How to Improve the Design and Delivery
of High-Quality Technical Assistance

Educators often use the term *technical assistance* to define services delivered or received in the pursuit of school- and district-improvement initiatives. More specifically, technical assistance can be defined as any assistance that identifies, selects, or designs research-based solutions and practices to support school improvement (Mattson & McDonald, 2005).

This month's newsletter focuses on the critical role collaboration plays when school districts and technical assistance providers formulate, implement, and evaluate a technical assistance plan. Collaboration requires an investment of time on the parts of both the district and the provider; however, it increases the likelihood that the resulting technical assistance will be designed appropriately; delivered efficiently; and, most importantly, result in an improvement in targeted areas.

The evidence suggests that the risks of failure are high when collaboration is not present. If a technical assistance provider makes unilateral plans, these plans may be difficult for the district to integrate into its current practices; or the assistance suggested might not address the problem facing the school district. Research indicates that the degree of success in a technical assistance plan implementation is related to the amount of buy-in from the district (Datnow & Stringfield, 2000). Research also indicates that collaboratively assessing client strengths and progress and clarifying what the technical assistance will offer are strategies that increase trust in technical assistance providers (Laguarda, 2003). Collaboration may be one of the most important mechanisms determining the success or failure of technical assistance.

Beverly Mattson and Linda McDonald presented *Planning and Evaluating Effective Technical Assistance for School Improvement* at the 2005 National Association of State Title I Directors (NASTID) Conference. They identify the essential steps in developing effective technical assistance as investigation, planning and implementation, and evaluation. Portions of their presentation are highlighted here to illustrate how working together through a structured process can help both the district and the provider achieve the goal of designing and implementing technical assistance that results in improvement.

Investigation

Mattson and McDonald identify collaborative investigation of needs as the first step in determining what technical assistance should take place. Working together as a team, the district and provider should study strengths and weaknesses, seek data and input from many sources (e.g., teachers, students, parents, administrators), and determine what is working for the district and what should be changed. Once these data are collected and analyzed, the highest priority needs should be identified (Mattson & McDonald, 2005). Only at this point can the team get an accurate picture of what should be addressed through technical assistance. For example, during the investigation stage, a district might discover that a specific group of students consistently misses annual achievement targets. Although many identified needs contribute to this problem, the team, using the process described above, determines that their most important need is professional development that focuses on differentiating instruction. By addressing this top-priority need, the team believes they stand the greatest chance of closing the achievement gap between these at-risk students and the rest of the student body.

Planning and Implementation

Once needs have been prioritized and identified for action, the district and provider must pose the question, "What do we hope to accomplish with technical assistance?" The importance of answering this question clearly and precisely cannot be overemphasized, since understanding the purpose is essential to the successful completion of the remaining steps Mattson and McDonald suggest. In the hypothetical district described above, for instance, team members decide that the broad purpose of the technical assistance will be to increase the range of strategies that teachers understand and use in instruction.

Once a clear purpose for the technical assistance has been established, Mattson and McDonald advise that the team establish specific goals and objectives. They suggest creating SMART goals (i.e., specific, measurable, attainable, realistic, time-bound) that identify exactly what the technical assistance team will accomplish. (For more information, go to www.goal-setting-guide.com/smart-goals.html). Mattson and McDonald suggest using action words such as "develop" or "change" in creating the goal statements to achieve a clear picture of the desired outcomes. For example, district officials and technical assistance providers agree that they want to *familiarize* staff members with research, *model* differentiated instruction, *establish* laboratory classrooms, and *institute* a system of peer observation.

Once goals have been established, the next step is creating objectives that define the steps required to achieve the goal. These steps also should be specific and measurable as well as identify the person or persons responsible for achieving them and the length of time it will take to accomplish them (Mattson & McDonald, 2005). Objectives likely to achieve the goal might include starting study groups, developing a peer-observation process, or providing an on-site instructional coach. The team would go on to complete these objectives by identifying, for instance, who would initiate the study groups, how and when peer observers would be trained, the specific number of teachers with whom the coach would meet, and the time period in which the coaching would occur. Discussion and full agreement on these objectives will ensure that both the district and provider choose methods of delivery that fit the needs of the district and the abilities and capacity of the

technical assistance provider.

When establishing goals and objectives, both the district and the provider must clarify the specific measurable outcomes they expect as a result of the technical assistance and how long it will take to reach those outcomes. They might agree that by the end of Year 1, two laboratory classrooms will be established and all teachers will have conducted at least one peer observation in a colleague's classroom.

The completed technical assistance plan, with its clear goals and specific objectives, should be given to all involved in its implementation because it is essential that the members of the technical assistance team are accountable to one another throughout the life of the plan (Mattson & McDonald, 2005). The district must be willing to share information and cooperate with the planned activities, and the provider must perform professionally and produce high-quality work. A thoughtful, carefully and collaboratively developed written plan provides an effective statement of expectations for each participant.

Mattson and McDonald suggest basing the plan on the following figure, adapted from Trohanis (2001). Figure 1 provides a checklist of the components necessary for a high-quality technical assistance plan.

Figure 1. Components of a Technical Assistance Plan

1. Goals and objectives of technical assistance: Identify specific, measurable goals and objectives for technical assistance, based on prioritized needs.

2. Anticipated outcomes of technical assistance: Identify concrete, attainable, and measurable changes that will occur as a result of technical assistance.

3a. Technical assistance services, activities, and providers: Identify which technical assistance services and activities will be provided. Identify which technical assistance providers with the necessary expertise are available to deliver the identified technical assistance services.

3b. Timelines and time commitments for technical assistance services: Identify dates for technical assistance services and activities, time commitments required of both the technical assistance provider and the client, and due dates for monitoring and evaluation checkpoints.

4. Budget and/or resources needed: Identify any anticipated costs, procedures and specifications for fee schedules, payments, or expense reimbursement.

5. Materials: Identify any materials and supplies needed and who will provide them.

6a. Monitoring of technical assistance services and outcomes: Identify protocols for technical assistance information management, data collection instruments, and who will be responsible for various protocols and collection of data.

6b. Mutual accountability: Identify how the technical assistