant fee and travel expenses if applicable. Once this information is established, the contract monitor can send a TA request to be authorized in a timely manner. Once the TAR is authorized, we immediately draft a Statement of Work for the contractor and deliver it for their signature. If it is an internal resource that is identified, we work with that individual to coordinate services.</p> <p>Over the past decade, we have responded to multiple (over 20) highly emergent requests, mostly focused around the impact of client deaths on the people who support them. In response to these requests, we have coordinated grief counseling services or delivered critical incident stress debriefing services within several days of the request, sometimes within 24 hours.</p> <p>Another example of a facilitated, emergent event can be seen when our contract monitor approached us with a need for a skilled facilitator to aid an internal leadership team in developing a new social contract and navigate team dynamic misalignments. In this case we were able to coordinate services utilizing our own internal resources by using our Master Coach of Executive Development. As work began, it became apparent that continued consultation and facilitation was needed, as staffing changes shifted the team’s needs.</p>	
P	<p>Please provide an overview of the bidder’s vetting process as it relates to subcontracting with consultants, professionals and/or other subject matter experts who provide unique services and/or certifications in a field of interest (i.e., person-centered approaches, providing care for individuals experiencing I/DD, mediation, trauma-informed care, equity, diversity, access and inclusion, etc.). In the event that a subcontractor is negligent and/or noncompliant with expectations around contracting, delivering quality products, lack of professionalism or encountering conflict, please describe the bidder’s process for addressing these concerns and employing solution-based approaches to settling issues while prioritizing and meeting customer needs/expectations.</p>	10
	<p>ANSWER:                  When Service Alternatives starts the process of onboarding a new subcontractor, our first task is to verify that Service Alternatives’ values align with the party in question. As SA’s values are very closely aligned with DDA’s, this serves as an assessment of the subcontractor’s character, or if they are an agency, if their mission is to serve our mutual clients with the same dedication and respect we have come to expect from our cohort of established subcontractors. Once an initial interview has been completed, and SA is comfortable moving forward in partnership, our Project Coordinator sends a comprehensive list of all documents that will need to be submitted to start doing work on behalf of DDA.</p>	

	<p>This list includes:</p> <ul style="list-style-type: none"> <li>• The Service Alternatives Contractor Intake Form (“Exhibit M”)</li> <li>• A Background check authorization</li> <li>• Professional Liability and Commercial insurance in the amount of \$1,000,000</li> <li>• Service Alternatives Base Contract (“Exhibit N”)</li> <li>• The DDA Contract Addendum (“Exhibit O”)</li> <li>• A Washington State Business License</li> <li>• W-9</li> <li>• Any other applicable certifications</li> </ul> <p>Once a subcontractor has passed a background check and submitted all the appropriate paperwork, we can begin to advertise their services to different contacts at DDA to see if they are a good fit for upcoming work. Because a subcontractor’s work will be dictated by the terms laid out in the Statement of Work they review and sign prior to beginning work on their event, training or project, should the subcontractor violate the terms of that agreement, we are empowered to take action to either remedy the error, or, in extreme cases, end our relationship with the contractor.</p> <p>When there is a complaint against a subcontractor, our role is to gather all the information possible about the incident in question from DDA, and then meet together as an internal team to determine what questions need to be asked of the contractor.</p> <p>When we have a response outlined for the subcontractor, we will then meet separately with the subcontractor in order to gather information from them. In these meetings we hope to ascertain whether their expectations of the work were incorrect, if they made an honest mistake in delivering services, or if they were missing critical information needed to perform the work. Depending on their response, our TA team will make a determination regarding whether or not it is possible to continue the relationship, as well as report back to the DDA team to inform them of what we have learned.</p> <p>While it is our sincere hope that no one we partner with violates their contracts or behaves inappropriately, we firmly believe all of this documentation, along with our initial interviews and ongoing relationships with our subcontractors, will protect both Service Alternatives and DDA from having to pay for incomplete or unacceptable work.</p>	

<b>7</b>	<b>BIDDER’S PROPOSED PRICING (QUOTATION OR COST RESPONSE)</b>	<b>MAXIMUM TOTAL POINTS: 50</b>
A	Please identify all allocated costs, together with the total charges Bidder is willing to accept in consideration of the full performance of the Contract. Bidders should utilize the table below to identify all costs.	
	TOTAL MAXIMUM BID AMOUNT: \$ 3,200,000	

Category	Description/Allocation	Amount per State Fiscal Year
<b><u>Exhibit A: ALTSA Dispute Resolution - Meeting Facilitation</u></b>		
	TBI Meetings / Coordinator Support / Consultation /Facilitation Combined Time and Materials  Total 425 hours	\$163,625
	<b><u>Total for Services under Exhibit A:</u></b>	<b>\$163,625</b>
<b><u>Exhibit B: Field Services</u></b>		
<b><u>Technical Assistance Training and Consultation</u></b>		
	Field Services Core Training	\$44,000
	Field Services Academies	\$19,800
	Self-Advocate Consultation & Collaboration	\$16,500
	<b>Sub Total: \$80,300</b>	

<b><u>Regional Technical Assistance, Training, and Continuing Education</u></b>		
	Region 1	\$49,500
	Region 2	\$74,800
	Region 3	\$62,700
	<b>Sub Total: \$187,000</b>	
	<b><u>Total for Services under Exhibit B:</u></b>	<b>\$267,300</b>
<b><u>Exhibit C: Provider Training Technical Assistance and Support</u></b>		
Supported Living & Provider Trainings	Required seventy (70) hour train the trainer & updating curriculum & new training series continuing education	\$165,000
Specialty training	Manage and coordinate subcontracting with Approved DD Specialty Trainers. Coordinate scheduling to training, training materials, training venue, technical support, training evaluation, participant records and completion certificates	\$192,500
SOLA	SOLA	\$77,000
	Printed materials	\$6,600
	<b><u>Total for Services under Exhibit C:</u></b>	<b>\$441,100</b>
<b><u>Exhibit D: Supported Employment and Inclusion Training</u></b>		
	<b><u>Total for Services under Exhibit D:</u></b>	<b>\$55,000</b>
<b><u>Exhibit E: DDA Roads to Community Living</u></b>		



	Technical Assistance	\$110,000
	Reinvestment	\$968,000
	<b>Total for Services under Exhibit E:</b>	<b>\$1,078,000</b>
<b><u>Exhibit F: Preadmission Screening and Resident Review (PASRR)</u></b>		
	Trainings and Technical Assistance	\$110,000
	<b>Total for Services under Exhibit F:</b>	<b>\$110,000</b>
<b><u>Exhibit G: Emergent Critical Trainings</u></b>		
	Emergent and critical trainings	\$4,400
	HQ Academy and other Academies	\$110,000
	Materials and Printing	\$5,500
	<b>Total for Services under Exhibit G:</b>	<b>\$119,900</b>
<b><u>Exhibit H: AL TSA Roads to Community Living</u></b>		
	Supportive Housing Trainings	\$220,000
	<b>Total for Services under Exhibit H:</b>	<b>\$220,000</b>
	<b>Subtotal of all Exhibits</b>	<b>\$2,454,925</b>
	Indirect Administrative Fee @ 15 __ %*	<b>\$368,238</b>
	<b>Total Maximum Amount:</b>	<b>\$2,823,163</b>

\*Please include your organization's administrative fee by percentage



**Attachment E  
Contractor Inclusion Plan**

**Instructions**

DSHS requires that bidder submit this inclusion plan template as part of their proposal. Once submitted, the Inclusion Plan template becomes part of the contract if awarded to the bidder. The Bidder shall also include an anticipated list of small and diverse subcontractors or vendors who may provide services on the project. Responses should reflect the Bidder's sincere efforts to include diverse small businesses. Businesses listed in the plan must be certified by OMWBE or DVA, or registered in WEBS as a small business. If a company is not certified or registered but may be eligible for certification, the Bidder should encourage the company to become certified.

Inclusion goals are aspirational. No preference is given for inclusion plans or goals in the evaluation of bids. While no minimum level of OMWBE certified, Veteran Owned, or Washington Small Business participation will be required as a condition for receiving an award, the plan must include the actions the contractor will take to increase subcontracting opportunities for those business types.

**DIVERSE BUSINESS INCLUSION PLAN**

1. Do you anticipate using, or is your firm, a Washington State Certified Minority Business?  
 YES    NO
  
2. Do you anticipate using, or is your firm, a Washington State Certified Women's Business?  
 YES    NO
  
3. Do you anticipate using, or is your firm, a Washington State Certified Veteran Business?  
 YES    NO
  
4. Do you anticipate using, or is your firm, a Washington State Small Business?  
 YES    NO
  
5. If you answered No to all the questions above, please explain:

We anticipate subcontracting a significant portion of the work of this contract to businesses in Washington state, many of whom are certified with the OMWBE. Service Alternatives itself is *not* a certified business with the OMWBE, however we are 100% women-owned. We have too many employees and earn too much revenue to qualify for certification as a Women-Owned Business in Washington State. For the purpose of question 11, we do count our own work in the category of women.

6. A description of your firm’s planned efforts at outreach to the small and diverse business community:

Service Alternatives routinely contracts with small and diverse businesses in the course of our technical assistance work. Among the businesses we partner with, we have contracted with interpreters, DEI consultants, and a cadre of diverse self-advocates. We also contract with multiple specialists and consultants that operate single-person firms as small or micro businesses. To facilitate improvement in Service Alternatives’ outreach to Washington’s diverse population and the diverse business community, Service Alternatives adopted a Diversity, Inclusion, and Belonging plan in December of 2021. To continue the work of this plan, in 2022 we partnered with a third-party human resources firm with a focus on DEI as a consultant to evaluate and recommend further steps we can take to include small diverse businesses as well as our diverse staff.

7. A list of projects (5 max.) with diverse business participation in the last five (5) years:

<b>Subcontractor</b>	<b>Project</b>	<b>Year</b>	<b>Percentage</b>
Dr. Sharon Knight (DSK-Culturally Responsive Educational Services, LLC)	Equity and Social Justice Training for King County Employment Service Providers	2021-Present	50%
Hassan Wardere (Bulle Consulting, LLC)	Equity and Social Justice Training for King County Employment Service Providers	2021-Present	50%
Benita Horn (Benita R.Horn & Associates)	DDA Leadership Academy	2019-Present	25%
<ul style="list-style-type: none"> <li>• Scott Palm (Palm Tree Enterprise)</li> <li>• Cody Brown</li> </ul>	Developmental Disability Specialty Training Presentations	2018-Present	15%
Margaret Thompson	Education Capacity Development for King County	2019-2022	100%

8. A description of how firm considers small business in the development of bid packages

While we are bidding for this contract as a sole, primary contract holder, we have previously created bid packages with small businesses as full partners in the proposal. In the context of this proposal, Service

Alternatives intends to invest heavily in the Washington State Business community, particularly among diverse and small businesses to execute the deliverables of this contract.

9. Describe the actions you will take to increase subcontracting opportunities for those business types.

Service Alternatives appreciates the partnership that can arise from working with small and diverse businesses. We have an adage when it comes to opportunities that if there is a business better equipped to do the work than Service Alternatives, that other business should do the work. Additionally, while we may believe we are the best fit for the overall project, we recognize that there are often portions of the work that a subcontractor could do better. As we look at the scope of work in this contract, we see opportunities to improve cultural humility among service providers, areas where we can integrate the voices of self-advocates into existing and new trainings to share their lived experiences as clients of DDA and DSHS, and a review on the intersections of race, gender, religion, and other protected classes with ID/DD diagnosis. Many of these topics are best presented by experts with lived experience. As the primary contract holder, our ability to connect these experts with the community is contingent on building subcontracts that meet the needs of DDA as outlined in the Sample Contract.

One challenge Service Alternatives would face in subcontracting portions of this contract to small or diverse businesses are the insurance requirements laid out in the Sample Contract which must be passed to any subcontractor. As mentioned in our management proposal, we do recommend giving the DSHS contract manager discretion to exempt subcontractors from requirements on particular forms of insurance when such insurance is excessive and the risk it covers is negligible. For example, a microbusiness where a self-advocate presents their experience having lived in an RHC without any vehicles owned by the business should not need commercial auto insurance as commercial transportation is not a core part of their business.

10. How big is the Diverse Inclusion team in your organization?

- 10.1 1 person
- 10.2 Less than 5 person
- 10.3 More than 5 person

If you answered Yes to any of questions one through four, please complete questions eleven through thirteen.

11. Please list the approximate percentage of work to be accomplished by each group in this contract:

- 11.1 Minority 3.01%
- 11.2 Women 41.72%
- 11.3 Veteran 1.35%
- 11.4 Small Business 4.47%

These numbers are based on recipients and subrecipients of DDA Technical Assistance Firms from July 2022 through May 2023. Service Alternatives is included as a women-owned business for the purpose of this question. These numbers also reflect the ownership of the business completing the work and may not represent the person fulfilling the work from the firm.

12. Please identify the person in your organization to manage/ lead your Diverse Inclusion Plan responsibility.

12.1 Name: Belinda Kindschi

12.2 Phone: 206-228-3428

12.3 E-Mail: Belinda.kindschi@servicealternatives.com

13. Please identify the list of potential diverse subcontractors

Individuals and firms that are either small, women-owned, minority-owned, and/or veteran-owned currently on contract with Service Alternatives who have performed technical assistance services:

- Carolyn Hartness
- Jeanne Meyer
- Margaret Thompson
- Deborah Moskowitz (Deborah Moskowitz- Consultation & Training)
- Michelle Darlington
- Jennifer White (Able Opportunities, Inc.)
- Shanya Luther (Among Friends)
- Azra Grudic (Azra Grudic Consulting & Counseling)
- Laura O'Rourke (Behavior Bridges)
- Rajesh Roger Ramsukh
- Savannah Rico
- Teri Johnson
- Woodrow W. Pollock
- Hassan Wardere (Bulle Consulting, LLC)
- Dr. Sharon Knight (DSK- Culturally Responsive Educational Services, LLC)
- Benita Horn (Benita R. Horn & Associates)
- Lisa Latchford (Fox Associates Consulting LLC)
- Susan Collins (HaRT3S)
- Amelia Price (Homestead Occupational Therapy and Consulting)
- Jacqueline Chotiner (Jacqueline E. Chortiner, PH.D.)
- Julie Stringham (Julie Stringham Consulting)
- Monica Meyer (Monica Meyer Consulting)
- Norma Timband (New Transitions Consulting)
- Marsha Threlkeld (Pivotal Consulting and Training, LLC)
- Sherise Baltazar (Proactive Solutions, LLC)
- Nithya Siva (Sno-King Speech Inc)
- Amy Leneker (The Leneker Team, LLC)
- Mary Ellen Baker (The Time Professionals)
- Dr. Vanessa Tucker (Tucker Consulting, LLC)
- Susan Mueller (Vitae Naturopathic, PC)
- Scott Palm (Palm Tree Enterprise)
- Cody Brown

I hereby certify, under penalty of perjury under the laws of the State of Washington, that the certifications herein are true and correct and that I am authorized to make these certifications on behalf of the firm listed herein.

Bidder's Signature:

A handwritten signature in black ink, appearing to read "Robert Hayes". The signature is stylized with a large, sweeping initial "R" and a circular flourish at the end.

Title: Director of Training

Organization Name: Service Alternatives, Inc.

Date: 5/18/2023

Place Signed (City, State): Lynnwood, WA

**List of Payees from June 2022 to Present**

Contractor	Paid	Percent	Firm Status	Certified? (Y/N)	Comments
-No Value-	\$6,663.18	0.44%			
Scott Palm (Palm Tree Enteroprise)	\$2,800.00	0.19%			
Susan Collins (HaRT3S)	\$8,000.00	0.53%	W,S	N	
Susan Mueller	\$0.00	0.00%	W,S	N	
Al Lewis, Jr.	\$150.00	0.01%			
Alena Dicke (South Puget Sound Community College)	\$9,075.00	0.60%			
Alicia Rogers (Forum One)	\$26,400.00	1.76%			
Amelia Price (Homesite) Occupational Therapy and Consulting	\$0.00	0.00%	W,S	N	
Amy Leneker (The Leneker Team, LLC)	\$15,500.00	1.03%	S,W	Y	
Anderson Jolly (Ready Meds Pharmacov)	\$8,000.00	0.53%			
Azra Gualic (Consulting and Counseling, PLLC)	\$0.00	0.00%	W,S	N	
Braney Gerdes-Schutz (Compass Career Solutions)	\$0.00	0.00%			
Benita Horn (Benita R. Horn & Associates)	\$5,140.00	0.34%	W,M	N	
Bruce Anderson (Community Activators)	\$6,500.00	0.43%			
Carolyn Hartness	\$2,000.00	0.13%	W,M	N	
Cassandra Stafford (Vlinder Communication Therapies, PLLC)	\$0.00	0.00%			
Cheryl Borden (Hope Human Services)	\$1,600.00	0.11%			
Cody Brown	\$2,275.00	0.15%			
Craig Frederickson (Janice & Craig Frederickson Adult Family Home)	\$150.00	0.01%			
Deborah Moskowitz (Consulting & Training)	\$8,900.00	0.59%	W,S	N	
Debra McLean	\$0.00	0.00%			
Faith Chaufy	\$300.00	0.02%			
Gene McConachie	\$4,612.50	0.31%			
Hassan Wardere (Bulle Consulting, LLC)	\$0.00	0.00%	M	N	
James Renner (James Renner Counseling)	\$0.00	0.00%			
Jamie Griffith (LICSW PLLC)	\$0.00	0.00%			
Jacqueline Groener (Ph.D., LLC)	\$0.00	0.00%	W,S	N	
Janet Saenz	\$2,860.00	0.19%			
Jeanne Meyer (MS, LMHC, LPC, MAC)	\$0.00	0.00%	W,M	N	
Jeanne Yunker (WISE)	\$27,603.34	1.83%			
Jennifer Dempsey (Community Living)	\$2,931.00	0.20%			
Jennifer King	\$150.00	0.01%			
Jennifer Moffatt (Center for Diablo & Resolution)	\$117,425.00	7.82%			
Jennifer White (Able Opportunities, Inc)	\$17,988.00	1.20%	W,S	N	
Julia Walker (The Arc of Snohomish)	\$4,120.00	0.27%			
Julie Carpenter	\$110.00	0.01%			
Julie Stringham (Julie Stringham Consulting)	\$0.00	0.00%	W		
Keri Kragh	\$300.00	0.02%			
Krista Miller (People First of Washington)	\$14,962.50	1.00%			
Krista Neiman (Puget Sound Regional Services)	\$69,800.00	4.65%			
Lance Walcott	\$2,530.00	0.17%			
Laura O'Rourke (Behavior Bridges, LLC)	\$13,500.00	0.90%	S,W,M	Y	
Lena Tsai (University of Washington)	\$33,000.00	2.20%			
Linda Sandman (Blue Tower Solutions, Inc)	\$2,000.00	0.13%			
Lisa Latchford (Fox Associates Consulting LLC)	\$34,416.64	2.29%	W	N	
Lianne Seratin (Northwest Justice Project)	\$0.00	0.00%			
Michael Beasley (ENSO)	\$1,100.00	0.07%			
Michelle Darlington (RN)	\$0.00	0.00%			
Marcelle Young	\$150.00	0.01%			
Mary Ellen Baker (The Time Professionals)	\$0.00	0.00%	S,W		
Margaret Thompson	\$6,250.00	0.42%	W	N	
Mariah Threlkeld (Paxtal Consulting and Training, LLC)	\$600.00	0.04%	W,S	N	
Matthias Austin (Volunteers of America)	\$27,000.00	1.80%			
Michael Henry (Michael Henry Counseling)	\$0.00	0.00%			
Missy Lopez (Renew County of Grant)	\$1,925.00	0.13%			
Monica Meyer (M Meyer Consulting, Inc)	\$5,600.00	0.37%	W,S	N	
Nate Powers (Community Mediation Services)	\$2,000.00	0.13%			
Nelena Christensen (Community Integrated Services, Inc)	\$4,650.00	0.31%			
Nithya Siva (Sno-King Speech Inc)	\$0.00	0.00%	W,M	N	
Norma Timbano (New Transitions Consulting)	\$0.00	0.00%	W,M,S	N	
Patricia Hughes (Patricia Hughes & Associates, LLC)	\$0.00	0.00%			
Rachel Ehlly (C4 Innovations, LLC)	\$4,000.00	0.27%			
Rachel Nemhauser	\$300.00	0.02%			
Rajesh Roger Ramsdahl	\$24,600.00	1.64%			
Rebecca Jansson (North Seattle College, Seattle Central College, South Seattle College)	\$0.00	0.00%			
Renee Smith (A Human Workplace, LLC)	\$0.00	0.00%			
Samantha Taylor	\$300.00	0.02%			
Sarah Karim (Consulting, LLC)	\$0.00	0.00%			
Savannah Rico	\$0.00	0.00%	S,W,M	N	
Scott Livenwood (Alpha Supported Living)	\$1,000.00	0.07%			
Shanya Luther (Among Friends)	\$24,235.00	1.61%	W	N	
Sharon Knight (DSK Culturally Responsive Educational Services, LLC)	\$0.00	0.00%	W,S	N	On Contract, Not Paid by DDA
Sherise Baltazar (Proactive Solutions, LLC)	\$0.00	0.00%	S,W,M,V	N	
Stacy Dym (The Arc of Washington State)	\$396,000.00	26.38%			
Steve Conrad (Conrad Specialty Consulting Company)	\$0.00	0.00%			
Sugely Sanchez	\$450.00	0.03%			
Tanner Conrad	\$450.00	0.03%			
Teri Johnson (Consultation And Training LLC)	\$9,525.00	0.63%	W		
Tim Corey (Advanced Approach LLC)	\$22,750.00	1.52%			
Vanessa Tucker (Tucker Consulting, LLC)	\$16,912.50	1.13%	W		
Woodrow Pollock (Flow Therapeutic Associates)	\$20,300.00	1.35%	V	Y	
articulate	\$14,539.80	0.97%			
Service Alternatives	\$464,723.81	30.96%			
Grand Total:	#####				

ALTA RI R2 R3 DDST Field Services Emergent RCL Re RCL TA RCL 23 Supported PASRR Housing SOCR

\* M = Minority Owned, W = Women Owned, V = Veteran Owned, S = Small or Micro Business



# STAFF RESUMES

SERVICE ALTERNATIVES

RFP #

PAGES 2 - 5: ORGANIZATIONAL LEADERSHIP

PAGES 6 – 16: CONTRACT COORDINATORS

PAGES 17 – 56: SPECIALISTS

# Belinda Kindschi, MSW

P.O. Box 5010, Lynnwood, WA 98046 | 206-228-3428 | belinda.kindschi@servicealternatives.com

## Experience

### Chief Executive Officer | Service Alternatives | 2015 – Present

- Responsible for leading Service Alternatives as a values-based organization
- Lead organizational strategic planning
- Lead Executive Team to carry out the work of the organization
- Responsible for \$24m revenue, 375 employees, 65 foster parents, and 70 subcontractors

### President, Board of Directors | Service Alternatives | 2015 – Present

- Serve as President of Board of Directors team owner to oversee agency operations
- Work in advisory capacity to provide consultation related to strategic and operational direction of the company
- Monitor company performance

### Director of Training | Service Alternatives | 2003 – 2015

- Responsible for training all employees and foster parents within the agency and training thousands of individuals and organizations throughout the United States
- Design training curricula
- Create training offerings to meet needs of a variety of programs
- Oversee professional training team
- Train agency leaders
- Oversee training sales, program development, marketing, product development, and delivery
- Responsible for 2.25m annual training budget

### Consultant | Service Alternatives | 1999 – 2003

- Design and deliver agency leadership training model
- Facilitate Team Spirit workshops for both intact teams and cross-agency teams
- Work with outside agencies to help them define agency core values and strategic plans
- Provide individual coaching, mentoring, and consultation to agency leaders, including the CEO
- Participate in monthly executive leadership team meetings to make ongoing decisions related to agency direction, employee benefits, and contracts
- Facilitate a variety of workgroups, specifically those which require cross-division critical thinking and decision making

### Administrator | Service Alternatives | 1997 – 1999

- Responsible for overseeing the provision of excellent services to children with developmental, behavioral, and emotional challenges
- Administered annual budget of \$5m

- Facilitated a team of four deputy administrators to work together in a way that achieved excellent services

## Education

Master of Social Work | University of Washington

- Major: Social Work

Bachelor of Science | Lewis & Clark College

- Major: Psychology

Bachelor of Science | Lewis & Clark College

- Major: Business & Administration

## Certifications and Executive Education

- Noble Purpose Learning Facilitator, Plexus Noble Purpose
- Team Spirit Consultant/Facilitator, Plexus Building Team Spirit
- Human Services Management Program certified by the University of Washington
- Excel/Giant Leap CEO Peer Advising and Education

# Karina Briscoe

P.O. Box 5010, Lynnwood, WA 98046 | 425-750-5350 | karina.briscoe@servicealternatives.com

## Experience

### Chief Operating Officer | Service Alternatives | 2019 – Present

- Responsible for leading, developing, and managing the successful operations of SA through establishing and sustaining excellent personnel and operational systems that are in alignment with the organizational mission, values, and vision
- Service delivery oversight, business opportunity management, resource allocation, budgeting, strategic/result focused work
- Personal development, recruitment, and retention

### Director of Adult Supported Living | Service Alternatives | 1997 – 2019

- Operations oversight for residential programs serving approximately 115 individuals with developmental/intellectual disabilities
- Supervision of administrators, area managers, program managers, and staff
- Responsible for contracts, budget and financial oversight, customer service, crisis prevention and management, program expansion, ensuring overall quality of programs and compliance with Washington Administrative Code and Developmental Disabilities Administration policies

### Area Manager – King County | Service Alternatives | 1994 – 1997

- Deputy administrative oversight for residential programs in King and South Snohomish Counties
- Responsible for all King County program development and start up, contract negotiations, budgeting, crisis intervention and prevention, quality assurance, and supervision of Program Managers and Staff

### Program Manager | Service Alternatives | 1993 – 1994

- Responsible for transition of children’s home into Adult Intensive Tenant Support
- Supervision of staff, family and community relationships, participant goal setting, compliance with Valued Outcomes, payroll, hiring and training staff, scheduling and ensuring overall quality and organization of the home

### Residential Care Trainer/Lead Staff | Service Alternatives | 1992 – 1993

- Responsible for direct care for participants, including activities of daily living, transportation, ensuring medical needs were met, assisting with financial budgeting, and accessing community resources
- Responsible for oversight of programs, supervision of direct care employees, ensuring compliance with organizational policy and procedures and contract rules and policies

## Education

### Bachelor of Science | Loyola Marymount University

- Major: Psychology

# Rob Hays

P.O. Box 5010, Lynnwood, WA 98046 | 425-420-0191 | rob.hays@servicealternatives.com

## Skills & Abilities

### Business Applications

- Skilled with Office Suite including Word, Excel, PowerPoint, SharePoint, Teams, and Outlook
- Familiar with, Zoho, Dropbox, Apple Mail, Slack, Pages, and Google Apps

### Content Development

- Familiar with Adobe Creative Cloud applications including Photoshop, Illustrator, InDesign, and Premier
- Used creative common software or open source including Blender, Audacity, Gnu Image, and Manipulation Program

### Web Development

- Familiar with WordPress, Drupal, and Joomla CMS
- Developed sites using MySQL, PHP, Apache, on servers with Linux distributions including CentOS and Ubuntu

### E-Learning

- Adobe Captivate, Storyline Articulate, GotToWebinar, Zoom, xSplit
- Familiar with Moodle, skilled with TalentLMS
- Content adheres to Section 508 and WCA Guidelines as well as following best practices in andragogy
- Have used ADDIE and SAM development methods

## Experience

### Training Director | Service Alternatives | 2015 – Present

- Oversee division of over 25 employees with annual revenue in excess of \$2.5m including establishing budgets for program areas
- Serve on corporate executive leadership team setting policy, vision, and direction for organization
- Supervise leadership team with programs and services including technical assistance, training delivery, curriculum development, leadership consultation and development, grant and proposal writing, and team facilitations
- Coordinate organizational management core training for newly hired supervisors, managers, and administrators
- Managed relationships and contracts with customers in industries including the public sector, healthcare, social services, education, and corporate enterprise

### Technology Manager | Service Alternatives | 2013 – 2015

- Developed new company website
- Developed a technology plan to standardize procurement, track inventory, encrypt systems, and protect data

- Create company policy and procedures related to business technology
- Train and support a team of technology specialists that handle information technology requests from fellow employees

#### Office Assistant | Service Alternatives | Feb 2013 – June 2013

- Entered various forms of data into databases for evaluative feedback and certification documentation
- Produced training materials including manuals and guides
- Built a database for tracking human resource documents and other personnel files

#### Assistant speech and Debate Coach | Edmonds Homeschool Resource Center | 2009 – 2011

- Work with students to help them learn the art of public speaking and competitive debate
- Involved teaching skills in case writing, speech writing, supportive research, oppositional research, physical performance, and critical thinking
- Areas of focus included Lincoln-Douglas style debate and extemporaneous speaking. Required teaching classical and contemporary philosophy, journalistic criticism, and organizational skills.

## Education

#### Master of Business Administration | University of Washington

- Major: General

#### Bachelor of Arts | University of Washington

- Major: Philosophy

## Certifications

- Learning Program Manager, Association for Talent Development

# Elizabeth Kittel

PO Box 5010, Lynnwood, WA 98087 | 206-209-9485 | elizabeth.kittel@servicealternatives.com

## Skills & Abilities

### Event Management

- Coordinated events for independent bookstore and state organizations
- Public speaking

### Account Management

- Managed accounts for exclusive insurance products from RealPage and Assurant
- Oversaw the management of RIGHT RESPONSE® agency accounts

### Writing

- Proficient in writing, copyediting, and copywriting including the creation of Call Scripts, Training Manuals, How-To Guides, author introductions, and stories for SA's Annual Review
- Skilled with Office Suite including Word, Excel, PowerPoint, and Outlook

## Experience

### Technical Assistance Administrator | Service Alternatives | 2023 – Present

- Responsible for development and delivery of consultation and training to meet the needs of the Developmental Disabilities Administration and other customers
- Develop and maintain systems for receiving, completing, and tracking technical assistance requests
- Maintain a pool of subcontractors, financial, and outcome oversight
- Conduct consultations with clients and subcontractors to ensure positive outcomes
- Build and maintain excellent customer and community relationships

### Training Services Manager | Service Alternatives | 2021 – 2022

- Managed the RIGHT RESPONSE program as the first contact for all new and most existing clients, successfully navigating opportunities from initial contact through execution
- Oversaw registration for Instructor Certification Courses and ensured all contracts are executed, materials were provided for events, and invoiced clients for services
- Assisted all RIGHT RESPONSE instructors through recertification
- Assisted clients with digital products and licensing
- Created new processes around credit card billing, recording of payments, and overdue invoices
- Troubleshoot and manage instructor and attendee needs for the internal LMS and create access codes for customers
- Initiated sales calls with both new and established clients to determine their de-esclation needs
- Responsible for all RIGHT RESPONSE invoicing, including instructor licensing fees, product sales, workshop fees, and travel costs
- Registered instructor candidates for Instructor Certification Courses and attendees for workshops

- Managed workbook inventory and coordinated interdepartmental workbook supply runs and other ICC supplies

### Resident Insurance Specialist | Greystar Property Management | 2017 – 2021

- Licensed Property & Casualty Insurance Agent
- Integrated world-class customer service with data analysis to effectively establish and manage client and vendor relationships
- Collaborated closely with team members to improve processes and increase performance, specializing in student housing and compliance programs
- Implemented new Cover360 program for 200+ communities, auditing billing, compliance, charges, and policy metrics
- Created performance improvement scripts and copyedited companywide announcements
- Initiated new training procedures by creating Job Aids and presentations catering to specific clientele needs
- Hosted Q&A training sessions and met one-on-one with communities struggling with compliance and requirements

### Social Media Manager & Pet Care Provider | Puget Paws LLC | 2019 – 2021

- Created bonds with animals and clientele through pet care and publishing bi-weekly blog posts exploring pet culture, health, and education
- Created content for Puget Paws blog, including interviews and in-depth, precise research concerning relevant topics
- Utilize the Puget Paws social media platforms to post relevant and engaging content
- Performed all duties required of an overnight pet sitter, including the care of animals and home security

### Events Host & Bookseller | Third Place Books | 2014 – 2017

- Supported sales, first as a bookseller, then with increasing responsibility as events host and social media support
- Advocated campaign for relevant marketing to capture new customers and increase retail event sales
- Created summer children’s story-time that promoted literacy and participation in bookstore events, cultivating relationships with diverse families
- Promoted and managed author events in-store and on social media
- Wrote and presented author introduction copy, promoting author, IndieBooks, and Third Place Books events

## Education

### Bachelor of Arts | University of Puget Sound

- Major: Vocal Performance

## Certifications

- Property & Casualty Insurance License



# Darold Bivens

PO Box 5010, Lynnwood, WA 98046 | 206-307-2903 | darold.bivens@servicealternatives.com

## Skills & Abilities

### Coordination

- Successfully subcontracted a keynote speaker residing out of country to conduct trainings and presentations virtually for Washington State DSHS/DDA customers and providers
- Event planning and coordination
- Public Speaking

### Copyediting

- Published two annual magazines for non-profit fraternity company
- Writing, researching, and editing

### Organizational Leadership

- Two years' experience as a personal live-in advisor and resource on a floor consisting of 50+ residents

## Experience

### Technical Assistance Project Coordinator | Service Alternatives | 2022 – Present

- Manage department contractor database, from creation to update and maintenance of subcontractor files, such as insurance and business licenses for over 70 active contractors
- Write legal documents for over 70 active subcontractors including base contracts, addendums, and statements of work
- Organize and manage the project coordination of several events and trainings per month for Washington State DSHS/DDA, King, and Snohomish Counties including subcontractor onboarding, location research and scheduling, and registration and event hosting

### Communications & Event Coordinator | Phi Kappa Sigma International Fraternity | 2018 – 2019

- Managed the organization's database from initiation to update and maintenance of all accounts and personal information for over 40,000 active members and alumni
- Published, edited, and created content for Phi Kappa Sigma's annual magazine "The Maltese Cross" digitally and physically distributed to active members and alumni
- Facilitated Phi Kappa Sigma's social media online internship program, including the management and mentorship of four members at a time daily
- Created and sent company orders to over 40 different fraternity chapters across the United States and Canada

## Education

Master of Arts | Brandman University

- Major: Organizational Leadership

Bachelor of Arts | Washington State University

- Major: Journalism & Media Production

# Ali Al-Sadi

PO Box 5010, Lynnwood, WA 98046 | 425-595-1870 | ali.alsadi@servicealternatives.com

## Skills & Abilities

### Project Management

- Managed a team of five in researching, developing, writing, and executing the Service Alternatives 2016 Annual Review
- Co-wrote feasibility study for the city of Edmonds Arts & Culture and Parks & Recreation departments through the Edmonds Community College Project Management program in June of 2016

### Development and Process Improvement

- Developed billing procedures for the Service Alternatives Technical Assistance contract with King County
- Streamlined invoice procedures and quality assurance systems for Service Alternatives Technical Assistance

### Technical Skills

- Provided technical hosting support in Zoom, Skype, and Microsoft Teams for over one hundred virtual trainings and town halls for DSHS, King County, and private customers for Service Alternatives
- Microsoft Office 365 Business, with proficiency in Word, Excel, Outlook, PowerPoint, Publisher. Additional experience in Microsoft Project and Visio

### Communication

- Competed in high school and collegiate speech and debate

## Experience

### Financial Manager | Service Alternatives | 2022 – Present

- Managed the budget of a \$2.2 million Technical Assistance contract with the Washington State Department of Social and Health Services, and \$150 thousand Technical Assistance contract for the King County Equity and Social Justice initiative
- Monitored invoicing from subcontractors to ensure contractual obligations were completed within budget, and compiled and submitted billing for Technical Assistance contracts
- Managed Office Assistants work for state and county contracts, including virtual hosting and data entry

### Corporate Compliance Officer | Service Alternatives | 2022 – Present

- Serving as the point of contact for employees and external stakeholders on inquiries related to fraud and abuse within Service Alternatives
- Coordination and facilitation of Corporate Compliance Committee meetings

### Financial Coordinator | Service Alternatives | 2018 – 2022

- Monitored invoicing and billing for a Technical Assistance contract with the Washington State Department of Social and Health Services, and Technical Assistance contract for the King County Equity and Social Justice initiative
- Compiled data and wrote annual reports of spending upon conclusion of each state fiscal year
- Coordinated Technical Assistance requests from the state and developed tracking methods for requested allocation of funds to ensure fiscal responsibility

### Special Projects Coordinator | Service Alternatives | 2016 – 2017

- Designing and writing company recruitment literature
- Constructing and monitoring billing systems for Technical Assistance

### Office Assistant | Service Alternatives | 2013 – 2017

- Assisting in office tasks, including data entry, writing procedural documents, and processing

## Education

### Bachelor of Arts | Seattle University

- Major: Economics
- Minor: Philosophy

## Certifications

- Rising Stars Participant, Service Alternatives' Emerging Leaders Training Series
- RIGHT RESPONSE® Advanced Certification
- CPR/AED/First Aid Certification, American Red Cross

# Neetu Verma

PO Box 5010, Lynnwood, WA 98046 | 425-616-6780 | neetu.verma@servicealternatives.com

## Skills & Abilities

### Project Coordination

- Project coordination and management – project planning and tracking of tasks, milestones, and deliverables
- Ability to communicate status of all project's tasks, identify the critical path and create detailed and accurate reports of project status
- Initiated and successfully completed knowledge management portal for WNS Learning Academy
- Conceptualized 'Learning Day' for the LA team at Gurgaon – a day for trainers' self-development, grooming, and learning. Later was rolled out and followed at other locations including Mumbai and Pune

### Process Improvement

- Standard operating procedures and process flow creation
- Consistently performed as an Outstanding performer for 11 months (WNS inbound process – sr. customer care executive)

### Office Operations

- Work and contributed across offerings and industries (contact center, behavioral and corporate training, process improvement, and quality control)
- Customer service and content center experience in day to day operations
- Individual contributor, focused on excellent customer experience
- Good written and verbal communication
- Operations management
- Team player

## Experience

### Office Assistant | Service Alternatives | 2021 – Present

- Coordinate technical assistance and training for communities
- Monitor contractor files for completeness
- Follow up with contractors on missing requirements
- Conduct and attend Zoom meetings as necessary
- Host events virtually and provide technical assistance during the event
- Manage database and enter data
- Manage event registration and create certificates as needed

### Deputy Manager | VSF Global | 2020 – 2021

- Project Management

- Setting up new visa application center and managing day to day activities
- Team management liaison with client team
- Reporting daily/weekly/monthly activities to internal and client teams
- Data management and quality adherence

#### Data Analyst | Pactera Edge | 2019 – 2020

- Project planning and tracking of tasks, milestones, and deliverables
- English audio clips/files transcription, along with speech diarization for well-known worldwide tech giant
- Maintaining and exceeding client's set parameters for quality and AHT
- Quality and compliance auditing for new joiners
- Data management

#### Assistant Teacher | Bright Horizon | March 2019 – June 2019

- Help teachers with attendance, grading, and other administrative tasks
- Provide support and reinforcement for teacher and lessons
- Set up materials and equipment to help teachers prepare lessons

#### Deputy Manager | WNS Global Services | 2013 – 2014

- Managed operations for a major customer in WNS
- Managed front end working relationship with the customer
- Overall responsibility for the process and deliverables
- Created process SOPs, process flow and knowledge repository

#### Lead Executive | Kuoni Travel Group | 2012 – 2013

- Driving quality, process improvements, process, and compliance auditing
- Design and deliver strategic and customized training solutions and models based on training needs analysis of diverse customer profile and requirement
- Quality and compliance auditing

## Education

#### Kuoni Academy of Travel | New Delhi

- Diploma
- Galileo CRS Training

## Certificates and Awards

- Client appreciation from Thomas Cook on process AHT improvement drive
- Awarded employee of the month in WNS for quick turnaround of customer and client feedback
- Certified Trainer by Learning Academy (WNS)

# Rory Drewett

PO Box 5010, Lynnwood, WA 98046 | 425-239-6269 | rory.drewett@servicealternatives.com

## Skills & Abilities

### Office Operations:

- Knowledgeable in Microsoft Office and Adobe Flash
- Data entry
- Strong work ethic and highly organized
- Leadership experience

## Experience

### Office Assistant | Service Alternatives | 2021 – Present

- Provide virtual hosting and technical assistance to Zoom meeting attendees
- Process and enter RIGHT RESPONSE workshop paperwork into company database
- Troubleshoot issues for workshop instructors
- Create and send certificates of completion

### Assistant Manager | Issaquah Highlands Self Storage | 2020 – 2021

- Effectively communicating with customers, answering questions, and efficiently resolving customer concerns
- Delivered consistent brand messaging and helped clients find their proper storage solution
- Data and order enter utilizing employer's internal database

### Second Assistant Manager | Bartell Drugs | 2019 – 2020

- Responsible for directing a team while maintain the wellbeing of the store, the items within, and its customers
- Ensured tills and safe were balanced before opening and closing
- Operated and performed light maintenance on modern order kiosk in addition to general troubleshooting for computers and devices

### Supervisor, Servicer A | Metropolitan Transit Systems (MTS) | 2017 – 2019

- Responsible for bus sanitation and light maintenance on metro buses as well as directing bus traffic in the garage and throughout the lot
- Supervised crew while logging payroll, organizing, and collecting paperwork handled by the crew
- Performed general office duties including copying paperwork, filing, data entry, and reconciliation
- Worked cross functionally with other teams such as maintenance and engineering

# Claire Clauson

P.O. Box 5010, Lynnwood, WA 98046 | 206-457-9667 | [claire.clauson@servicealternatives.com](mailto:claire.clauson@servicealternatives.com)

## Skills & Abilities

### Process Improvement

- Implemented 30+ organization wide and contract specific policies and process improvements resulting in enhanced documentation ensuring compliance with Federal, State, and local laws and regulations
- Developed and implemented policy and procedure for contractors in alignment with federal tax requirements and Washington State Department of Labor and industries aligning over 70 contractors to one system
- Reduced data entry time by 75% by implementing a digital expense reporting system
- Developed adaptable cost-sharing tool, improving quality across 55 programs in 11 offices

### Project Management

- Managed 10+ projects related to company marketing, product development, and policy & procedure development
- Spearheaded company-wide employee recognition program completed end of project review setting a standard for projects
- Wrote, directed, and managed the development of 65 training videos with 10 actors ranging from children to adults
- Lead Service Alternatives marketing brand alignment efforts including revised value statements, marketing materials, and brand guidelines
- Lead Service Alternatives Annual Review development from 2017 – 2022

### Quality Assurance and Compliance

- Developed three quality assurance tools for programs within the Training Institute to monitor the consistency and accuracy of the day to day operations within the teams.
- Ensured contract compliance for program operations
- Developed and consulted on the development of organization wide quality assurance policy and procedure, contract database, quality assurance dashboard, and quality assurance tools

## Experience

### Quality, Compliance, & Development Administrator | Service Alternatives | 2019 – Present

- Analyze contracts, federal and local regulations including Washington Administrative Code (WAC), and Revised Code of Washington (RCW) to establish service specific policies including for licensed products and technical assistance service delivery
- Established the Training Institute's Quality Assurance (QA) Program, reviewing program QA responses and providing summaries of identified patterns of both successes and improvements



- Collaborate with the Training Institute to develop, implement, document, and maintain day to day procedures
- Oversaw the development and implementation of contract and licensing compliance reviews both internally and externally
- Serve as final reviewer on RFP and RFQQ proposals ensuring completeness and accuracy
- Subject matter expert in training procedures on companywide policy and procedures, creating consistency in systems across services

#### Interim Director of Training | Service Alternatives | Summer 2022

- Served as Director of Training, providing sabbatical coverage, for the Service Alternatives Training Institute overseeing three service teams and over 20 employees
- Established relationships with external customers providing options for proprietary Leadership Development Trainings to be implemented in their organization
- Navigated challenging customer relationships with grace and empathy, ultimately resolving conflict and developing stronger accountability measures for employees

#### Quality & Finance Manager | Service Alternatives | 2017 – 2019

- Developed, implemented, and maintained accountability in quality control and financial management systems
- Maintained contract payment terms, and compiled, managed, and reconciled \$250,000 in monthly Accounts Payable/Receivable
- Served as final reviewer and prepared A-19s for payment of contracted and subcontracted work with our DSHS/Developmental Disabilities Administration Technical Assistance contract billing on average \$130,000 monthly

#### Administrative Assistant | Service Alternatives | 2014 – 2017

- Coordinated, hosted, or co-instructed 20+ company and contracted trainings
- Issued payments for departmental invoices and contractor payments
- Trained employees on company policies, service specific expectations, and essential job functions

#### Stage Manager | Straw Hat Players | May 2013 – August 2013

- Assistant to the director on 5 productions, simultaneously over 10 weeks
- Contributed to creative/technical direction with director, creative team, tech. staff, and actors
- Managed scheduling, props, and technical elements as well as final public performances

#### Administrative Assistant | Northwestern Mutual | 2010 – 2012

- Managed variable schedules and coordinated application and claim statuses
- Completed, reviewed, and submitted client financial products

## Education

### Bachelor of Arts | Minnesota State University Moorhead

- Major: Theatre Arts
- Minor: Mass Communication

# Vener Azurin

P.O. Box 5010, Lynnwood, WA 98046 | 206-226-6636 | vener.azurin@servicealternatives.com

## Skills & Abilities

### Curriculum Development

- Developed curriculum based on evidence based and best practices
- Development includes – Training Skills Academy, RIGHT RESPONSE®, Equity and Social Justice and Theater of Liberation, Dual Diagnosis, Effects of Childhood Trauma, Adult Learning Theory, Team Building Through Inspiring
- Developed other contract compliant specific training using current tools and methodology

### Leadership Development

- Write and develop leadership curricula for continued growth and development of organizational leaders
- Creates leadership development plans and provide consults with leaders within organization to increase their knowledge in leadership while developing meaningful relationships and partnerships
- Teaches and facilitates leadership workshops within organization such as Emotional Intelligence, Performance Management, Team Building, and leadership specific skills

### Organizational Development

- Lead organization-wide initiatives including recruitment, marketing, and organizational growth
- 20+ years in social services field working with children and adults that experience mental health issues, developmental and intellectual disabilities, and varied life challenges

## Experience

### Training Administrator | Service Alternatives | 2016 – present

- Supervises, coaches, and mentors a team of trainers state-wide and evaluates for quality assurance, compliance, and performance metrics for professional development and skill development on effective presentations and facilitations
- Effectively manages an annual budget of approximately \$650k to meet the training requirements for organization's departments, employees, and customers while balancing resources and training needs

### Master Trainer | Service Alternatives | 1995 – 2016

- Coaches and mentors new and veteran trainers to develop skills on effective presentation and effective facilitation
- Presented and facilitated workshops across the country to a wide variety of audiences in conferences, colleges, public schools, government agencies, social services against. Maintained ongoing relationships and partnerships with customers after the provision of the workshop

## Education

Bachelor of Science | University of Washington

- Major: Psychology

## Certifications

- Project Management Certification, Everett Community College
- Continuing Education Adjunct Faculty, Seattle Pacific University
- ALICE Active Shooter Instructor
- American Red Cross CPR/FA Instructor
- RIGHT RESPONS® Instructor Trainer

## Presentations

- TASH Conference
- Washington State Foster Care Conference
- Virginia Association of Independent Specialized Education Facilities Conference
- Maryland Association of Nonpublic Special Education Facilities Conference
- Washington Association of Migrant Health Clinics

## Memberships/Affiliations

- Board President, Arc of Snohomish County, Washington

# Sandra Cohen

P.O. Box 5010, Lynnwood, WA 98046 | 206-931-1929 | sandra.cohen@servicealternatives.com

## Skills & Abilities

### Executive Coaching

- Master Coach, offering innovative, transformational, comprehensive coaching to corporate clients
- Working directly with high performing C-level executives wanting to make their mark on the world
- Highly educated in the fields of psychology and transformational coaching, bringing confidence, wisdom, and presence to every situation and deeply invested in client's legacy
- Coaching methodology drawn from rich academic background and many years of hands on organizational coaching experiences
- Brings a curated approach to each client engagement using a wide variety of tools, including: neurobiology, cognitive science, psychology, and organizational development
- Advanced ability to listen for what is being said and not said by providing truthful reflections and new strategies that lead to positive change with clients and all the people involved in their lives
- Known for unique intelligence and emotional intelligence with a vast ability to accelerate the growth of high potential leaders and their teams
- Over 20 years of personal development coaching with c-suite leaders, helping organizations build high performing teams identifying and developing emerging leaders both internally with Service Alternatives and with private clients, including: Amazon, Microsoft, Starbucks, Bronx DA, PATH Global Health, Tuscan Women Cook, NYC Department of Sanitation's EAP, Big Brothers Big Sisters, Trinity Counseling Services, Snapchat, Accenture, Huffington Post, Pathwise Leadership, Redfin, and Grand Central Bakery

### Leadership Development

- Understands how to create optimal learning environment, skillfully bringing clients and their teams into new levels of personal and professional development
- Works to build a vision for your potential and facilitating a step-by-step approach with compassion and ease until it becomes your new reality
- Understands the new premise of c-suite leadership includes the ability to create and sustain new cultures of inclusion and openness to diversity
- Expert architect and facilitator of change
- Leads clients through incremental shifts resulting in evidence based and measurable improvements in both human dynamics and the bottom line

## Experience

### Master Coach of Executive Development | Service Alternatives | 1995 – Present

- Also served as:
- Director of Community Employment Services
- Training Administrator

- Consultant

Behavioral Therapist | Compton High School | 1989 – 1994

Behavioral Therapist | Del-Amo Psychiatric Hospital | 1894 – 1992

## Education

Master of Education | Pacific Oaks University

- Major: Human Development in Leadership with multi-cultural perspective

Bachelor of Arts | California University of Northridge

- Major: Psychology

## Certifications:

- Professional Certified Coach – PCC
- Fierce® Certified Facilitator
- Dependable Strengths Certified Facilitator
- Dispute Resolution Center of Snohomish County Publications
- Co-developed Foundations of Emotional Intelligence and Emotional Intelligence in Practice
- Co-developed Cycle of Reflecting – Learning from Mistakes
- VP Board of Directors Amigo's De Las Americas

# Alena V. Yastchenko, PhD

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## Skills & Abilities

### Teaching

- Currently serve as a Senior Lecturer of Psychology at Central Washington University.
- Have consistently received positive feedback from students and coworkers regarding the effectiveness of teaching methods
- Skilled at delivering courses through face-to-face, interactive television, and online modalities
- Taught a variety of internal and external trainings at Service Alternatives for over 25 years
- Since 1999 has been a contracted trainer for 18-hour Family Preservation Services training, 30-hour Intensive FPS training, and 8-hour Introduction to Motivational Interviewing training for providers and DCYF social workers in Washington State

### Administrative

- Currently serve as the department chair in the Interdisciplinary Studies-Social Sciences program at CWU
- Have functioned in the capacity of Program Director for the Interdisciplinary Studies-Social Sciences degree program at CWU for the past 17 years
- Duties include leading a team of faculty, promoting the program through advertising, community presentations, and other contracts, meeting with prospective students and faculty/administration at community colleges, advising prospective and current students
- Have been instrumental in successfully growing the program from a handful of students on one campus to having hundreds of enrolled students and being offered on each CWU campus state-wide
- At Service Alternatives, developed regional agency policies and procedures in response to legislative/licensing guidelines
- Developed and monitored program budgets
- Developed and monitored quality assurance standards. Monitored contract compliance
- Recruited and trained new employees, including direct care staff, case managers, therapists, and training specialists
- Provided leadership supervision, and mentorship to a group of over 20 case managers, therapists, program managers, and training specialists for six years

### Human Services

- Provided direct services to mentally, behaviorally, and emotionally challenged populations for over 15 years
- Developed in coordination with a team of professionals and implemented individual service and treatment plans
- Completed assessments. Periodic client progress reports, discharge summaries, and maintained other necessary documentation

- Worked closely with Children’s support teams: immediate and extended family, community supports, social workers, school personnel, and other professionals

### Project and Curriculum Development

- Developed a Lead Case Manager position within Service Alternatives, Inc. region 2, which later expanded into Clinical Area Manager role in regions 1 and 2
- Developed, implemented, and refined numerous training curricula, including basic (16 hours) and advanced (60 hours) case manager training, Family Preservation Services (18 hours), Intensive Family Preservation Services (30 hours), Family Reconciliation Services (8 hours) and many others
- Participated in numerous RFP and RFQ projects

### Leadership

- Proven ability to support and develop people both within existing agency framework and by utilizing creative approaches in order to allow individuals to work in areas of their passion and competence, such as creating clinical program manager positions for Service Alternatives in Eastern and Northwestern Washington

### Public Relations

- Proven ability to develop and maintain effective working relationships with community partners.
- Represented agency within professional associations and various committees/work groups

### Experience

- Department Chair/Senior Lecturer | Central Washington University | 2016 – Present
- Program Director/Senior Lecturer | Central Washington University | 2006 – Present
- Senior Lecturer | Central Washington University | 2001 – Present
- Instructional Designer and Copyright Specialist | Service Alternatives | 2006 – Present
- Lead Coach/Faculty Mentor | Escala Educational Services, University of New Mexico | 2017 – Present
- Administrator/Area Manager | Service Alternatives | 2000 – 2006
- Special Projects Coordinator | Service Alternatives | 1999 – 2000
- Program Manager | Service Alternatives | 1997 – 1999
- Lead Case Manager | Service Alternatives | 1996-1997
- Case Manager | Service Alternatives | 1995-1996
- Supervisor/Program Manager (Acting) | Service Alternatives | 1994-1995
- Youth Counselor | Service Alternatives | 1992-1994
- Teacher’s Aid | Ellensburg School District | 1993-1994

### Education

#### PHD | St. Petersburg State University, Russia

- Social Psychology

#### Master of Science | Central Washington University

- Major: Experimental Psychology, Applied Behavior Analysis

Bachelor of Science | Central Washington University

- Major: Experimental Psychology



# Dianna Kujawski

PO Box 5010, Lynnwood, WA 98046 | 206-734-9988 | dianna.kujawski@servicealternatives.com

## Skills & Abilities

### Customer Service

- Superior customer relationship manager specialized in healthcare sector
- Build and leverages CRM tool data to resolve issues and ensure B2B satisfaction
- Advance communication and relationship management skills
- Substantial experience in resolving issues, ensuring customer satisfaction

### Training and Development

- More than 10 years of experience designing corporate training and workshops for sales, product teams, and customer service teams
- An adaptive educator with experience facilitating classroom, online, and one-on-one courses

### Sales and Marketing

- Proven track record of supporting and training sales teams to promote products and services in the pharmaceutical industry
- Proficient in Salesforce

### Communication

- Implemented new procedures and policies that improved efficiency and streamlined operations
- Acted as liaison to enhance communication between sales, marketing, and service
- The fulcrum between management and sales

### Leadership

- Lead in the development and deployment of appropriate training
- Lead customer service teams to exceed expected levels of service
- Coordination across company teams as necessary and relevant positions
- Lead by example of company mission, vision, and values

## Experience

### Area Manager | Service Alternatives | 2022 – Present

- Responsible for the oversight of training service delivery within the organization, programs, or externally as assigned
- Areas include fiscal management and compliance to WAC, contracts, and CARF
- Supervisor for 10 Training Specialists
- Responsible for the day-to-day oversight of Training Specialists and training service as they align with Service Alternatives' mission, vision, and values
- Delivery of training as required as needed by SA including introduction to Elemental Leadership, CPR/AED/First Aid, and Your Organized You

- Lead training outcomes and teams with regards to SA's core values

#### Customer Service Manager | Smart Source LLC | 2019 – 2022

- Develop and manage a team of customer care representatives through coaching and performance management, including but not limited to evaluations, training, and scheduling
- Collaborate with senior management on global strategies, organizational strategies, and department development
- Identify and drive operational improvements to ensure best practices and process efficiencies

#### Business Operations Partner | Western States Pharmacy Coalition | 2017 – 2019

- Improved members value by adding strategic business partnerships based on internal and external analytics
- Helping community pharmacies in a constantly evolving industries through a strong long-lasting partnership
- Initial efforts at WSPC increased suppliers by 38%
- Streamlined processes, tools, and resources that increased efficiency to drive greater sales effectiveness and increase sales productivity

#### Various Roles | AmerisourceBergen Drug CO. | 2007 – 2017

- Served over 10 years with AmerisourceBergen in a variety of roles including, PBM Manager, Customer Transition Specialist, and Training/Process Improvement Specialist all of which focused on management and customer service
- As PBM Manager, supported a help desk staff that responded to questions and problems
- Built relationships with network pharmacies regarding insurance and prescription processing contracts
- Functioned in sales capacity as Pharmacy Solutions Specialist and Customer Onboarding Specialist
- Provided sales and support to independent retail pharmacies

## Education

#### Master of Arts | The University of Arizona Global

- Major: Education, Curriculum, and Instruction

#### Bachelor of Arts | Bethel College

- Major: Liberal Studies
- Concentrations in Biology, Chemistry, and Social Science

#### Associate of Arts | Indiana Vocational Technical College

- Major: Medical Laboratory Technology

## Certifications

- Master Trainer Certificate, Association for Talent Development
- Design Learning Certificate, Association for Talent Development
- Blended Learning Certificate, Association for Talent Development
- CPR/AED/First Aid Instructor, American Red Cross

- Certificate in Customer Service, Indiana University

# Joe Buchmann

P.O. Box 5010, Lynnwood, WA 98046 | 360-607-6933 | joe.buchmann@servicealternatives.com

## Skills & Abilities

### Advanced Computer Capabilities

- Microsoft Office – Word, Excel, PowerPoint, and others

### Self-Motivated

- Willing to learn new tasks and responsibilities

## Experience

### Training Coordinator | Service Alternatives | 2015 – Present

- Creation, coordination, and maintenance of training calendar
- Program specific training needs assessment and implementation
- Leadership and staff development plans for training specialists
- Venue acquisition and communication for all training-based activities
- Oversight of training facilities and maintenance
- Training and facilitation of various leadership and team specific needs

### Lead Training Specialist | Service Alternatives | 2013 – 2015

- Trained leadership development, team building, and goal setting
- Developed and edited curriculum
- Participated in special projects, as needed

### Training Specialist | Service Alternatives | 2010 – 2013

- Certified instructor in CPR/FA, Blood Borne Pathogens, RIGHT RESONSE®
- Assessed regional training needs and developed training plans to address training and staff development needs

### Case Manager | Service Alternatives | 2004 – 2010

- Developed behavior plans and assessed supervision needs for clients
- Identified and supported the use of appropriate community resources.

### Youth Care Worker Supervisor/Shift Leader | Service Alternatives | 2002 – 2003

- Set schedule for 3-5 youth care workers/self
- Direct care and supervision of developmentally disabled and “at-risk” youth
- Model effective conflict resolution and problem-solving skills

### Educational Coordinator | The Hutton Settlement | 2001 – 2002

- Plan, organize, and supervise the daily living of children in all activities including social/leisure, chores, school, and spiritual

## Education

Bachelor of Science | Washington State University

- Major: Outdoor Recreation and Wildlife Management

## Certifications

- RIGHT RESPONSE® Instructor Trainer
- Youth Mental Health First Aid Instructor
- Fierce Conversations® Instructor
- American Red Cross CPR/FA Instructor

# Jess Eitelberg

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## Experience

### Training Specialist | Service Alternatives | 2022 – Present

- Deliver virtual and in-person trainings to internal and external participants
- Adapt training content to different learning styles
- Ensure trainings meet Service Alternatives, Developmental Disabilities Administration, and Washington Administrative Code standards
- Complete and submit training documentation within required timeframes before and after trainings
- Deliver Developmental Disabilities Specialty Training to external participants
- Completed the 40-hour Basic Core Train-the-Trainer Course

### Residential Manager | Service Alternatives | 2021 – 2022

- Develop, review, and edit client support plan to meet Service Alternatives, Developmental Disabilities Administration, and Washington Administrative Code requirements
- Collaborate with clients, families, and staff teams to ensure plans meet client's current needs
- Ensure staff understand and follow client support plans
- Develop and maintain relationships with DDA, clients, families, and team members
- Ensure client files are in compliance with requirements
- Review daily client documentation and provide follow-up as needed
- Plan and facilitate team meetings and individual team member check-ins
- Ensure staff are in compliance with training requirements
- Deliver 5-hour Orientation and Safety training to new staff
- Deliver Peer Coaching training to new staff
- Ensure staff understand and follow policies
- Support clients with their daily needs and support plans

### Residential Coordinator | Service Alternatives | 2019 – 2021

- Support clients with their daily needs per their support plans
- Ensure staff understand and follow client support plans
- Collaborate with clients, family, manager, and team to ensure plans meet client's current needs
- Develop, review, and edit IISP's to meet requirements
- Develop and maintain relationships with DDA clients, families, and staff team
- Create, review, and manage team schedules to meet client supervision needs
- Develop and maintain training tools for staff team
- Ensure client files are in compliance with requirements
- Review daily client documentation and provide follow-up as needed

- Plan and facilitate team meetings and individual team member check-ins
- Ensure staff are in compliance with training requirements
- Deliver Peer Coaching training to new staff
- Manage and attend client appointments
- Participate in yearly PCSP meetings

#### Assistant Manager | Village Community Services | April 2019 – Nov 2019

- Support clients with their daily needs per their support plans
- Manage and attend client appointments
- Create and manage monthly staff schedule to meet supervision needs
- Ensure client files are in compliance with requirements
- Review daily client documentation and provide follow up as needed
- Deliver Peer Coaching training to new staff
- Ensure staff are in compliance with training requirements
- Ensure staff understand and follow policies

#### Residential Specialist | Evergreen Recovery Centers | 2018 – 2019

- Support residents with their immediate needs
- Care for resident's children overnight as needed
- Ensure client health and safety
- Maintain residential confidentiality

## Education

#### Bachelor of Arts | Washington State University

- Major: Social Sciences
- In progress

#### Associate of Arts | Everett Community College

# Terri Martindale

P.O. Box 5010, Lynnwood, WA 98046 | 509-367-3176 | terri.martindale@servicealternatives.com

## Skills & Abilities

### Training and Facilitation

- Professional, state certified facilitator with over 10 years of experience educating new employees. Providing in-house staff training to adults, teens, and children.

### Curriculum Development and Grant Applications

- Proficient in developing and creating curriculum to meet the needs of individuals the training will support.
- Successful grant application acceptance by the Bill and Melinda Gates Foundation
- Expert in Microsoft applications including Word, PowerPoint, Excel, and Outlook

## Experience

### Training Specialist | Service Alternatives | 2022 – Present

- Deliver training, including Developmental Disabilities Specialty Training, 40 Hour Basic Core, and CPR/AED/First Aid, within in-person and virtual settings on a variety of topics that meet identified needs of the organization and customers
- Embed culturally relevant, anti-bias approach throughout training content, skills, knowledge, and concepts learned
- Completes and submits training rosters and other required documentation to Training Administrative Assistant within the timeframes required in policy to maintain the workflow
- Delivers quality trainings at the highest level
- Maintains integrity of curricula by using supplemental materials such as videos and handouts that are approved and follow proper use guidelines
- Provides training materials and supplies as required
- Maintains professional demeanor, appearance, and conduct at all times
- Provides trainings in a clean and safe environment

### Case Manager | BF Community Action Committee | 2020 – 2022

- Responsible for intake and eligibility for COVID Rent Assistance Program and Youth Program Participants
- Scheduled eligibility appointments and conducted eligibility and enrollment assessment interviews
- Responsible for collaborating with landlords, employers, and other community partners with participant rental assistance
- Monitored web-based application for potential intake participants
- Compiled monthly reports based on data from caseload, documentation, and outreach efforts to manager for review



### Employment Specialist | Career Path Services | 2019 – 2020

- Responsible for matching job applicants to a specific job that suits their skills and abilities
- Conducted eligibility interviews and enrollment appointments
- Created and facilitated job club workshops for job seeker participants
- Tested skills of job candidates to ensure fit for training
- Conducted mock interviews for job seeker participants
- Created and updated job seeker resumes and cover letters
- Responsible for outreach to job seekers and employers
- Collaborated with team to compile monthly narrative reports based on data from caseload, touchpoints, training, outreach efforts, and justification of increase or decrease in any category
- Monitored job retention of program participants

### Training Director | Tri-cities Residential Services | 2007 – 2018

- Responsible for the leadership and training of all agency staff, including recertifications and continuing education credits for up to 170 new and current staff
- Formed and supervised a training team after seeing an agency need
- Developed, created, coordinated, facilitated, and monitored all classroom training, including classroom curriculum for the agency which included the 40-hour Basic Core Training, safety training, CPR/First Aid, Bloodborne Pathogens, and others
- Monitored and ensured quality control for 16 program related activities for up to 60 clients
- Organized top team fundraising march five years in a row and participated in other fundraising events and banquets

### Program Director | Support Advocacy and Resource Center | 2005 – 2007

- Supervised over 40 staff and volunteers
- Responsible for community awareness campaigns and community service shows on local broadcast station
- Edited and distributed national newsletter quarterly
- Wrote community grants, including one from the Bill & Melinda Gates Foundation

### Family Development Coordinator | BF Community Action Committee | 2002 – 2005

- Increased training program participants in both English and Spanish
- Streamlined services and procedures for auditing staff
- Earned Employee of the Year in 2003

## Education

### Bachelor of Arts | Washington State University

- Major: Social Sciences

### Associates of Arts | San Joaquin Delta College

- Major: Psychology

## Certifications

- Developmental Disabilities Specialty Training Instructor
- American Red Cross CPR/First Aid Certified Instructor
- DSHS/DDA Approved Trainer
- Performance Coordinator – Lisa’s School of Dance

# Monica Phay

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## Experience

### Training Specialist | Service Alternatives | 2022 – Present

- Developmental Disabilities Specialty Training Specialist
- Supported the development and facilitation of two continuing education trainings

### Dialectical Behavior Therapy (DBT) Facilitator | Service Alternatives | 2018 – 2022

- Instructed DBT skills of Mindfulness, Interpersonal Effectiveness, and Emotional Regulation to participants to help live a life worth living

### Residential Coordinator | Service Alternatives | 2018 – 2022

- Responsible for the daily care and medical needs of participants in the program
- Handled monetary affairs and community and social needs
- Responsible for making the staff schedule to ensure program stayed within contract hours and participant needs were met
- Prepared Plan of Care meetings, Person Centered Plans, Individualized Service Plans, and Positive Behavior Support plans to adhere with WAC and DDA Policies

## Education

### Bachelor of Arts | Eastern Washington University

- Major: Communications
- In progress

## Certifications

- CPR/AED/First Aid Instructor, American Red Cross
- Dialectical Behavior Therapy Facilitator
- Developmental Disabilities Specialty Training Facilitator
- Practices in Action Facilitator
- Community Engagement and Inclusion Facilitator

# Heather Ratterree

P.O. Box 5010, Lynnwood, WA 98046 | 425-332-0906 | heather.ratterree@servicealternatives.com

## Skills & Abilities

### Instructional Design

- Training Courses
- E-learning development
- Articulate Storyline

## Experience

### Training Specialist | Service Alternatives | 2021 – Present

- Team lead for the Developmental Disabilities Specialty Training (DDST) program
- Coordinated DDST Advocate trainings with team of four DDST trainers and five advocates
- Collaborated in curriculum updates, program standardization, and DDST onboarding procedures
- Developmental Disabilities Administration approved community instructor
- Employee committee member of SA's Advocate Advisory Council

### Curriculum Developer | KSPS PBS | 2020 – 2022

- Designed culturally responsive, standards-aligned curriculum for KSPS PBS's documentary Injustice at Home (4<sup>th</sup> – 6<sup>th</sup> grade curriculum), featured in OSPI e-newsletter in July 2021
- Collaborated weekly via video conferencing with Education Coordinator to communicate, plan, and problem solve
- Authored curriculum for KSPS PBS's documentary Capturing History and Career Explore Northwest: Health Science and Manufacturing and Aerospace
- Designed weekly thematic units for KSPS PBS's Home Learning Resources and Activities newsletter (PreK – 5) used by over 2,000 subscribers
- Led professional development of College and Career Ready curriculum

### Guest Teacher | Snohomish School District | 2018 – 2022

- Executed lesson plans objectively across grade levels (K – 8) and every discipline
- Plan, executed, and assessed adaptive learning experiences

### Volunteer | Everett Community college | 2013 – 2014

- Used data to assess adult students' current level of performance and adjusted teaching accordingly
- Supported learning needs in the English as a Second Language classroom environment

## Education

### Master of Education | Eastern Washington University

- Major: Curriculum and Instruction

## Bachelor of Education | Western Washington University

- Major: Education

### Certifications

- Certificate in eLearning Instructional Design, University of Washington
- Developmental Disabilities Specialty Training Instructor
- CPR/AED/First Aid Instructor, American Red Cross
- Meet Your Brain: Appreciating and Navigating Neurodiversity
- Bloodborne Pathogens
- Practices in Action: Person Centered Planning
- Engagement, Integration, and Inclusion

# Summer Simpson

PO Box 5010, Lynnwood, WA 98046 | 425-273-2619 | summer.simpson@servicealternatives.com

## Skills & Abilities

### Facilitation

- Dialectical Behavior Therapy facilitator
- Training facilitator, supporting the onboarding of Developmental Disabilities Specialty Training (DDST) and 40-hour basic core trainers
- Advocate Advisory Council Facilitator
- Effective trainer mentor
- Expert in communication and validation
- Curriculum development
- Leader in mindfulness at Service Alternatives

## Experience

### Training Specialist | Service Alternatives | 2020 – Present

- Dynamic trainer and facilitator
- Proficient in providing several core and specialist trainings for employees and external customers
- Collaborate in curriculum updates and program standardization for DDST onboarding procedures
- Developmental Disabilities Administration approved community training instructor

### Dialectical Behavior Therapy Facilitator | Service Alternatives | 2018 – 2019

- Empower individuals to live an effective purposeful life through DBT skills
- Met with individuals in their homes once per week to provide direct support in building and mastering DBT skills goals
- Facilitated DBT skills class once per week with adults and another with at risk youth
- Completed DBT intensive training through Behavior Tech including intensive suicide prevention training
- Member of the DBT consultation team at Service Alternatives

### Direct Support Professional | Service Alternatives | 2015 – 2017

- Provided in home and community support to adults with developmental disabilities to reach their individualized goals

## Certifications

- CPR/AED/First Aid Instructor, American Red Cross
- Bloodborne Pathogens Instructor
- Dual Diagnosis Instructor
- 40 Hour Core Residential Services Instructor Trainer

- Dialectical Behavior Therapy Facilitator
- Introduction to Dialectical Behavior Therapy Instructor
- Appreciating Neurodiversity Instructor
- Community Engagement and Inclusion Instructor
- Person Centered Planning Instructor
- RIGHT RESPONSE® Instructor

# Kathryn Green

P.O. Box 5010, Lynnwood, WA 98046 | 425-341-5077 | kathryn.green@servicealternatives.com

## Skills & Abilities

### Special Projects

- Alzheimer’s San Diego, Social & Emotional Wellness for Caregivers:
  - Created and facilitated a series of online mindfulness meditation classes for caregivers and clients of Alzheimer’s San Diego during the COVID-19 lockdown period
  - Produced and recorded several mindfulness medication audios (each 10 minutes or less) for caregivers to download and use at their own discretion
  - Co-facilitated a bimonthly online “social hour” to increase socialization among caregivers and clients during the pandemic

### Facilitation

- Over 20 years of experience facilitating on a variety of topics to a variety of learners
- Demonstrates proficiency in public speaking, facilitation, verbal, and written communication

## Experience

### Training Specialist | Service Alternatives | 2022 – Present

- Provides dynamic and interactive training for RIGHT RESPONSE® workshops, focusing on de-escalation and crisis prevention to employees and customers of Service Alternatives
- Tailors training to the needs of the participants
- Utilizes effective communication, presentation, and facilitation skills that are grounded in adult learning theories

### Health & Wellness Facilitator | Embodied Wellbeing | 2016 – 2019

- Provided individual and group classes in Tension-Release Exercises (TRE), relaxation techniques, Mindfulness-based Stress Reduction, and stress management methods to individuals with a history of chronic pain, substance abuse, disordered eating, anxiety, and/or depression
- Emphasized personal safety and freedom of choice in all classes to accommodate participants with a history of trauma

### Somatic Wellness Facilitator | Practical Recovery | 2014 – 2016

- Facilitated daily mind-body wellness activities and stress reduction methods for the residents in treatment for substance abuse
- Tailored classes to the specific needs of the group
- Class sizes ranged from 1 – 12 students

### Teacher/Facilitator | Body Mind College | 2001 – 2010

- Taught and co-taught curriculum classes to the adult students enrolled in the Massage Therapy and Holistic Health Practitioner vocational programs



- Classes taught included Introduction to Anatomy and Physiology, Practitioner Development, Mindfulness, Yoga & Meditation for Stress Management, and Self-care for Injury Prevention
- Co-facilitated classes of up to 40 participants

## Education

### Bachelor of Science | Arizona State University

- Major: Health Education and Health Promotion

### Holistic Health practitioner Training | Body Mind College San Diego

- 1000-hour training integrating the philosophies and practices of Tai Chi, Yoga, Qi Gong, Mindful Breathing, Medication, Swedish Massage Techniques, Aromatherapy, Plant-based Nutrition, Herbology, and Marshall Rosenberg's Non-violent Communication

## Certifications

- Adult and Pediatric CPR/AED/First Aid Certification, American Red Cross
- RIGHT RESPONSE Instructor Certification
- Behavior Technician Training, Florida Institute of Technology
- Health and Wellness Coach, Real Balance Global Wellness Services

# Joel Gipson, LMHC-A

P.O. Box 5010, Lynnwood, WA 98046 | 425-399-2743 | joel.gipson@servicealternatives.com

## Experience

### Training Specialist | Service Alternatives | 2022 – Present

- Conduct hands on skills training, as well as train-the-trainer sessions, directly contributing to healthier communities
- Conduct, deliver, and facilitate training RIGHT RESPONSE® workshops
- Ensure that training needs are met as stipulated by regulation and customer requests
- Perform and instruct physical management skills with consistency that follows local regulations, protocols, and stipulated by customer needs

### Mental Health Professional | Sunrise Behavioral Health Clinic | Mar 2022 – Aug 2022

- Assess adults from the community for ongoing mental health services using ICD-10/DSM 5
- Use CBT, IMR, and Creative Arts interventions to treat client's mental health symptoms
- Create Individualized Service Plans based on initial intake within 30 days of engagement in services
- Assess clients when in crisis and facilitate their ability to remain stable in the community

### Intake Specialist/SED Care Manager | Sunrise Community Mental Health | 2019 –2022

- Assess men and women from the community for ongoing mental health services using ICD-10/DSM 5
- Work in a team environment to provide mental health therapy to members of the community who are apart of Supported Employment Demonstration for the next three years
- Create treatment plans based on initial intake within 30 days of engagement in services
- Assess clients when in crisis and facilitate their ability to remain stable in the community

### Mental Health Consultant | Hope4shame LLC | 2014 – 2019

- Assist church leaders with understanding mental health conditions
- Train church leaders on Suicide Prevention
- Equip church leaders on how to assist those with mental health conditions who are in crisis

### Clinical Lead | Sunrise Community Mental Health | 2018 – 2019

- Supervise staff at two small behavioral health agency locations
- Assess new clients for services
- Review documentation of clinical staff
- Use electronic medical records system
- Run office meetings
- Assist clinical staff with clients in crisis
- Oversee office administration
- Regulate office budget

### Clinical Educator | Sunrise Community Mental Health | 2017 – 2018

- Trained new clinical staff on policy and procedure of agency, NSBHO, and WAC
- Educate new clinical staff on use of EMR system
- Oversaw implementation of new policy and procedure training of ongoing staff at multiple location
- Did review work with ongoing staff needing retraining on policy and procedures

### Clinical Lead | Sunrise Community Mental Health | 2015 – 2017

- Provided supervision for clinical staff ( peer counselors, MHT, case managers, and licensed associates)
- Reviewed clinical staff caseloads
- Evaluated clinical staff's ability to follow and adhere to policies and procedures of agency and NSBHO
- Oversaw office administration
- Deescalated clients in crisis
- Trained new staff
- Assess men and women from the community for ongoing mental health services using ICD-10/DSM 5

### Intake Specialist | Sunrise Community Mental Health | 2014 – 2015

- Assess men and women from the community for ongoing mental health services using ICD-10/DSM 5
- Work in a team environment providing ongoing services to those in the community with mental health disorders
- Create treatment plans based on initial intake within 30 days of engagement in services
- Assess clients when in crisis and facilitate their ability to remain stable in the community

### Mental Health Therapist | Sunrise Community Mental Health | 2012 – 2014

- Counsel clients with varied Axis I disorders including PTSD, mood disorders, and psychotic disorders to understand the symptoms and strategies to cope with their disorder
- Create treatment plans based on initial intake within 30 days of engagement in services
- Assess clients when in crisis and facilitate their ability to remain stable in the community
- Use CBT and Family Systems Therapy interventions o assist clients with understanding their life stressors connection to current mental health symptoms

### Case Manager | Sunrise Community Mental Health | 2011 – 2012

- Coordinate with Snohomish County Jail Transition Services Liaison on client continuum of care
- Meet clients in jail for intake
- Engage clients in the community to find essential resources
- Travel with clients to DSHS, SSA, or any other appropriate agency to assist with applying for medical benefits and income
- Counsel clients with varied Axis I disorders including PTSD, mood disorders, and psychotic disorders to understand the symptoms and strategies to cope with their disorder

### Mental Health Technician III | Compass Health | Feb 2011 – Aug 2011

- Provide supervision of residents during the night shift
- Assess the consumer's strengths and problem areas
- Apply appropriate rehabilitation and treatment modalities
- Assess, monitor, and document the consumer's progress
- Provide a place to enable individuals to function with greater independence

### Registered Counselor | Gipson Counseling Services | 2009 – 2010

- Provide a safe space for children, teens, and their families to talk about feelings, behaviors, and actions that are troubling them
- Use play, family, and Cognitive Behavioral Therapy interventions with clients

### MFT Intern | Marriage and Family Matters | 2007 – 2008

- Provide a safe space for children and teens to open up about problems and fears
- Use Cognitive Behavioral Interventions with parents and boys
- Use Play Therapy to allow boys to work through grief from death and divorce
- Trained in running and advertising a private practice

### MFT Trainee | Vanguard Counseling Center | 2006 – 2008

- Provide couples and individual therapy to a diverse university population
- Supervised on how to write and take case reports, therapy notes, and assessments
- Learned the use of interventions that nurture the mental health of clients
- Administer and interpreted tests (i.e. MMPI, 16 pf, and House Tree Person)

## Education

### Master of Science | Vanguard University

- Major: Psychology

### Bachelor of Arts | San Diego State University

- Major: History

## Certifications

- WA Counselor Agency Affiliated #CG60207684
- WA Certified Mental Health Professional
- Washington State Registered Counselor
- California Marriage and Family Therapist Intern

# Kristjan Kay

P.O. Box 5010, Lynnwood, WA 98046 | 360-259-6640 | [kristjan.kay@servicealternatives.com](mailto:kristjan.kay@servicealternatives.com)

## Skills & Abilities

### Facilitation and Operations

- Proficient in digital classroom management programs
- Excellent written and verbal communication skills
- Able to quickly pick up new skills
- Ability to work independently and within teams
- Strong organizational skills
- Proficient with Microsoft Office and Google Drive
- Flexibility to preform tasks as needed

## Experience

### Training Specialist | Service Alternatives | 2023 – Present

- Provides dynamic and interactive training for RIGHT RESPONSE® workshops, focusing on de-escalation and crisis prevention to employees and customers of Service Alternatives
- Tailors training to the needs of the participants
- Utilizes effective communication, presentation, and facilitation skills that are grounded in adult learning theories

### Classroom Teacher | Roanoke City Public Schools | 2021 – 2022

- Implemented classroom management strategies
- Created instructional materials for students
- Recorded and monitored students' progress
- Contacted parents about the successes and challenges of students
- Lead classroom lessons over a variety of topics in lecture and discussion formats

### Teaching Assistant | Roanoke City Public Schools | 2020 – 2021

- Instructed, as a substitute, in any given role as needed including Instructional Assistant, Classroom Teacher, Specials Teacher, and Office Work
- Implemented classroom rules and maintained expectations of the teacher
- Assisted students in their learning by answering questions and engaging them to think further
- Lead online discussions with virtual students
- Monitored students as they take state standardized tests

## Education

### Master of Arts in Teaching | Hollins University

- Major: Elementary Education

Master of Fine Arts | Hollins University

- Major: Screenwriting

Bachelor of Arts | Central Washington University

- Major: Film and Video Studies
- Minor: Screenwriting and Interdisciplinary Studies

# Lewis Jr. Keller

P.O. Box 5010, Lynnwood, WA 98046 | 509-833-8878 | lj.keller@servicealternatives.com

## Skills & Abilities

### Facilitation

- Excellent communication
- Public speaking
- Detailed and organized
- Team player

## Experience

### Training Specialist | Service Alternatives | 2002 – Present

- Assess training needs of Service Alternatives programs throughout Eastern Washington
- Work with manager to develop training plans
- Develop training materials
- Conduct classroom-based trainings for Service Alternatives, DSHS, and other social services agencies and school districts

## Education

### Bachelor of Arts | Central Washington University

- Major: Psychology
- Minor: Human Resource Management

## Certifications

- RIGHT RESPONSE™ Instructor Trainer
- American Red Cross CPR/FA Instructor
- DDA 40 Hour Basic Core Instructor Trainer
- Developmental Disabilities Specialty Training Instructor
- INFORMED RESPONSE Instructor (Trauma Informed Care)

# Jason Nichols

PO Box 5010, Lynnwood, WA 98046 | 425-341-5530 | jason.nichols@servicealternatives.com

## Skills & Abilities

### Training and Development

- Experienced trainer and instructional design specialist with over a decade of experience in business and college instruction
- Comfortable working in and creating content for various social and cultural contexts
- Experience creating and presenting content for on-site training, virtual classroom training, and self-directed learning programs
- 10+ years of experience in curriculum development, instructional design, training and development, and public speaking
- Presentation, project management, mentoring, and conflict management skills
- Experience training in western, Asian, and African settings

### Software Skills

- Proficient with Microsoft Office Suite
- Proficient with Adobe Acrobat, Illustrator, Photoshop, and Dream Weaver

## Experience

### Training Specialist | Service Alternatives | 2023 – Present

- RIGHT RESPONSE® training specialist
- Emphasis on de-escalation training

### Lead Trainer | Insight Resources International | 2009 – 2023

- Created and implemented various personal and community development training projects in Hong Kong, the Philippines, South Africa, Mozambique, and the United States
- Created training templates for a variety of educational contexts
- Coordinated with various partners to secure funding for projects
- Continue to serve as an active volunteer

### Data Entry and Customer Service | ACS Profiles | 2021 – 2022

- Focused predominately on data entry for customer orders
- Duties also included communicating with customers about updates to their order status and answering questions about order details

### Instructional Designer | State Farm | 2009 – 2010

- Created content for nationwide training program for local State Farm offices
- Interviewed and coordinated with subject matter experts to identify and deliver key skills for learners



- Collaborated with a large team of instructional designers on large-scale training in compliance with company branding and training templates
- Worked extensively with Microsoft Office and various design tools

#### Instructional Design Lead | Accenture | 2006 – 2009

- Planned and implemented high-level instructional strategies as part of nationwide comprehensive training and development projects for clients
- Performed various administrative and organizational tasks required to lead and manage instructional design teams
- Acted as an editor for team projects, ensuring that projects would comply with client specifications and organizational design templates
- Acted as liaison for the client-side development team as needed, interviewing key subject matter experts for training projects
- Oversaw pilot training programs and managed client feedback

## Education

#### Master of Arts | BIOLA University

- Major: Philosophy of Religion and Ethics

#### Bachelor of Arts | Lincoln Christian University

- Major: Cross-Cultural Ministry

## Certifications

- RIGHT RESPONSE® Instructor

# Sean Tabayoyon

P.O. Box 5010, Lynnwood, WA 98046 | 509-379-4505 | sean.tab@servicealternatives.com

## Skills & Abilities

### Professional Facilitation and Instruction

- Training professionals, caregivers, and families with de-escalation strategies as well as crisis intervention and prevention. Includes training other instructor candidates
- Expansive experience developing training content and facilitating trainings with Zoom, including interactive features for participants
- Facilitated parenting skills classes for adults to assist with discipline strategies and family relationships
- Conducted educational groups in both inpatient and outpatient settings for adults, children, and families
- Ability to simplify and explain complex topics and use technologies for making trainings inclusive

### Public Speaking

- Experience speaking to large groups in broadcast, in-person, and webinar formats
- Experience and education in communication styles for various groups and settings
- Competent with adapting teaching and speaking styles to diverse groups, settings, and situations
- Experience using various types of audio equipment

### Interpersonal Communication

- Extensive experience with professional communication with individuals and groups
- Education and experience with communication skills necessary for difficult situations such as crisis intervention, de-escalation, active listening, and interviewing with the intent to assist clients
- Ability to attune and teach attunement needs of others

### Research and Field Work

- Experience using de-escalation strategies and techniques in residential, inpatient, and outpatient settings
- Experience teaching behavior management strategies to parents and caregivers in group and individual settings
- Research and development for Service Alternatives INFORMED RESPONSE™ trauma-informed care training, some material adapted into RIGHT RESPONSE® curriculum
- Assisted with writing and updating training materials for RIGHT RESPONSE®
- Research and development for Secondary Trauma Steps for Supervisors and Administrators for DDA
- Co-research and developed Service Alternatives Trauma-Informed Bite-sized Leadership training

## Experience

### Training Specialist | Service Alternatives | 2016 – Present

- Facilitating and hosting RIGHT RESPONSE® trainings for prevention and de-escalation of crisis including physical safety/escorts/holds
- Training and mentoring other de-escalation instructors
- Research, development, and facilitation of INFORMED RESPONSE™ trauma-informed care training
- Training and mentoring other trauma-informed care instructors
- Facilitating Motivational Interviewing trainings
- Facilitation CPR/AED/First Aid trainings
- Completing and submitting paperwork from trainings for certification

### Child and Family Therapist | Catholic Family and Child Service | 2013 – 2016

- Individual, Family, and group mental health therapy
- Mental health intake assessments and diagnosis
- Case management, staffing, and consultation for clients
- Collaboration with medical providers, schools, social services, and other providers
- Documentation of client interactions through progress notes

### Mental Health Worker/Case Manager | Comprehensive Yakima | 2008 – 2013

- Mental health counseling and crisis intervention for high acuity youth (Workplace Practicum)
- Create and conduct groups and group activities
- Monitor and interact with clients in inpatient and residential settings for clients with severe mental illness and behavior problems, including documentation of interactions
- Cook and serve meals, wash client laundry, cleaning, medication assistance, counting, and documentation
- Additional role of facilitator for Strong Families parenting class

## Education

### Master of Science | Eastern Washington University

- Major: Social Work

### Bachelor of Science | Central Washington University

- Major: Interdisciplinary Studies – Social Sciences
- Minor: Psychology, Sociology

### Associates of Arts | Yakima Valley College

## Certifications

- RIGHT RESPONSE® Instructor Trainer
- INFORMED RESPONSE™ Instructor Trainer
- Psychological First Aid Facilitator

- Mental Health Professional
- Child Mental Health Specialist
- Disabilities Mental Health Specialist
- CPR/AED/First Aid Instructor, American Red Cross
- Cognitive Processing Therapy
- Childhood Traumatic Grief
- Certified and Rostered Cognitive Behavioral Therapy, CBT+ for Depression, Anxiety, and Behaviors, and Trauma Focused-Cognitive Behavioral Therapy
- Question, Persuade, Remove, Treat (QPRT)

## Honors/Awards

- Summa Cum Laude, President's Scholar, and Honor Roll – Central Washington University
- President's List, Dean's List – Yakima Valley Community College
- Present of Central Washington University Non-Traditional Students Organization Yakima
- Omicron Delta Kappa National Leadership Honors Society
- Phi Kappa Phi Honors Society
- Psi Chi Psychology Honors Society
- Alpha Sigma Lambda Non-Traditional Students Honors Society

# Jan Robin Macandog

PO Box 5010, Lynnwood, WA 98046 | 425-220-0917 | jan.macandog@servicealternatives.com

## Skills & Abilities

### Graphic Design

- Proficient in graphic design tools and software
- Created logo graphics for Service Alternatives including INFORMED RESPONSE™, Psychologically Informed Environment, and Cycle of Reflecting
- Completed online self-paced trainings including, RIGHT RESPONSE® Primer, Introduction to Project Management, Fraud and Abuse, How to Zoom, Mandated Reporting, and Introduction to Technology
- Proficient in Adobe Creative Suite, Articulate Storyline, OBS, Blender, Maya, Zbrush, Procreate

## Experience

### Design Specialist | Service Alternatives | 2020 – Present

- Responsible for the design of curriculum, illustrations, video, and media for both internal and commercial use
- Use a variety of mediums, including electronic media, to achieve artistic or decorative effects
- Collaborate with teams throughout the company to develop materials that adhere to the company brand
- Produce, edit, and publish video and audio material for commercial use
- Provide on-site support for video and audio recording
- Produce online training streams
- Develop self-paced online trainings

### Founder & Creative Director | Strange Clothing Company | 2018 – 2021

- Created all graphic assets for brand use including apparel design, social media posts, motion graphics, stickers, and prints
- Maintain brand's online platforms, including trend research for online marketing, manage page traffic, customer services, returns, and orders
- Develop marketing strategies such as looking for local events to enter our brand, collaborating with local artists to expand brand target markets, and handling sponsorship deals with local talents to increase brand's influence

### Senior Visual Data Specialist | Google Maps | 2015 – 2017

- Created, edited, and improved backed data for Google Maps
- Designed team's graphical banner
- Shaped project guideline for Philippines addressing project

## Education

Bachelor of Arts | Ateneo De Naga University

- Major: Digital Illustration and Animation

# Martin Vennarucci

P.O. Box 5010, Lynnwood, WA 98046 | 206-399-4402 | martin.vennarucci@servicealternatives.com

## Skills & Abilities

### Office Administration

- Data analysis
- Accounting
- Resource planning
- Project Planning
- Task delegation
- Process improvements
- Time Management

### Graphic Design

- Experience in laying out curriculum, flyers, and reports
- Proficient in Adobe Creative Suite
- Proficient in Articulate Storyline
- Proficient in OBS streaming webinar methods

## Experience

### Design Specialist | Service Alternatives | 2021 – Present

- Responsible for the design of curriculum, illustrations, video, and media for both internal and commercial use
- Using a variety of mediums, including electronic media, to achieve artistic or decorative effects
- Collaborate with teams throughout the company to develop materials that adhere to the company brand
- Produce, edit, and publish video and audio material for commercial use
- Provide on-site support for video and audio recording
- Maintain library for company curriculum projects
- Create and maintain database for employee submission forms and maintain various team databases as needed
- Collaborate with teams around the company to plan and execute annual events including Direct Support Professionals week, the company Annual Review, and the company anniversary celebration

### Project Coordinator | Service Alternatives | 2016 – 2021

- Coordinated technical assistance and training for the Developmental Disabilities Administration, King County Developmental Disabilities Division, Aging and Long-Term Support Administration, and communities throughout Washington state

- Partnered with state to arrange CE-training for residential providers, tasks include identifying a training provider, securing venues, creating training flyers, managing registrations, and hosting an event
- Coordinated consultation services for DDA and King County, including identifying consultants who best fit a client's behavioral needs
- Served as liaison between the DSHS, consultants, and supported living facilities
- Prepared financial and evaluation reports for each DDA budget category
- Proactively researched vendors, consultants, and services throughout Washington state to expand consultant database
- Assisted with the development of the company CRM database
- Responsible for designing the company annual report, monthly newsletters, and various flyers
- Maintained a directory of contracted trainers and consultants by inputting, reviewing, and updating information in multiple databases

#### Enrollment Specialist | Premera Blue Cross | 2014 – 2015

- Verified enrollment status and eligibility for applicants
- Collaborated with Premera affiliates to process applications and set up coverage
- Processed payments and resolved payment issues with customers
- Assisted in maintenance of insurance accounts and customer requests
- Resolved issues with enrollment system rejections within the exchange network

#### Item Analyst | Nordstrom | 2014 – 2014

- Entered and maintained merchandise information utilizing Nordstrom's merchandising systems (RMS), EPM, GXS Catalogue, Intertrade, and SharePoint
- Daily interaction with Merchandising Office and vendors to insure data integrity and accuracy
- Supported buying teams by handling everyday merchandising and administrative tasks
- Assisted dropship team with purchase orders and order maintenance

## Education

### Bachelor of Arts | University of Washington, Bothell

- Major: Global Studies



# Exhibit E: Technical Assistance Request

## DDA Training and Technical Assistance Request Form

**Instructions: Complete form in full and send to SA via fax or scan.**  
**NOTE: For DD Specialty Training-use the Specialty Training Request Form**

Requestors work under DDA's regional administrators. Their primary responsibility is to coordinate the logistics around trainings and consultations. Any issues with the TAR such as missing or incorrect can be resolved with them.

For trainings, this box is typically the requester again, however if the request is for a consultation this will be the contact person for client-related questions (typically the case manager). When we write our statements of work we connect or contractor with this person.

This section covers the specifics of the training or consultation. It is sometimes overlooked by DDA but it is important to double check it anyway, as it contains important information about hosting and printing.

We use this section to confirm that all of the above information is correct. This section is to be filled out by SA when the Statement of Work contract has been sent to the contractor, or in the case of 'payment only' events, when the check has been sent. It is then sent back to the requester and authorizer in order to communicate the status of the event.

<b>Send Request To:</b> <b>Service Alternatives Training Institute</b> <a href="mailto:afreer@satraininginstitute.org">afreer@satraininginstitute.org</a> Phone: (206) 209-9485 Fax: (866) 703-6615	<b>Request Made By:</b> Name and Position: Date of Request: E-mail: Phone:
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<b>Training/Technical Assistance Recipient:</b> Name (agency, person, group): Contact: Phone Number: E-mail Address:	<b>Training/Technical Assistance Request Details:</b> Preferred Completion Date: Project Budget: Suggested Consultant (if determined): Preferred Location:
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**Budget Considerations:**

<input type="checkbox"/> Lodging	<input type="checkbox"/> Air Travel
<input type="checkbox"/> Meals	<input type="checkbox"/> Non-DDA Venue
<input type="checkbox"/> Mileage	<input type="checkbox"/> Other (Please Specify):

**Training Considerations:**

**Training:**  **Consultation:**  (If consultation, move to the next section)

Training Topic:	Appx. Number Attending:
Target Audience:	Continuing Education?: Yes <input type="checkbox"/> No <input type="checkbox"/>
<input type="checkbox"/> Certificates	<input type="checkbox"/> SA Registration
<input type="checkbox"/> SA Hosting	<input type="checkbox"/> Refreshments
	<input type="checkbox"/> SA Flyer
	<input type="checkbox"/> Printing Costs

**Description of Services Requested:**

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**Approval of Request (to be completed by DDA):**

Regional Administrator/Designee **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Budget Category That Applies:

<input type="checkbox"/> Regional TA, Training, and Continuing Education	<input type="checkbox"/> Roads to Community Living TA
<input type="checkbox"/> RCL Reinvestment	<input type="checkbox"/> Other:

**Confirmation of Request (to be completed by SA, Inc.):**

Consultant: \_\_\_\_\_

Topic: \_\_\_\_\_

Location: \_\_\_\_\_

Date/Time: \_\_\_\_\_

Appx. Cost: \_\_\_\_\_

SA Training Institute Coordinator **Approval** \_\_\_\_\_ **Date:** \_\_\_\_\_

Cc: DDA TA Contact and DDA Requester

This should cover the basic information about the training or consultation. These fields are occasionally left open if DDA is still working out the details, but it is important to always have a max budget.

\*Note: in some cases we are given a max budget + travel. In this case, we calculate the per diem and mileage, then put the new total in the "Confirmation of Request" box at the bottom.

This space is used to cover the details of the TA request. It is important to always verify their calculations as well as the contractor rate.

This area is for the regional administrators. It specifies which budget category the event is coming out of and verifies that this is an official TA request. We always need a signature before we can process the request.



SA Training Institute  
PO BOX 5010  
Lynnwood, WA 98046  
www.satraininstitute.org

Tel: (206) 307-2903  
Fax: (866)703-6615

**STATEMENT OF WORK FOR PROVISION OF TRAINING/CONSULTATION SERVICES**

This agreement between Paul H. White, hereafter known as the Contractor, and Service Alternatives, Inc., hereafter known as SA, concerns the provision of training/consultation services for Service Alternatives Training Institute and serves as a detailed supplement to the pre-established Contract for Services between Paul H. White and Service Alternatives.

The primary purpose of this contract is to carry out the work of the Technical Assistance and Training Contract (DSHS Contract# 1134-32154), held by SA, with the State of Washington Department of Social and Health Services and the Developmental Disabilities Administration.

Paul H. White, agrees to provide training and/or consultation services on behalf of SA as outlined in the following specifications.

Specific services to be provided: Conduct behavior consultation services for [REDACTED] by the date of April 30, 2019.

SA agrees to pay the Contractor up to the amount of \$850 for the services provided. Payment may include the following types and amounts (all that are checked):

- Flat Rate, inclusive of all expenses: \$
- Presenter/Consultant fee per hour: \$100, totaling \$800.
- Mileage Reimbursement at State Approved Rate per mile according to Office of Financial Management <https://www.ofm.wa.gov/accounting/administrative-accounting-resources/travel>
- Lodging Reimbursement at current state rates using OFM guidelines.
- Meal Reimbursement according to OFM guidelines with receipts.
- Other Travel Expenses with receipts:  flight  rental car  parking  tolls  ferries  taxi/shuttle
- Other expenses: printing with receipts

**Additional Specifications:**

- Contractor will provide behavior consultation services for [REDACTED]. [REDACTED] is in need of support to maintain his placement in his adult family home called T.G.'s. [REDACTED] issue is that he wakes up daily in the middle of the night, gets dressed for the day, and then disturbs the entire household by banging around the home. As a result, the provider needs to get up herself to encourage [REDACTED] to go back to bed, change into his bed clothes and go back to sleep. This is a daily occurrence and the provider has been unable to change his pattern. As a result, she is threatening to serve 30 day notice.
- Contractor will contact Tigist Desta at (206) 992 4829) and [Tegest2004@hotmail.com](mailto:Tegest2004@hotmail.com) to coordinate site visits.
- Contractor will submit a summary of services to Tigist Desta, Adina Angle [angleah@dshs.wa.gov](mailto:angleah@dshs.wa.gov), and SA with recommendations regarding how to best to support Joseph so that he can successfully attend his medical appointments.
- Contractor will submit documentation that performance evaluation feedback has been requested of those individuals benefitting from the training and/or consultation. Contractor understands that payment of invoice will not be issued until SA receives documentation that a request for feedback has been made.
- Contractor agrees to abide by Department of Social Health Services Data Security Policies through the duration of service delivery found here: <https://www.dshs.wa.gov/sites/default/files/SESA/hrrs/documents/datasecurity.pdf>

- Contractor will provide and maintain for the duration of this Statement of Work, the following additional and current documentation (if checked):

Background Check    Insurance: Professional Liability    Certification:

A check for the amount specified above will be issued within 30 days of SA receiving all required documentation. Documentation to be included (all that are checked):

Invoice    Receipts    Roster    SA Written Evaluations    Request for Online Evaluations: <https://survey.zohopublic.com/zs/MyB3wa> Event# TE195699  
 Other Documentation, as per Additional Specifications

Payment for services will be made in accordance with the following schedule:

Completion of Services    Monthly    Other Schedule, as per Additional Specifications

All written correspondence will be sent to the party at the addresses defined below:

If to Services Alternatives:

Service Alternatives, Inc.  
 Attn: Technical Assistance Administrator  
 P.O. Box 5010  
 Lynnwood, WA 98046  
 E-mail: [afreer@satraininginstitute.org](mailto:afreer@satraininginstitute.org)  
 Fax: 866-703-6615

If to Contractor:

Contractor: Paul H. White  
 Attn: Paul White  
 Address: 2901 Sunlight Dr  
 Clinton, Washington 98236  
 E-mail: [pwhite@waisman.wise.edu](mailto:pwhite@waisman.wise.edu)  
 Phone: 608-516-2626

This Statement of Work contains all terms and conditions agreed upon by the parties and supplements the previously established Contract. No other understandings, oral or otherwise, regarding the subject matter of this agreement shall be deemed to exist or to bind any of the parties hereto, except by an official addendum issued, agreed to, and signed by all parties below.

IN WITNESS WHEREOF, the undersigned have affixed their signatures in execution thereof.

\_\_\_\_\_  
 Contractor- Paul H. White

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Service Alternatives, Inc.- Aelfwynn Freer

\_\_\_\_\_  
 Date

## Service Alternatives Training Institute Training Evaluation Form

*All feedback provided will be carefully considered in order to improve the quality of this training.*

Date:

Title of Training:

Trainer:

*What made the most significant impact for you?*

*The trainer could improve the training experience by:*

*What types of training topics would you like to see offered in future?*

*Do you have any other comments?*

**Check one number for each of the following questions:**

	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	N/A
1. The training aligned with the learning objectives.						
2. The information presented was easy to understand.						
3. The training enhanced the skills (thought processes, etc.) I need for my job or family interaction.						
4. The training provided me with new tools (handouts, procedures, etc.) to improve my work setting or family situation.						
5. The training materials and visual aids enhanced my learning experience.						
6. The activities were useful and improved my learning experience.						
7. The trainer was professional.						
8. The trainer communicated skillfully and effectively.						
9. The trainer appeared competent and was able to answer questions about the topic.						
10. The trainer respected the people in attendance.						
11. The trainer was responsive to participants' needs and followed up on requests and concerns.						
12. I would recommend this training to others.						

## Service Alternatives Training Institute Consultation Evaluation Form

*All feedback provided will be carefully considered in order to improve the quality of this consultation.*

Date:

Consultation Topic:

Consultant Name:

*What made the biggest impact for you as a result of this consultation?*

*The consultant could improve service delivery by:*

*Other comments, concerns, or recommendations on further supports:*

<b>Check <u>one number</u> for each of the following questions:</b>	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	N/A
1. The consultation I received was useful to me.						
2. The information provided was easy to understand.						
3. The consultation taught me useful skills.						
4. The consultation provided me with new tools (e.g. plans or techniques) that are fitting to my particular work setting.						
5. The handouts and visual aids enhanced my learning experience.						
6. The activities were useful and improved my learning experience.						
7. The consultant was professional (e.g. on time, prepared, etc.).						
8. The consultant communicated skillfully and effectively.						
9. The consultant appeared competent and knowledgeable and was able to answer questions about the topic.						
10. The consultant was respectful of the people in attendance.						
11. The consultant was responsive to participants' needs and followed up on requests and concerns.						
12. I would be interested in receiving further consultation from this consultant and would recommend them to others.						

## Service Alternatives Training Institute Facilitation Evaluation Form

*All feedback provided will be carefully considered in order to improve the quality of this service.*

Date:

Event Name:

Facilitator:

*What made the most significant impact for you?*

*The facilitator could improve my experience by:*

*Do you have any other comments?*

<b>Check <u>one number</u> for each of the following questions:</b>	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	N/A
1. The facilitation aligned with the identified objectives of the event.						
2. The facilitated process was clear and easy to understand.						
3. The facilitated process enhanced the skills (thought processes, etc.) I need for my job or family interaction.						
4. The facilitation provided me with new tools (handouts, procedures, etc.) to improve my work setting or family situation.						
5. The materials and visual aids enhanced my experience.						
6. The facilitated activities were useful and improved my experience.						
7. The facilitator was professional.						
8. The facilitator communicated skillfully and effectively.						
9. The facilitator appeared competent and was able to answer questions about the process.						
10. The facilitator respected the people in attendance.						
11. The facilitator was responsive to participants' needs and followed up on requests and concerns.						
12. I would recommend this facilitator and process to others.						

**Exhibit L - SA R and D Evaluation Form**

<p><b>Service Alternatives Training Institute</b>  <b>Research and Development Evaluation Form</b></p>
--

*All feedback provided will be carefully considered in order to improve the quality of this service.*

Date:

Project Name:

Service Provider:

*How well did the Service Provider meet your expectations?*

*What went well and what didn't go well with this project?*

*If this project were to be replicated, I would make the following changes to the process:*

<b>Check <u>one number</u> for each of the following questions:</b>	5 Strongly Agree	4 Agree	3 Neutral	2 Disagree	1 Strongly Disagree	N/A
1. The Service Provider showed competence as a subject matter expert.						
2. The Service Provider met established timelines for project completion.						
3. The Service Provider communicated skillfully and effectively throughout the process.						
4. The Service Provider was courteous and professional.						
5. The Service Provider was responsive to requests in a timely manner.						
6. The Service Provider showed strong leadership skills.						
7. The Service Provider showed strong organizational skills.						
8. The outcomes aligned with the identified project objectives.						
9. The quality of the project deliverables met my expectations.						
10. I would recommend this Service Provider for future projects.						

# Annual Report 2022: Attendance & Evaluation Report

## General Stats

Total Attendance: 3,204

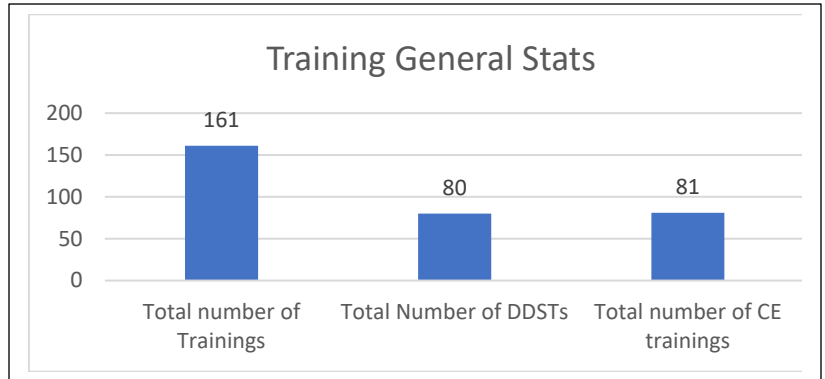
Total Registered: 5,657

Average % attended vs registered: 56.63%

Total Number of Trainings: 161

Total Number of DDSTs: 81

Total Number of CE Trainings: 80



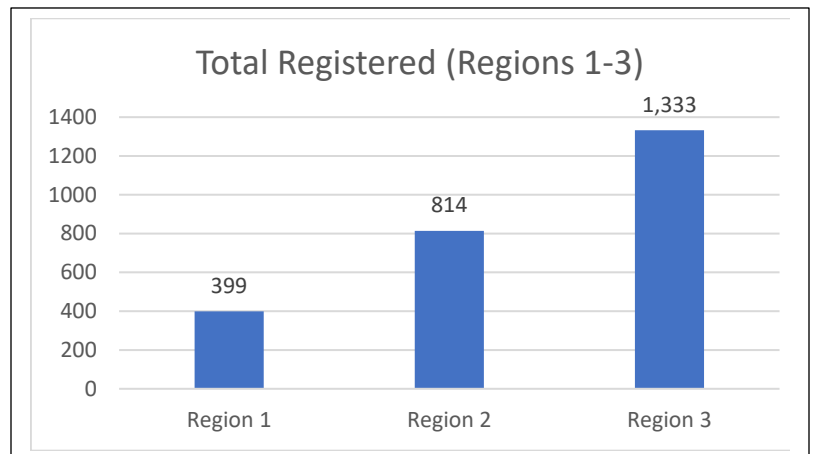
## Training Data Overview

### Total Registered (Regions 1-3)

Region 1: 410

Region 2: 814

Region 3: 1,333

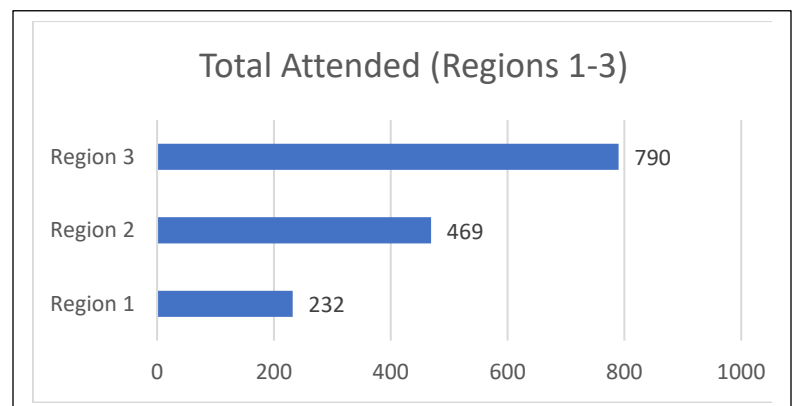


### Total Attended (Regions 1-3)

Region 1: 237

Region 2: 469

Region 3: 790





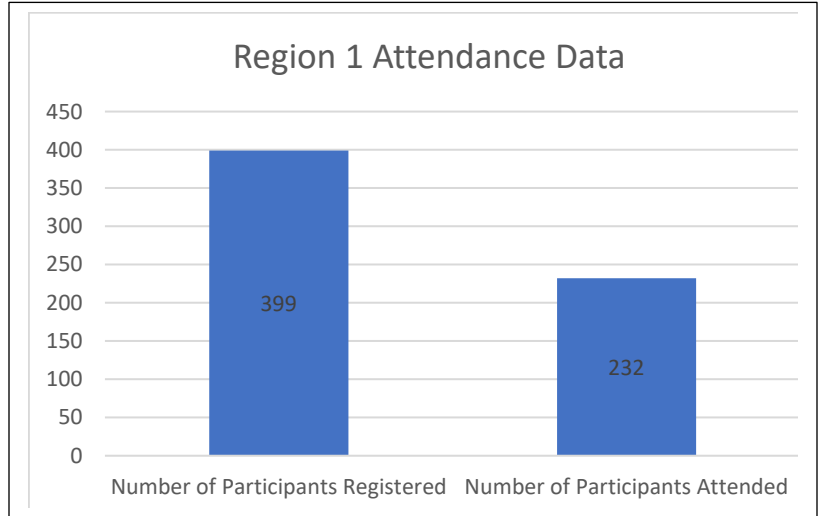
**Region 1**

Total Registered: 410

Total Attended: 237

Total Trainings: 13

Average Evaluations: 4.76



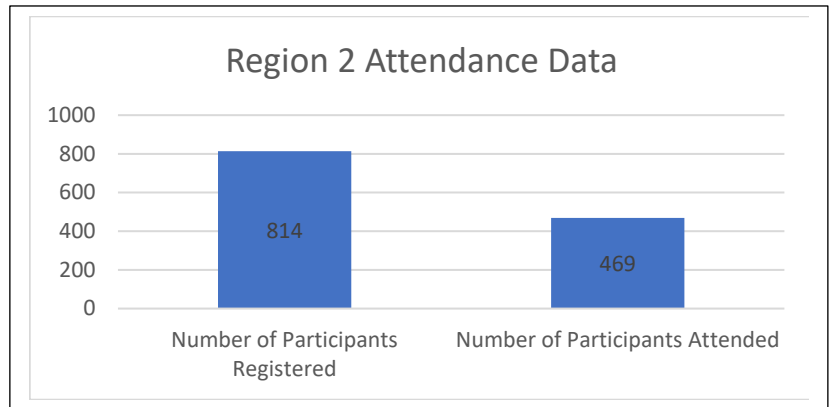
**Region 2**

Total Registered: 814

Total Attended: 469

Total Trainings: 24

Average Evaluation: 4.79



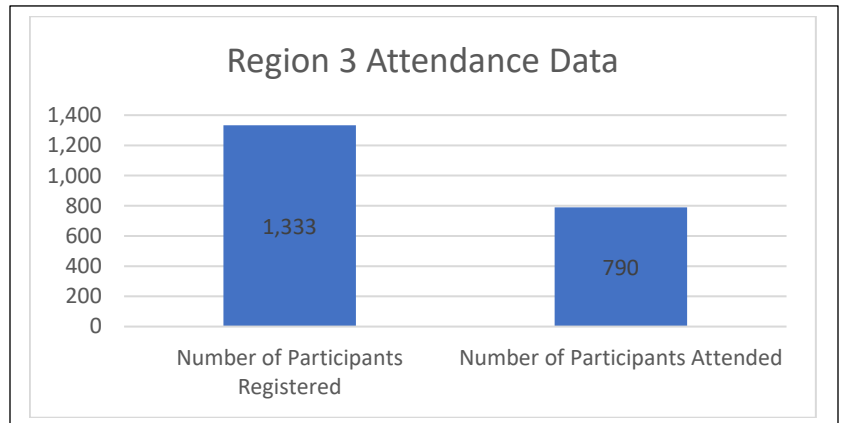
**Region 3**

Total Registered: 1,333

Total Attended: 790

Total Trainings: 27

Average Evaluation: 4.76

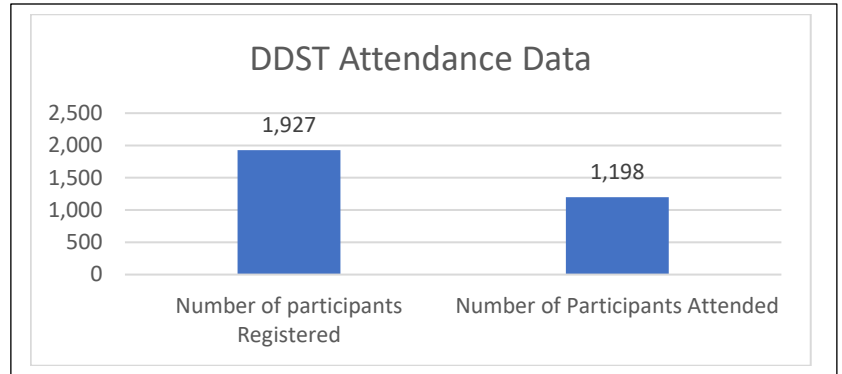


**DDST**

Total Registered: 2,049

Total Attended: 1,271

Total Trainings: 81



## Person Centered Planning Symposium 2022 Overview

**Attendance**

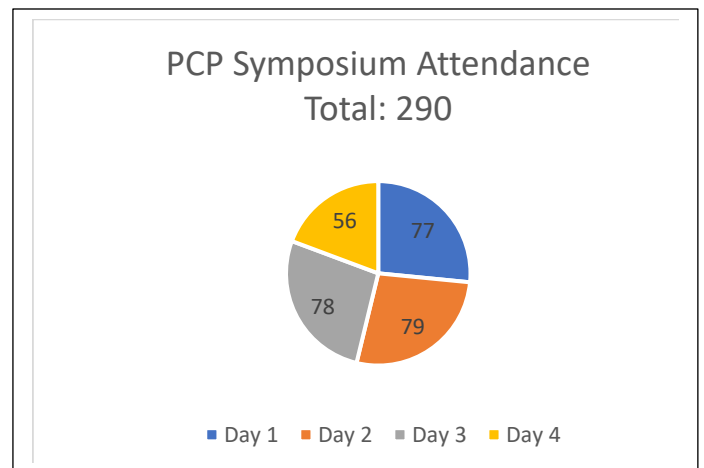
Total Attended: 290

Day 1: 77

Day 2: 79

Day 3: 78

Day 4: 56



**Average Evaluation**

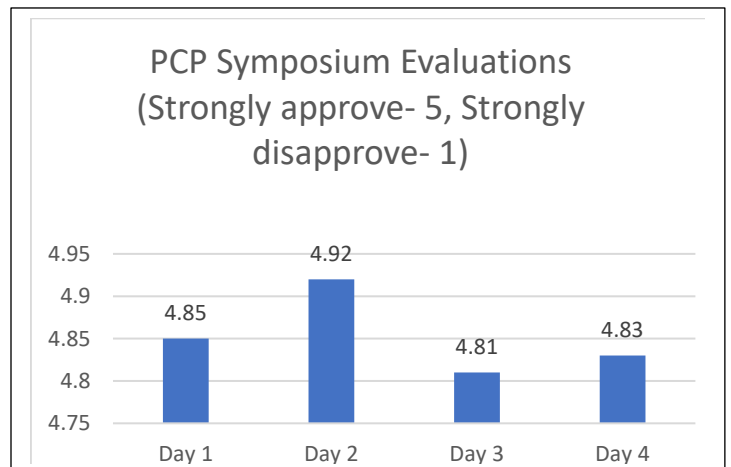
Total Average Evaluation: 4.85

Day 1: 4.85

Day 2: 4.92

Day 3: 4.81

Day 4: 4.83

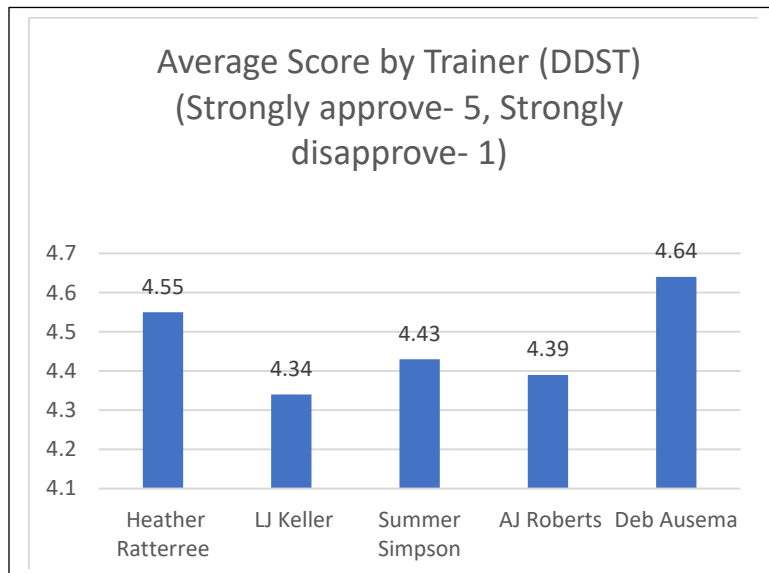


# Trainer Data Overview

## Average Score by Trainer (DDST)

(Strongly approve- 5, Strongly disapprove- 1)

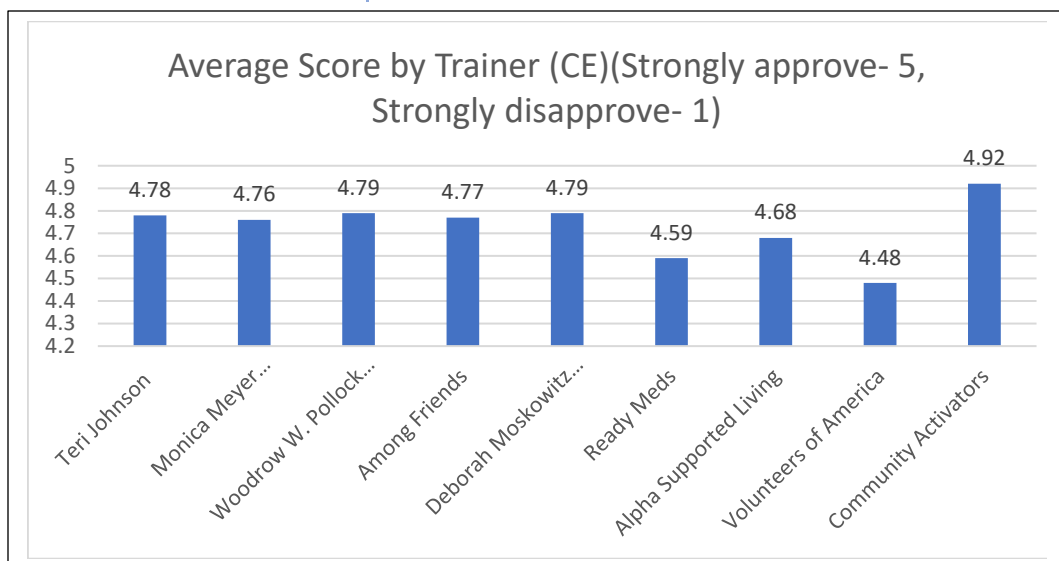
Trainer	Score
Heather Ratterree	4.55
LJ Keller	4.34
Summer Simpson	4.43
AJ Roberts	4.39
Deb Ausema	4.64



## Average Score by Trainer (CE)

(Strongly approve- 5, Strongly disapprove- 1)

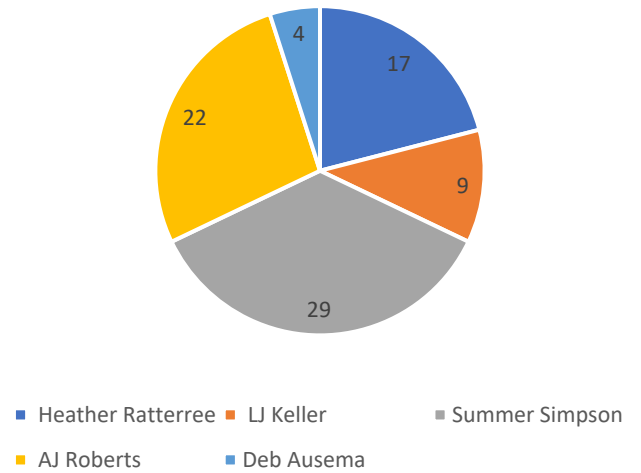
Trainer	Score
Teri Johnson	4.78
Monica Meyer Consulting	4.76
Woodrow W. Pollock III	4.79
Among Friends	4.77
Deborah Moskowitz Consultation/Training	4.79
Ready Meds	4.59
Alpha Supported Living	4.68
Volunteers of America	4.48
Community Activators	4.92



**Total Number of Trainings by Trainer (DDST)**

Trainer	Trainings
Heather Ratterree	17
LJ Keller	9
Summer Simpson	29
AJ Roberts	22
Deb Ausema	4

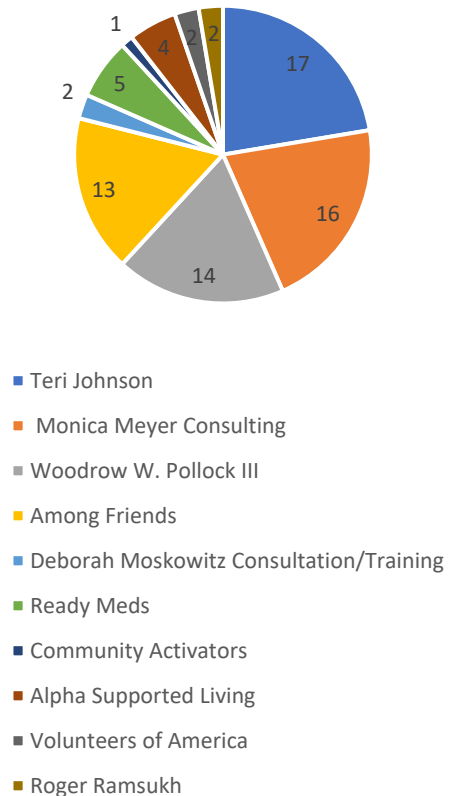
**Total Number of Trainings by Trainer (DDST):**  
81



**Total Number of Trainings by Trainer (CE)**

Trainer	Trainings
Teri Johnson	17
Monica Meyer Consulting	16
Woodrow W. Pollock III	14
Among Friends	13
Deborah Moskowitz Consultation/Training	2
Ready Meds	5
Community Activators	1
Alpha Supported Living	4
Volunteers of America	2
Roger Ramsukh	2

**Total Number of Trainings by Trainer (CE):**  
80



## Event Information

**Event Name:** Among Friends Training R1  
(2.23.23, 9AM-12PM)

**Category:** Region 1

**Fiscal Year:** 23

**Contract:** WA State DDA Technical Assistance

**Community:**

**Location:** virtual

**Region:** Region 1

## Request Information

**Requester:** Smith, Jami -

**Date of Request:** 01/04/23

**Authorizer:** Martin, Jeremy -

**TA Request:** [TAR DDA Provider training - signed.pdf](#)

## Financial Summary

**Maximum Budget Request:**

**Total Spent:**

**Total Remaining:**

## Closed Event Summary

**Consultant(s):** Luther, Shanya

**Report Required? :**

**Event**

**Number of Registered Participants:** 44

**Number of Participants Attended:** 31

**Report:** [Designing a Roadmap Roster 2-23-23.csv](#)

**Number of Evaluations Received:** 24

**Number of Write-Ins:** 2

## Evaluations

The training aligned with the learning objectives: 4.71/5

Average Score

The information presented was easy to understand: 4.67/5

4.66/5

The training enhanced the skills (thought processes, etc.) I need for my job or family interaction: 4.25/5

The training provided me with tools (handouts, procedures, etc.) to improve my work setting or family situation: 4.42/5

The training material and visual aids were useful and improved my learning experience: 4.29/5

The activities were useful and improved my learning experience: 4.46/5

The trainer was professional: 4.92/5

The trainer communicated skillfully and effectively: 4.92/5

The trainer appeared competent and was able to answer questions about the topic: 4.92/5

The trainer respected the people in attendance: 4.83/5

The trainer was responsive to participants' needs and followed up on requests and concerns: 4.83/5

I would recommend this training to others: 4.67/5

What made the most significant impact for you?

I appreciated the exercise on looking at guidelines for different behaviors.  
The success story of the client who declined a threesome  
Just normalizing the conversations for those interested in sexual relationships.  
Learning more options for individuals about what is safe/unsafe.  
All the information opened up great ways to communicate with the clients.  
Using the template/chart to determine healthy vs. questionable vs. risky vs. dangerous.  
the openness and candid talk about a topic most don't talk openly about  
How to go about helping the clients get relationships and sexual relationships.  
I enjoyed the breakout rooms  
The table and like the color concept of green, yellow, pink and red.  
n/a  
How to support clients with relationships  
The conversations about boundaries  
That support staff need to address very basic needs of relationships to those they support. Making sure they understand what is safe, who to ask with questions.  
Working to help people find a healthy romantic relationship.  
Just listening to others comments  
Opening up this topic that's not really talked about to really brainstorm different scenarios where clients we support might be needing our guidance.  
The second group discussion regard how we can help clients find and maintain appropriate romantic relationships

The group engagement was very insightful  
I'm not alone  
Love needs and feelings and being able to express them appropriately towards others.  
hearing examples from other caregivers  
The group discussions to share ideas for issues; the green-yellow-pink-red charting approach  
Everything that was discussed about sexuality and clients rights

---

#### The trainer could improve the training experience by:

Nothing that I can think of.  
I thought it was a good training  
Not reading off the slides almost word for word. It was a lot of presenting and not a lot of room for dialogue.  
n/a  
Nothing.  
Only issues were technical difficulties in the first small groups, some people had issues.  
I think it was presented very well. I have no input on how to improve.  
She did a great job with group small and large. Get more people to talk. It seemed a little quiet.  
I thought she was great  
We feel it was great, could of used more on this subject.  
n/a  
Explain small group projects more  
Na  
group discussions about actual issues facing support staff or management teams  
Death by PowerPoint Text. I thought there was too much text that was read.  
Was good  
I think it went very well. Technical difficulties accessing material due to mobile zoom.  
This was really great, I don't have any feedback to improve this training  
She did excellent for me  
N/A  
Providing more information or examples.  
excellent course

Can't think of anything! Looking forward to more educational opportunities from Among Friends  
Everything was well presented

---

### What types of training topics would you like to see offered in future?

How do we broach the topic of masturbation directly? What are safe, appropriate, and respectful ways for teaching masturbation?

Surprise me please!

Honestly, I am not sure. I just want to normalize that sex is there and it shouldn't be scary to discuss.

Autism

This whole training should be taught in the future.

Further trainings regarding supporting individuals in their relationships, sexual health, etc.

Natural Consequences

More step by step processes of the relationship building and if you have any tools

Community outreach opportunities

You are on the right track so keep these going. I would like to see trainings on how we create groups to have these conversations with our population.

n/a

Dv and Children

Na

unsure

Nothing comes to mind.

Not really sure right now

I'm not sure.

When relationships between clients fail, how staff can assist

Caring for Autistic persons

Clients rights

Melt downs with people with organic brain damage

Expressing your thoughts and feelings with others

more on spectrum disorders

Does Among Friends have a training module or program geared to sharing with people we support? Such as a guided conversation for a social group getting together monthly to watch a movie and discuss it afterwards?

N/A

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### Do you have any other comments?

Not at this time.

Thank you!!

None

n/a

None.

Very helpful!

N/A

N/A

n/a

Love all your trainings. I always walk away with something new to utilize. Thank you!

n/a

Maybe make switching between links and group easier

Nice class

no

No.

None

No

Thank you so much for this opportunity to learn and grow!

N/A

Nope

This was a good class and hearing others thoughts and opinions was great.

no

Just thank you for this today. I find it valuable and exciting.

No



## Service Alternatives Resource Categories

Advocates	Aging	Autism	Behavior & Mental Health	Curriculum Development	De-escalation	Diversity and Inclusion
Employment	Ethics & Leadership	Facilitation	Grief	Housing	Inactive	Mediation
Medications	Nutrition and Health	PCP	Sexuality	Speech Language & Tech	Subcontractor Currently Being O...	Trauma Informed Care
Videography						

Agency	First Name	Last Name	Specialization	Contact Information	Training/Consultation Offerings	Category
Michael Henry Counseling	Michael	Henry	Individual/Family/Group Counseling, National Master Addiction Counselor	<a href="mailto:triniman09@aol.com">triniman09@aol.com</a>	NA	Subcontractor Currently Being Onboarded
NA	Terry	Dosser	Occupational Therapist	<a href="mailto:tdoss100@yahoo.com">tdoss100@yahoo.com</a>	NA	Subcontractor Currently Being Onboarded
Kids & Family Counseling	Vidya	Subramanian	Kids & Family Counseling, BBA Services, Person-Centered-Planning, Community-Based Support, Group Supported Living, Intermediary Supports	<a href="mailto:vidya@kidsandfamilycounseling.com">vidya@kidsandfamilycounseling.com</a>	Contractor interested in developing/providing trainings. Please reach out to individual for more information.	Subcontractor Currently Being Onboarded
Northwest Autism Center	Stephen	Sykora	Speech & Language Therapy, Community Based ABA, Day Treatment, Trainings (Currently going through the Community Instructor Process).	<a href="mailto:ssykora@nwautism.org">ssykora@nwautism.org</a>	<a href="https://www.nwautism.org/">https://www.nwautism.org/</a>	Subcontractor Currently Being Onboarded
The Time Professionals	Mary Ellen	Baker	Time/Brain Management	<a href="mailto:mebaker@thetimeprofessionals.com">mebaker@thetimeprofessionals.com</a>	<a href="https://thetimeprofessionals.com/">https://thetimeprofessionals.com/</a>	Subcontractor Currently Being Onboarded

**Contractor Intake Instructions****All new Service Alternatives contractors must:**

- Complete, sign, and submit the **Intake form** to **Service Alternatives**

**All existing SA contractors must have a current Contractor Intake Form on file with Service Alternatives. All existing SA contractors who have changed their business name or business organization, or experienced other significant changes, must complete, sign, and submit a new Contractor Intake form and return to Service Alternatives.**

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**Section One: Contractor Name/Business Organization****1. Contractor Name.**

- For an Individual or Sole Proprietor, enter your name as shown on your Social Security card on the "Name" line. Please include your Last Name, First Name, Middle Name, and Suffix.
- Other entities. Enter your business name as shown on the legal document creating the entity.

**2. Business Organization. Please mark only one.**

- If you are a nonresident alien foreign person or a business entity established in another state or country, the IRS may require you to complete form W-8
- If you are a Nonprofit Corporation or a Faith-Based Nonprofit Corporation **attach a copy of your 501(c) status.**

**3. Taxpayer Identification Number (TIN).**

- Individual or Sole Proprietor - If you are a sole proprietor please enter your Social Security Number (SSN).
- Other Business Entities - Enter the entity's Employer Identification Number (EIN). If the entity does not have an EIN.

**4. Resident alien.** - If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the SSN box.**5. Default Reported, Waiver Certification, Fiscal Year, UBI Number, Business License, and DUNS Number.**

- List any contracts that you have had with the state that have been terminated for default.
- Provide your fiscal year end date.
- Provide your Washington State Uniform Business Identifier (UBI) Number.
- **Attach a copy of your State Master Business License.** You may be exempt from registering with the State of Washington under certain circumstances. For more information review: <http://bls.dor.wa.gov/faqlicense.aspx>
- Initial to confirm your UBI number is registered with the WA State Department of Revenue and that you maintain separate financial books for your business.
- Provide your Dun and Bradstreet (DUNS) Number
  - *This only applies for contractors through the Technical Assistance contract with DSHS, if you do not fall under that please mark as N/A*

**Section Two: Contractor Primary Address** Enter the primary address information of your business. If this form is for a new SA contract, and you want to provide a contract-specific address in addition to your primary one, please do so in Section Five.

**Section Three: Contractor Ownership** Check those that, in your opinion, apply to your organization. Please provide a certification number, if available. For the definition of microbusiness, minibusiness and small business, see RCW 39.26.010 (16), (17) and (22).

**Section Four: Contractor Contact Person(s)** Enter the primary contact information, and job title, for your business. If you are completing this form for a new SA contract, and you want to provide a contract-specific contact person other than your primary one, please do so in Section Five.

**Section Five: Additional Information**

- 1. Contractor Additional Addresses.** If applicable, provide additional addresses used for SA Contracts.
- 2. Contractor Additional Staff.** If applicable, provide additional staff information for SA Contracts. Additional staff may include those who have authority to sign a SA contract on behalf of the business and are referred to as a signatory.

**Section Six: Contractor Certification** You must sign, date, and return this form before SA will issue a contract.

**Contractor Intake**

**Section One: Contractor Name/ Business Organization**

1. CONTRACTOR NAME	DBA OR FACILITY NAME
--------------------	----------------------

2. BUSINESS ORGANIZATION

<input type="checkbox"/> Individual or Sole Proprietor <input type="checkbox"/> Nonprofit Corporation ( <b>Attach a copy of 501(c) status</b> ) <input type="checkbox"/> For Profit Corporation <input type="checkbox"/> Faith-based (FBO) Nonprofit Corporation <input type="checkbox"/> Faith-based (FBO) Unincorporated <input type="checkbox"/> Governmental Entity <input type="checkbox"/> Foreign Person or Entity	<input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Liability Partnership (LLP) <input type="checkbox"/> Limited Liability Limited Partnership (LLLLP) <input type="checkbox"/> Limited Liability Company, filing as a Corporation <input type="checkbox"/> Limited Liability, filing as a Partnership <input type="checkbox"/> Limited Liability Company, filing as a Sole Proprietor
---	---

If your business is **NOT** a sole proprietorship,  
**Attach a list** of the partners, members, directors, officers, and board members.

3. TAXPAYER IDENTIFICATION NUMBER (TIN) Enter your TIN in the appropriate box. <ul style="list-style-type: none"> <li>For individuals, this is be your Social Security Number (SSN).</li> <li>For other entities, it is your Employer Identification Number.</li> </ul>	<b>Social Security Number</b>  Or  <b>Employer Identification Number</b>	_____ (Enter all 9 numbers, NO DASHES)  _____ (Enter all 9 numbers, NO DASHES)
---	--	--

4. DEFAULT REPORTED, WAIVER CERTIFICAITON, FISCAL YEAR, UBI NUMBER, BUSINESS LICENSE, AND DUNS NUMBER

Have you had any contract with the state terminated for default?  Yes  No  
 If yes, **attach a list** of terminated contracts with an explanation of why each contract was terminated.

Is your fiscal year end the same as the calendar year (January 1 through December 31)?  Yes  No  
 If the answer is no, what is your fiscal year end date? \_\_\_\_\_

What is your Washington State Uniform Business Identifier (UBI) Number? \_\_\_\_\_ (Enter all 9 numbers, NO DASHES)

My Washington State UBI Number is registered with the Washington State Department of Revenue. \_\_\_\_\_ (initial)

I maintain a separate set of books or records (separate from my personal finances) that reflect all business income and expenses associated with my business. \_\_\_\_\_ (initial)

**Attach** a copy of your current Washington State **Master Business License** or explain why you are exempt from registering your business with the state of Washington. (See page 1 for information on exemptions.)

What is your Dun and Bradstreet (DUNS) number? \_\_\_\_\_ (Enter all nine numbers, NO DASHES).  
*This only applies for contracts through the Technical Assistance contract with DSHS, if you do not fall under that please mark as N/A*

**Section Two: Contractor Primary Address**

CONTRACTOR PRIMARY ADDRESS (NUMBER, STREET, AND APARTMENT OR SUITE NUMBER)	
CITY, STATE, AND ZIP CODE	
EMAIL ADDRESS	COUNTY WHERE PRIMARY ADDRESS IS (FOR OUT-OF-STATE CONTRACTORS)
PHONE NUMBER (INCLUDE AREA CODE)	FAX NUMBER (INCLUDE AREA CODE)

**Section Three: Contractor Ownership Type**

Is your business owned by a person (or persons) who is (or are):				
	No	Yes; but we are NOT certified*	Yes; and we ARE certified*	Certification number
A Woman?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A Minority?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A Veteran?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

\*Certified means either the business entity (or when the business is a sole proprietorship, the individual) has received a certification number from Washington State’s Office of Minority and Women-Owned Business Enterprises (OMWBE) [www.omwbe.wa.gov](http://www.omwbe.wa.gov), or Department of Veterans’ Affairs (DVA). .

Is your business a certified Disadvantage Business Entity?     No     Yes, no certification     Yes, certified

Does your business qualify as a Microbusiness, Minibusiness, or Small Business under [RCW 39.26.010?](#)     No     Yes

**Section Four: Contractor Primary Contact Person**

Primary contact person is a(n):

Owner     Officer or Board Member     Partner     Staff Member     Elected Official

Other (please identify) \_\_\_\_\_

Is the primary contact person authorized to sign contracts?     Yes     No

PRIMARY CONTACT NAME AND JOB TITLE	PHONE NUMBER (INCLUDE AREA CODE)	
FAX NUMBER (INCLUDE AREA CODE)	PRIMARY CONTACT EMAIL ADDRESS	CELLUAR PHONE NUMBER (INCLUDE AREA CODE)

**Section Five: Additional Information**

1. ADDITIONAL CONTRACTOR ADDRESSES: IF YOU HAVE MORE THAN TWO ADDITIONAL ADDRESSES, YOU MAY **ATTACH** A LISTING OF ADDITIONAL ADDRESSES.

ADDRESS DESCRIPTION	ADDITIONAL ADDRESS (NUMBER, STREET, AND APARTMENT OR SUITE NUMBER)
<input type="checkbox"/> Billing address <input type="checkbox"/> Facility address <input type="checkbox"/> Mailing address	CITY, STATE, AND ZIP CODE

PHONE NUMBER (INCLUDE AREA CODE)	COUNTY WHERE PRIMARY ADDRESS IS (FOR OUT-OF-STATE CONTRACTORS)
----------------------------------	--

FAX NUMBER (INCLUDE AREA CODE)	EMAIL ADDRESS
--------------------------------	---------------

ADDRESS DESCRIPTION	ADDITIONAL ADDRESS (NUMBER, STREET, AND APARTMENT OR SUITE NUMBER)
<input type="checkbox"/> Billing address <input type="checkbox"/> Facility address <input type="checkbox"/> Mailing address	CITY, STATE, AND ZIP CODE

PHONE NUMBER (INCLUDE AREA CODE)	COUNTY WHERE PRIMARY ADDRESS IS (FOR OUT-OF-STATE CONTRACTORS)
----------------------------------	--

FAX NUMBER (INCLUDE AREA CODE)	EMAIL ADDRESS
--------------------------------	---------------

2. ADDITIONAL STAFF: IF YOU HAVE MORE THAN TWO ADDITIONAL STAFF (LISTED BELOW), WHO ARE ALSO RELEVANT TO YOUR SA CONTRACTS, PLEASE PROVIDE INFORMATION ABOUT THOSE STAFF ON A SEPARATE PAGE

Additional staff person is a(n):  
 Officer or Board Member       Partner       Staff Member       Elected Official  
 Other (please identify) \_\_\_\_\_

Is the additional staff authorized to sign contracts?       Yes       No  
 Is the additional staff a contract for SA contracts?       Yes       No

ADDITIONAL STAFF NAME AND TITLE		ADDITIONAL STAFF EMAIL ADDRESS	
PHONE NUMBER (INCLUDE AREA CODE)	FAX NUMBER (INCLUDE AREA CODE)	CELLUAR PHONE NUMBER (INCLUDE AREA CODE)	

Additional staff person is a(n):  
 Officer or Board Member       Partner       Staff Member       Elected Official  
 Other (please identify) \_\_\_\_\_

Is the additional staff authorized to sign contracts?       Yes       No  
 Is the additional staff a contact for SA contracts?       Yes       No

ADDITIONAL STAFF NAME AND TITLE		ADDITIONAL STAFF EMAIL ADDRESS	
PHONE NUMBER (INCLUDE AREA CODE)	FAX NUMBER (INCLUDE AREA CODE)	CELLUAR PHONE NUMBER (INCLUDE AREA CODE)	

**Section Six: Contractor Certification**

**You must sign, date, and return this form.**

**I certify, under penalty of perjury as provided by the laws of the State of Washington, that all of the forgoing statements are true and correct, and that I will notify SA of any changes in any statement.**

SIGNATURE	DATE	PRINTED NAME
		TITLE

**ATTACHED SUPPORTING DOCUMENT CHECKLIST**

- Copy of your W-9 – Request or Taxpayer Identification Number and Certification
- Copy of statement showing Nonprofit 501(c) status (if applicable)
- List of partners, members, directors, officers, and board members (not applicable to sole proprietors)
- Copy of your Washington State Master Business License or proof of exemption
- List of any contracts you have had with the state that have been terminated for default including a brief explanation (if applicable)
- List of Additional Addresses (if applicable)
- List of Additional Staff (if applicable)
- Copy of your Certificates of Insurance (if applicable)



**SA Training Institute**  
PO BOX 1485  
Oak Harbor, WA, 98277-1485  
[www.satraininginstitute.org](http://www.satraininginstitute.org)

**Tel:** (800) 896-9234  
**Fax:** (866) 703-6615

## **CONTRACT REGARDING TRAINING/CONSULTATION SERVICES**

This Contract Regarding Training/Consultation Services (hereinafter called "Contract") is entered into this [] ("Effective Date"), by and between Service Alternatives, Inc., a Washington corporation ("Service Alternatives," "SA Training Institute," or "SA"), whose corporate address is P.O. Box 595, Coupeville, Washington 98239, and [] ("Contractor"), whose address is [] (each, also may be referred to individually, as a "party" and collectively, the "parties").

### **RECITALS**

This Contract may be supplemented by one or more Addendums, the terms of which are incorporated into the Contract. As used in this agreement, "Contract" also includes any such Addendums.

The primary purpose of this Contract is to provide referrals from SA to Contractor for the provision of services to service recipients, to provide services directly to SA, or to provide other services as may be requested by SA ("referrals").

During the term of this Contract, Contractor will provide services to identified service recipients (the "Services") as referred by SA, in each case pursuant to the terms of this Contract and a Statement of Work ("SOW") completed for each referral. The Contractor understands that this Contract does not create an employment relationship, nor may the Contractor represent itself as anything other than a vendor providing services to the service recipients as referred to Contractor by SA. The Contractor also understands that neither this Contract nor any SOW represent a guarantee of any referrals for the provision of services.

### **TERMS AND CONDITIONS**

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. Service Alternatives' Obligations to Contractor: Service Alternatives shall:

A. Provide referrals for all contracted work being requested of the Contractor. At no time is a referral for contracted work through or on behalf of SA to come from anyone outside of SA and without a SOW.

B. Establish a SOW for each service that is being referred to the Contractor. The SOW will outline such details as: a) services to be performed, b) number of authorized hours/days of service, c) location of services to be delivered, d) reimbursement rates, e) paperwork requirements, and f) any other details pertinent to the work being requested.

C. Pay Contractor the amounts specified in the SOW and based on Contractor's provision of required paperwork. Contractor shall be paid within 30 days of SA's receipt and approval of the following: invoice, documentation required by the SOW, and materials required by section 6 of this contract. Should such receipt of invoice, documentation, and/or materials occur later than 12 months

Contractor's Initials \_\_\_\_\_

following the month in which services were performed (see 2C), Contractor shall forfeit any payment requiring such invoicing, documentation, and/or materials.

2. Contractor's Obligations to SA: Contractor shall:

A. Perform the referred Services based on the expectations outlined in the SOW. Contractor will be required to report to SA's designee concerning Services performed pursuant to any referral under this Contract. The nature and frequency of these reports will be left to the discretion of SA.

B. Not incur on behalf of SA any expenses (except as expressly specified in the SOW) without the prior consent of SA, which shall be evidenced in writing. As a condition of reimbursement, Contractor shall submit to SA reasonable evidence that the amount involved was expended and related to Services referred under the SOW.

C. Provide SA with complete, true and accurate copies of documents requested in the SOW, including submission of an invoice for services. Contractor must submit invoicing according to terms outlined in the SOW and provide such invoicing within 60 days following the month in which the services were performed.

3. Additional Contractor Responsibilities:

A. Registration with Washington. Contractor shall be fully registered as a business and employer (if applicable) with the State of Washington for the purposes of operating a business and paying any and all taxes that may be due as a result of any amounts paid pursuant to the Contract or any SOW. Contractor shall provide SA with proof that Contractor is fully registered with the State.

B. Payment of Taxes / Withholding Indemnification / Authorization to Deduct:

- i. Contractor shall be responsible for payment of all taxes due on payments made under any SOW issued pursuant to this Contract in accordance with the requirements of Title 82 RCW and Title 458 WAC, and any federal taxes that may be due or as otherwise may be required
- ii. Contractor shall also have full responsibility for all applicable taxes for all amounts paid to its partners, agents, or its employees under this Contract, and for compliance with all applicable labor and employment requirements with respect to Contractor's self-employment, sole proprietorship or other form of business organization, and Contractor's partner's, agents, and employees, including state worker's compensation insurance (aka industrial insurance) coverage requirements (Title 51 RCW) and any US immigration visa requirements. Contractor agrees to indemnify, defend, and hold SA harmless from any liability for, or assessment of, any claims or penalties with respect to such withholding taxes, labor or employment requirements, including any liability for, or assessment of, withholding taxes imposed on SA by the relevant taxing authorities with respect to any compensation paid to Contractor or Contractor's partners, agents, or its employees.
- iii. If Contractor fails to pay any applicable taxes or amounts due any government agency, including failure to either provide industrial insurance coverage or pay premiums or penalties on behalf of its employees, as may be required by law, Contractor hereby authorizes SA to deduct the amount(s) owed by the Contractor to any government agency, and transmit the deducted amounts to that government agency. This provision

does not waive any of L&I's rights to collect from the Contractor.

C. Method of Provision of Services: The Contractor shall be solely responsible for determining the method, details, and means of performing the Services. Except as otherwise provided in the SOW, Contractor may not assign its duties, rights, or obligations related to any referral under this Contract without written prior approval of SA. If the Contractor does obtain permission from SA to assign duties, rights, or obligations to another Contractor (the "Assistants"), it is agreed and understood that such Assistants are not employees of SA and Contractor shall be wholly responsible for the professional performance of the Services by Assistants such that the results are satisfactory to SA. Contractor shall expressly advise the Assistants of the terms of this Contract and associated SOWs, and shall require each Assistant to agree to be bound by the terms set forth herein. It is also understood that such Assistants are to be used at the Contractor's own expense, and that Contractor is responsible for compliance with all labor and employment laws (if applicable) in connection with the Assistants, and for all taxes compliance (if applicable) in connection with the Assistants.

D. Proprietary Information: As used in this Contract, the term 'Proprietary Information' means information or physical material not generally known or available outside SA or information or physical material entrusted to SA by its clients or other third parties. This includes, but is not limited to information relating to SA's business and its relationships with governmental and other third party entities or persons, confidential knowledge, techniques, processes, and/or any other information of any type relating to marketing, forecasts, sales, pricing, customers, the salaries, duties, qualifications, performance levels and terms of compensation of other employees, and/or cost or other financial data concerning any of the foregoing or SA and its operations. Proprietary Information may be contained in materials such as drawings, procedures, reports, studies, customer or vendor materials or correspondence, budgets, cost or price lists, compilations or computer programs, or may be in the nature of unwritten knowledge or know-how.

It is understood that all Proprietary Information shall be the sole property of SA and that the Contractor will hold in confidence and not directly or indirectly use or disclose, both during the term of the Contract and after its termination, (irrespective of the reason for such termination), any Proprietary Information obtained or created during the period of the Contract, whether or not during working hours, except to the extent authorized by SA, until such proprietary information becomes generally known. The Contractor agrees to not make copies of such Proprietary Information except as authorized by SA. Upon termination of this Contract or upon earlier requests of SA, the Contractor will return or deliver to SA all tangible forms of such Proprietary Information in Contractor's possession or control. In the event that Contractor is an entity or otherwise will be causing its Assistants or other individuals in its employ or under its supervision to participate in the rendering of the Services, Contractor warrants that it shall require each of such individuals to execute a confidentiality Contract containing substantially the terms set forth herein.

E. Confidential Information: "Confidential Information" means information consisting of 'Proprietary Information' as defined by Section 3D, and any information received by the Contractor by reason of the Contract which would not be otherwise made available were it not for the authority or perceived authority of the Contract. Confidential Information may be received by the Contractor from sources including but not limited to: SA; federal, state, county, and local government agencies; its employees and contractors; individuals receiving services, service providers, and service professionals.

The Contractor shall protect and maintain all Confidential Information gained by reason of this Contract against unauthorized use, publication, sale, access, disclosure, modification or loss. In particular, the Contractor shall not divulge names, personal information, or any other information obtained during the course of their work pursuant to this Contract without the expressed written consent from SA. Contractor shall employ reasonable security measures to protect and maintain Confidential Information, which may include, but not be limited to: restricted access only to authorized personnel;

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physically securing computers, documents, or media; securing electronically transmitted data; sending documents via trusted systems; returning documents to SA upon request; shredding of documents where if the return of documents is not requested; notification to SA of potential compromises of Confidential Information.

It is further understood that in addition to the requirements of confidentiality in this section and Section 3D, Contractor will comply with any confidentiality requirements contained in any Addendum to this contract or in any SOW.

4. Hold Harmless and Indemnification:

SA shall be held free of liability and the Contractor shall hold harmless, defend, and indemnify SA from any and all claims and losses, which may result from Contractor's activities on any referral under this Contract. The Contractor agrees it is financially responsible and liable for any audit that may occur due to its negligence or its failure to comply with the terms of this Contract. Additionally, Contractor agrees to indemnify, pay the defense costs of, and hold SA and its successors, officers, directors, and employees harmless from any and all actions, causes of action, claims, demands, costs, liabilities, expenses, and damages (including attorney's fees) arising out of, or in connection with a) any claim for bodily or psychological injury, death, or property damage to the extent caused by Contractor in connection with the Services, b) any claim that the Services infringe any legal right of any third party, or c) any other claim that, if true, would constitute a breach of Contractor's representations or obligations herein, provided that Contractor i) is notified immediately after SA receives notice of such claim; and ii) received SA's cooperation in the defense or settlement of such claim. Notwithstanding the foregoing, SA reserves the right to control the defense to any claim described above. In the event SA chooses to defend itself, SA will cooperate in the defense or settlement of such claim. In the event SA controls the defense to a claim, this defense will not affect the Contractor's duty to indemnify SA.

5. Other Provisions:

A. Intellectual Property: In performing under this Contract, Contractor may choose to utilize the intellectual property of Contractor or SA (collectively "the Owner") to fulfill the requirements of an active and executed SOW. Intellectual property may include, but is not limited to, pre-existing software, ideas, concepts, know-how, tools, models, processes, methodologies, techniques, documents and other materials (including any enhancements or modifications thereto) which have been originated or developed by the Owner or have been purchased by or licensed to the Owner (collectively, the "Pre-Existing Materials"). To the extent performance under this Contract involves the use of Pre-Existing Materials, each party grants to the other party a limited, non-exclusive, non-transferable license to use the Pre-Existing Materials for SA's internal business use. The parties may not resell, redistribute, republish, reverse-engineer, translate, modify or make derivative works of the Pre-Existing Materials without the Owner's express prior written consent. The terms contained herein refer only to Pre-Existing Materials and are not subject to materials expressly created through the course of a SOW that are considered Work Made for Hire, with SA being the Owner of such materials.

B. Work Made for Hire: Any materials created by the Contractor, expressly as part of any work under any SOW issued under this Contract ("Materials") shall be considered "work made for hire," as defined by the United States Code, Title 17, Chapter 1, Section 101, and shall be owned solely and exclusively by SA. If, for any reason, any such Materials do not constitute a "work made for hire," Contractor hereby irrevocably assigns to SA, in each case without additional consideration, all right, title, and interest throughout the world in Materials. Any assignment of copyrights under this Agreement includes all rights of paternity, integrity, disclosure, and withdrawal and any other rights that may be known as "moral rights" (collectively, "Moral Rights"). Contractor hereby irrevocably waives, to the extent permitted by applicable law, any and all claims Contractor may now or hereafter have in any jurisdiction to any Moral Rights with respect to the Materials. SA will utilize any "work made for hire"

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materials created by the Contractor in the manner deemed appropriate by the agency. These materials shall include but are not limited to: electronic and hard copies of documents, reports, training materials, surveys, pictures, books, audio and video recordings, computer programs.

C. Insurance Requirements: Without limiting the Contractor's indemnification, the Contractor shall maintain during the performance of any SOW, under which it is thus required, liability insurance with not less than a combined single limit of \$1,000,000.00 for each occurrence, personal injury, and property damage liability. This shall not be reduced or canceled without 10 days written notice to Service Alternatives, Inc. Termination of insurance shall result in immediate cessation of all activity for the SOW, under which insurance is required. To the extent that any applicable Addendum requires different or additional amounts or types of insurance coverage, the terms of the applicable Addendum control over the provisions of this Section.

D. Applicable Law/Arbitration: This Contract shall be governed by and construed and enforced in accordance with and subject to the laws of the State of Washington without regard to conflict of laws principles. The exclusive venue for any dispute arising from this Contract shall be Superior Court in King County, Washington. The parties may agree on alternative dispute resolution such as mediation or arbitration.

E. Applicable Laws & Debarment: Contractor agrees to abide by all pertinent state and federal, state, and local laws and regulations in the performance of its obligations hereunder. Furthermore, Contractor certifies that neither Contractor nor any employee or agent of Contractor who may perform services under any SOW related to this Contract is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal or State department or agency from participating in transactions. Notice must be immediately given if Contractor should become excluded or debarred. SA may immediately terminate this Addendum and any related SOW by providing Contractor written notice if Contractor becomes debarred during the term hereof

F. Notice Regarding Financial Fraud and Abuse: SA is committed to the prevention, detection, reporting and correction of fraud, waste, abuse, fiscal mismanagement and misappropriation of funds as well as any other ethical violations. False Claims Act(s) shall be promptly reported, investigated and remedied, as appropriate and required by state and federal law(s).

- i. Contractor agrees and acknowledges that Contractor and all employees and agents of Contractor who perform Services under any SOW or this Contract, has a professional obligation to
  - a. Comply with all laws, regulations, codes, and policies that regulate the Services.
  - b. Report known or suspected violation of ethical/professional codes of conduct or any fraud, abuse, theft or other unlawful activity without fear of reprisal or retaliation (See Reporting Procedure)
  - c. Participate in any investigation when asked and to help provide solutions to prevent further occurrences of alleged violations
- ii. Governing Mandates Include
  - a. DRA—Deficit Reduction Act of 2005—§6031 and 6032
  - b. Title 31 U.S.C. §3729-3733—Federal False Claim Act
  - c. Title 31 U.S.C. §3801-3812—Program Fraud Civil Remedies Act of 1986
  - d. RCW 48.80—Health Care False Claim Act—FCA
  - e. RCW 74—Washington Medicaid Fraud False Claims Act Amended 1/12

- iii. Potential Violations may include but are not limited to:
  - a. Knowingly billing for hours/services not provided
  - b. Knowingly falsifying cost and/or expense reports
  - c. Knowingly misrepresenting services provided in a manner to seek higher reimbursement
  - d. Knowingly falsifying, altering or destroying documents related to or to secure reimbursement
  - e. Knowingly concealing, avoiding or decreasing an obligation to pay money owed to government

iv. Administrative Remedies and Penalties

Contractor acknowledges and agrees that Contractor understands that violation(s) of this provision and/or any actual acts related to fraud, waste and abuse may have severe consequences including, but not limited to, civil and criminal penalties as allowed under applicable federal and state laws, including the False Claims Act and Washington Medicaid Fraud False Claims Act.

G. Notice: All written notices or other written communications required under this Contract or any SOW shall be deemed properly given when provided to the parties entitled thereto by personal delivery (including delivery by commercial services such as messengers and airfreight forwarders), by electronic means (such as by electronic mail, telex or facsimile transmission) or by mail sent registered or certified mail, postage prepaid at the addresses (or to such other address of a party designated in writing by such party to the others) provided below:

If to Services Alternatives:

Service Alternatives, Inc.  
 Attn: Technical Assistance Administrator  
 P.O. Box 5010  
 Lynnwood, WA 98046  
 E-mail: elizabeth.kittel@servicealternatives.com  
 Fax: 866-703-6615

If to Contractor:

Name \_\_\_\_\_  
 Attn: \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Email \_\_\_\_\_

H. No Authority to Bind SA: Neither the Contractor nor any partner, agent, or employee of the Contractor has authority to enter into contracts that bind SA or create obligations on the part of SA without the prior written authorization of SA. Contractor however, shall not be bound by SA from entering into any contract to provide services to other entities, except any contract which would require the Contractor to violate the Contract and/or SOW with SA. Neither the Contract nor any previously executed SOWs shall bind or obligate SA to provide the Contractor future opportunities to provide Services.

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I. Term and Termination: The term of this Contract shall remain in effect hereafter until such time as either SA or the Contractor terminate this Contract in writing, at either party's sole discretion. Should either party choose to terminate this Contract prior to the completion of a SOW, the terms contained herein shall remain in effect until such time as the terms of the SOW are fulfilled, the Contractor provides alternate means of fulfilling the terms of the SOW with prior approval from SA, or the Contractor is released in writing by SA from the terms of the SOW.

J. Supplements to Contract: It is further agreed that the Contractor will submit the following materials to SA, prior to or along with this signed contract

- i. IRS W-9 form.
- ii. Copy of current resumé, curriculum vitae, and/or biographical sketch for individuals and a statement of qualifications for organizations/businesses.
- iii. Proof of Washington business license (including UBI number) and registration with the State of Washington for payment of all taxes as may be due under this Contract.

Contractor may also be required to submit the following materials, if identified as such within SOW. Submitting these materials prior to or along with this signed contract, shall expedite execution of such SOWs.

- iv. Appropriate certifications and other defining qualifications (as defined in SOW).
- v. Copy of applicable liability insurance, as defined in section 5D above, dependent upon the nature of the work being performed through the SOW.
- vi. Criminal Background Check.

K. Counterparts: This Contract may be executed in counterparts, each of which shall be deemed an original, but all of which together will constitute one and the same instrument.

L. Advice of Counsel: Each party acknowledges that, in executing this Contract, such party has had the opportunity to seek the advice of independent legal counsel, and has read and understood all of the terms and provisions of this Contract. This Contract shall not be construed against any party by reason of the drafting or preparation thereof.

IN WITNESS WHEREOF the parties hereto have executed this Contract as of the Effective Date.

**CONTRACTOR**

**SERVICE ALTERNATIVES, INC.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Elizabeth Kittel (Administrator)  
Name (and title)

Contractor's Initials \_\_\_\_\_



**SA Training Institute**  
PO BOX 5010  
Lynnwood, WA 98046  
www.servicealternatives.com

**Tel:** (206) 209-9485  
**Fax:** (866)703-6615

## **DDA TECHNICAL ASSISTANCE ADDENDUM**

This DDA Technical Assistance Addendum (“Addendum”) dated \_\_\_\_\_, supplements and is incorporated into the terms and conditions of the Contract for Referral of Training/Consultation Services (the “Contract”), dated \_\_\_\_\_, by and between Service Alternatives, Inc., a Washington corporation (“SA”), and \_\_\_\_\_, (“Contractor”), as it may be amended from time to time. Any terms used in this Addendum but not defined herein shall have the meaning given to such terms in the Contract. The Services shall be performed by Contractor in accordance with and subject to the terms and conditions of this Addendum and the Contract. In the event of any conflict between the terms of this Addendum and the terms of the Contract, the terms of the Contract shall govern unless the Contract specifically provides otherwise.

1. **BENEFICIARY OF SERVICES:** Washington State Department of Social & Health Services (“DSHS”), Developmental Disabilities Administration (“DDA”)
2. **SERVICES TO BE PROVIDED:** Provision of technical assistance, training, and related educational information to clients of DDA, their families, DDA field and residential staff, and providers who support DDA clients, as more specifically set forth in any Statement of Work (“SOW”) that may be issued under the Contract as supplemented by this Addendum.
3. **ANCILLARY DOCUMENTS:** Contractor will provide and maintain for the duration of this Addendum, the following current documentation (check as applicable):
  - Background Check
  - Insurance (See requirements in §19 below and/or in the applicable SOW.)
  - Certification:
4. **EVALUATIONS:** Contractor will provide certificates to attendees documenting hours. Certificates will be issued to attendees at the end of each session or will be mailed by the Contractor to attendee’s address provided. Contractor will request that all attendees sign in on a roster, will provide SATI evaluations to all attendees at the end of class, and will return evaluations from 90% of attendees to SA within 30 days of the end of training. Contractor agrees and understands that payment of invoice will not be due and owing and will not be issued by SA until the roster and SATI evaluations have been received by SA.
5. **CONFIDENTIALITY:**
  - a. The Contractor shall not use, publish, transfer, sell or otherwise disclose any Confidential Information gained by reason of any SOW for any purpose that is not directly connected with Contractor’s performance of the Services contemplated hereunder, except
    - i. as provided by law, or

- ii. in the case of Personal Information, with the prior written consent of the person or personal representative of the person who is the subject of the Personal Information.
- b. The Contractor shall protect and maintain all Confidential Information gained by reason of any SOW performed under this Addendum against unauthorized use, access, disclosure, modification or loss. This duty requires the Contractor to employ reasonable security measures, which include restricting access to such Confidential Information by:
  - i. Allowing access only to staff that have an authorized business requirement to view the Confidential Information.
  - ii. Physically securing any computers, documents, or other media containing the Confidential Information.
  - iii. Ensure the security of Confidential Information transmitted via fax or e-mail by:
    - 1. Verifying the recipient phone number or e-mail address to prevent accidental transmittal of Confidential Information to unauthorized persons;
    - 2. Communicating with the intended recipient before transmission to ensure that the fax or e-mail will be received only by an authorized person; and
    - 3. Verifying after transmittal that the fax or e-mail was received by the intended recipient.
  - iv. When transporting six (6) or more records containing Confidential Information, outside a Secured Area, do one or more of the following as appropriate:
    - 1. Use a Trusted System;
    - 2. Encrypt the Confidential Information, including:
      - a. Encrypting email and/or email attachments which contain the Confidential Information; and
      - b. Encrypting Confidential Information when it is stored on portable devices or media, including but not limited to laptop computers and flash memory devices; and
  - v. Send paper documents containing Confidential Information via a Trusted System.
- c. Upon request by SA or DSHS, upon completion of the Services contemplated under any SOW, or when no longer needed in connection with the performance of any SOW, Confidential Information shall be returned to DSHS, or Contractor shall certify in writing that they employed a DSHS approved method to destroy the information. Contractor may obtain information regarding approved destruction methods from the DSHS Contact.
- d. The compromise or potential compromise of Confidential Information must be reported to SA within one (1) business day of discovery. Contractor must also take actions to

mitigate the risk of loss and comply with any notification or other requirements imposed by law, by SA, or by DSHS.

6. CONTRACTUAL RELATIONSHIP: Contractor agrees and acknowledges that neither Contractor nor any of Contractor's employees are employees or agents of SA, DSHS or DDA and will not hold themselves out as, nor claim to be, an officer or employee of SA, DSHS or DDA by reason hereof, nor will Contractor or Contractor's employees or agents make any claim of right, privilege or benefit that would accrue to officers or employees of SA, DSHS, or DDA.
7. INSPECTION: The Contractor shall, at no additional cost, provide SA, DSHS and the Office of the Washington State Auditor with reasonable access to Contractor's place of business, Contractor's records, and DSHS client records, wherever located. These inspection rights are intended to allow SA, DSHS and the Office of the Washington State Auditor to monitor, audit, and evaluate the Contractor's performance and compliance with applicable laws, regulations, and the Contract, Addendum, and SOW terms. These inspection rights shall survive for six (6) years following the termination or expiration of this Addendum.
8. MAINTENANCE OF RECORDS: The Contractor shall maintain records relating to any SOW issued pursuant to this Addendum and the Contract, and the performance of the Services described therein. The records include, but are not limited to, accounting procedures and practices, which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of any SOW. All records and other material relevant to any SOW shall be retained for six (6) years after expiration or termination of the SOW.

If any litigation, claim, or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

9. SURVIVABILITY: The terms and conditions contained in this Addendum which, by their sense and context, are intended to survive the expiration or termination of this Addendum shall survive.
10. CONTRACT RENEGOTIATION, SUSPENSION, OR TERMINATION DUE TO CHANGE IN FUNDING: If the funds DSHS relied upon to establish its agreement with SA are withdrawn, reduced or limited, or if additional or modified conditions are placed on such funding, after the date of this Addendum but prior to the completion of the Services under any SOW:
  - a. At SA's discretion, any SOW related to the Addendum may be renegotiated taking into consideration the revised funding conditions.
  - b. At DSHS's discretion, DSHS may give notice to Contractor and/or SA to suspend performance when DSHS determines that there is reasonable likelihood that the funding insufficiency may be resolved in a timeframe that would allow Contractor's performance to be resumed prior to the completion of any SOW related to the Addendum in the ordinary course.
    - i. During the period of suspension of performance, each party will inform the other of any conditions that may reasonably affect the potential for resumption of performance.
    - ii. When DSHS determines that the funding insufficiency is resolved, it will give SA written notice to resume performance. Upon the receipt of this notice,

Contractor will provide written notice to SA informing SA whether it can resume performance and, if so, the date of resumption. For purposes of this subsection, “written notice” may include email.

- iii. If the Contractor’s proposed resumption date is not acceptable to DSHS and an acceptable date cannot be negotiated, SA may terminate the applicable SOW by giving written notice to Contractor. The parties agree that the SOW will be terminated retroactive to the date of the notice of suspension. SA shall be liable only for payment in accordance with the terms of the SOW for Services rendered prior to the retroactive date of termination.
  - c. SA may immediately terminate this Addendum and any SOW by providing written notice to the Contractor. The termination shall be effective on the date specified in the termination notice. SA shall be liable only for payment in accordance with the terms of any SOW for Services rendered prior to the effective date of termination. No penalty shall accrue to SA in the event the termination option in this section is exercised.
11. WAIVER: The Director of Service Alternatives Training Institute or duly assigned designee is the only representative of SA that has the authority to waive any term or condition of this Addendum on behalf of SA.
  12. OVERPAYMENTS. If SA learns that Contractor has been paid unallowable costs under any SOW issued under this Addendum, Contractor agrees that SA may require the Contractor to reimburse SA or deduct any overpayment from a future payment that may be due to Contractor.
  13. INDEMNIFICATION AND HOLD HARMLESS: Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend, and hold harmless SA, Washington State and/or its agencies, officials, agents, or employees. Nothing in this Section shall be construed as a modification or limitation on the Contractor’s obligation to procure insurance in accordance with any SOW issued pursuant to this Addendum or the scope of said insurance.
  14. TERMINATION:
    - a. SA may immediately terminate this Addendum and any SOW issued thereunder, in whole or in part, by written notice to the Contractor if SA has a reasonable basis to believe that the Contractor has:
      - i. Failed to meet or maintain any requirement for contracting with DSHS;
      - ii. Failed to protect the health or safety of any DSHS client;
      - iii. Failed to perform under, or otherwise breached, any term or condition of any SOW or the Contract or this Addendum; or
      - iv. Violated any applicable law or regulation.



- b. Contractor may terminate this Addendum in the event:
    - i. SA fails to submit invoices to Contractor in accordance with the terms of the Contract or this Addendum; or
    - ii. SA fails to pay Contractor the fees and expenses required under the terms of the Contract or this Addendum.
15. TERMINATION OR EXPIRATION PROCEDURE: The following terms and conditions apply upon Addendum termination or expiration:
- a. The Contractor shall cease to perform any Services required by any SOW as of the effective date of termination or expiration.
  - b. The Contractor shall comply with all instructions contained in the termination notice.
  - c. The Contractor shall immediately deliver to SA all DSHS property in the Contractor's possession. The Contractor grants DSHS and SA the right to enter upon the Contractor's premises for the sole purpose of recovering any DSHS property that the Contractor fails to return within ten (10) calendar days of the effective date of termination or expiration of this Addendum or any SOW issued hereunder. Upon failure to return DSHS property within ten (10) calendar days, the Contractor shall be charged with all reasonable costs of recovery, including transportation and attorney fees and costs (if any).
  - d. SA shall be liable only for payment required under the terms of any SOW rendered up to the effective date of termination or expiration.
  - e. Contractor authorizes SA to withhold a sum from the final payment under any SOW to the Contractor that SA reasonably determines is necessary to protect SA against loss or additional liability.
  - f. The rights and remedies provided to SA in this Section are in addition to any other rights and remedies provided at law, in equity, and/or under the Contract or this Addendum, including consequential and incidental damages.
16. TREATMENT OF PROPERTY: Upon termination or expiration of this Addendum, all property owned by SA or DSHS that may have been used by Contractor in connection with any SOW shall remain with SA or DSHS, as applicable. If Contractor purchased or furnished any property at SA's request and SA has reimbursed Contractor for the purchase price, title to such property shall pass to and vest in SA. The Contractor shall protect, maintain, and insure all SA and DSHS property that may be used by the Contractor against loss or damage.
17. CONTRACTOR WILL NOT MANDATE INDIVIDUAL ARBITRATION AND CLASS OR COLLECTIVE ACTION WAIVER AS A CONDITION OF EMPLOYMENT:
- a. "Mandatory Individual Arbitration Clause" or "Class or Collective Action Waiver" means an arbitration clause or waiver in an employment contract which precludes employees from resolving employment disputes with their employer through class or collective proceedings in federal court. Instead, employees must bring individualized arbitration proceedings against their employer to resolve any employment disputes.

- b. Contractor certifies that Contractor does not require employees to agree to a Mandatory Individual Arbitration Clause or Class or Collective Action Waiver as a condition of employment.
  - c. Contractor must notify SA within ten (10) business days if, during the term of this Addendum, Contractor requires employees to agree to a Mandatory Individual Arbitration Clause or Class or Collective Action Waiver as a condition of employment, in which case SA reserves the right to terminate this Addendum.
18. SPECIFIED PERSONNEL: Any proposal by Contractor for changes, replacement, or substitution of the Specified Personnel during the term of any SOW shall be submitted to SA in writing. SA shall have the sole discretion to accept or reject such proposal. If SA does not accept Contractor's proposed change and Contractor is unable to provide acceptable personnel to SA within twenty (20) business days after the originally assigned personnel have left, then SA may terminate this Addendum and any SOW issued thereunder.

19. INSURANCE:

In the performance of any SOW issued pursuant to this Addendum, the Contractor may be required to provide or procure any or all of the following insurance coverage and comply with any or all of the requirements below. Each SOW will specify which of the following insurance requirements must be met. If the SOW does not specify any particular requirements, the Contractor shall at all times comply with all of the following insurance requirements.

a. General Liability Insurance

The Contractor shall maintain Commercial General Liability Insurance, or Business Liability Insurance, including coverage for bodily injury, property damage, and contractual liability, with the following minimum limits: Each Occurrence - \$1,000,000; General Aggregate - \$2,000,000. The policy shall include liability arising out of the parties' performance under this Contract, including but not limited to premises, operations, independent contractors, products-completed operations, personal injury, advertising injury, and liability assumed under an insured contract. SA, the State of Washington, Department of Social & Health Services (DSHS), its elected and appointed officials, and each of their respective agents and employees, shall be named as additional insureds.

In lieu of general liability insurance mentioned above, if the Contractor is a sole proprietor with less than three contracts, the Contractor may choose one of the following three general liability policies but only if attached to a professional liability policy, and if selected the policy shall be maintained for the life of any SOW:

Supplemental Liability Insurance, including coverage for bodily injury and property damage that will cover the Contractor wherever the service is performed with the following minimum limits: Each Occurrence - \$1,000,000; General Aggregate - \$2,000,000. SA, the State of Washington, Department of Social & Health Services (DSHS), its elected and appointed officials, and each of their respective agents and employees shall be named as additional insureds.

or

Workplace Liability Insurance, including coverage for bodily injury and property damage

that provides coverage wherever the service is performed with the following minimum limits: Each Occurrence - \$1,000,000; General Aggregate - \$2,000,000. SA, the State of Washington, Department of Social & Health Services (DSHS), its elected and appointed officials, and each of their respective agents and employees shall be named as additional insureds.

or

Premises Liability Insurance and provide services only at Contractor's recognized place of business, including coverage for bodily injury, property damage with the following minimum limits: Each Occurrence - \$1,000,000; General Aggregate - \$2,000,000. SA, the State of Washington, Department of Social & Health Services (DSHS), its elected and appointed officials, and each of their respective agents and employees, shall be named as additional insureds.

b. Business Automobile Liability Insurance

The Contractor shall maintain a Business Automobile Policy on all vehicles used to transport clients, including vehicles hired by the Contractor or owned by the Contractor's employees, volunteers or others, with the following minimum limits: \$1,000,000 per accident combined single limit. The Contractor's carrier shall provide DSHS and SA with a waiver of subrogation or name DSHS and SA as an additional insured.

c. Professional Liability Insurance (PL)

The Contractor shall maintain Professional Liability Insurance or Errors & Omissions insurance, including coverage for losses caused by errors and omissions, with the following minimum limits: Each Occurrence - \$1,000,000; Aggregate - \$2,000,000.

d. Worker's Compensation

The Contractor shall comply with all applicable Worker's Compensation, occupational disease, and occupational health and safety laws and regulations. Neither SA, the State of Washington nor DSHS shall be held responsible for claims filed for Worker's Compensation under RCW 51 by the Contractor or its employees under such laws and regulations. Contractor agrees to indemnify and hold harmless SA, the State of Washington, and DSHS for any claims brought against them pertaining to any injury related to the performance of the Services.

e. Employees and Volunteers

The Contractor shall maintain coverage for the acts and omissions of the Contractor's employees and volunteers. In addition, the Contractor shall ensure that all employees and volunteers who use vehicles to transport clients or deliver Services have personal automobile insurance and current driver's licenses.

f. Subcontractors

The Contractor shall ensure that all subcontractors have and maintain insurance with the same types and limits of coverage as required of the Contractor under this Addendum. The Contractor may request, and SA may approve, exempting subcontractors from some or all of

the insurance requirements of this Addendum. The Contractor remains responsible for the acts and omissions of all subcontractors.

g. Separation of Insureds

All insurance policies shall include coverage for cross liability and contain a "Separation of Insureds" provision.

h. Insurers

The Contractor shall obtain insurance from insurance companies identified as an admitted insurer/carrier in the State of Washington, with a Best's Reports' rating of B++, Class VII, or better. Surplus Lines insurance companies will have a rating of A-, Class VII, or better.

i. Evidence of Coverage

The Contractor shall, upon request by SA, submit a copy of the Certificate of Insurance, policy, and additional insured endorsement for each coverage required of the Contractor under this Addendum. The Certificate of Insurance shall identify SA and the Washington State Department of Social and Health Services as the Certificate Holders. A duly authorized representative of each insurer, showing compliance with the insurance requirements specified in this Addendum, shall execute each Certificate of Insurance.

The Contractor shall maintain copies of Certificates of Insurance, policies, and additional insured endorsements for each subcontractor as evidence that each subcontractor maintains insurance as required by this Addendum.

j. Material Changes

The insurer shall give SA 45 days advance written notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the insurer shall give SA 10 days advance written notice of cancellation.

k. General

By requiring insurance, SA does not represent that the coverage and limits specified will be adequate to protect the Contractor. Such coverage and limits shall not be construed to relieve the Contractor from liability in excess of the required coverage and limits and shall not limit the Contractor's liability under the indemnities granted to SA, the State of Washington, or DSHS in this Addendum. All insurance provided in compliance with this Addendum shall be primary as to any other insurance or self-insurance programs afforded to or maintained by SA.

l. Waiver

The Contractor waives all rights, claims and causes of action against SA, the State of Washington and DSHS for the recovery of damages to the extent said damages are covered by insurance maintained by Contractor.

20. **DISPUTES:** Contractor and SA agree that, the existence of a dispute notwithstanding, they will continue without delay to carry out all their respective responsibilities under any SOW issued

pursuant to this Addendum that are not affected by the dispute.

21. DUNS Number. In accordance with the Federal Funding Accountability and Transparency Act (FFATA, Public Law 109-282) implemented on October 1, 2010, Contractor must provide their data universal number system (DUNS) number. The Contractor's DUNS Number is \_\_\_\_\_. If the DUNS Number changes, the Contractor must immediately notify SA and provide the correct DUNS Number.
22. TERM AND TERMINATION: The term of this Addendum shall remain in effect hereafter until such time as either SA or the Contractor terminate this Addendum or the Contract in writing, at either party's sole discretion.
23. COUNTERPARTS: This Addendum may be executed in counterparts, each of which shall be deemed an original, but all of which together will constitute one and the same instrument
24. ADVICE OF COUNSEL: Each party acknowledges that, in executing this Addendum, such party has had the opportunity to seek the advice of independent legal counsel, and has read and understood all of the terms and provisions of this Addendum. This Addendum shall not be construed against any party by reason of the drafting or preparation thereof
25. APPLICABLE LAW/ARBITRATION: This Addendum is governed by the same applicable law and arbitration requirements as the Contract.
26. DEFINITIONS: The words and phrases listed below, as used in this addendum shall each have the following definitions:
  - a. "Confidential Information" means information that is exempt from disclosure to the public or other unauthorized persons under RCW 42.56 or other federal or state laws. Confidential Information includes, but is not limited to, Personal Information.
  - b. "Contractor" means the individual or entity providing services pursuant to this Addendum and includes the Contractor's owners, members, officers, directors, partners, employees, and/or agents.
  - c. "Encrypt" means to encode Confidential Information into a format that can only be read by those possessing a "key;" a password, digital certificate or other mechanism available only to authorized users. Encryption must use a key length of at least 256 bits for symmetric keys, or 2048 bits for asymmetric keys. When a symmetric key is used, the Advanced Encryption Standard (AES) must be used if available.
  - d. "Personal Information" means information identifiable to any person, including, but not limited to, information that relates to a person's name, health, finances, education, business, use or receipt of governmental services or other activities, addresses, telephone numbers, social security numbers, driver license numbers, dates of birth, Social Security number, other identifying numbers, and any financial identifiers.
  - e. "Physically Secure" means that access is restricted through physical means to authorized individuals only.
  - f. "Secured Area" means an area to which only authorized representatives of the entity possessing the Confidential Information have access. Secured Areas may include

buildings, rooms or locked storage containers (such as a filing cabinet) within a room, as long as access to the Confidential Information is not available to unauthorized personnel.

- g. "Tracking" means a record keeping system that identifies when the sender begins delivery of Confidential Information to the authorized and intended recipient, and when the sender receives confirmation of delivery from the authorized and intended recipient of Confidential Information.
- h. "Trusted Systems" include only the following methods of physical delivery: (1) hand-delivery by a person authorized to have access to the Confidential Information with written acknowledgement of receipt; (2) United States Postal Service ("USPS") first class mail, or USPS delivery services that include Tracking, such as Certified Mail, Express Mail or Registered Mail; (3) commercial delivery services (e.g. FedEx, UPS, DHL) which offer tracking and receipt confirmation; and (4) the Washington State Campus mail system. For electronic transmission, the Washington State Governmental Network (SGN) is a Trusted System for communications within that Network.

The Contract, Addendum and any SOW issued pursuant to this Addendum contain all terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this agreement shall be deemed to exist or to bind any of the parties hereto, except by an official addendum issued, agreed to, and signed by all parties below.

**[CONTRACTOR]**

**SERVICE ALTERNATIVES, INC.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

Administrator

\_\_\_\_\_  
Title

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Date

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Date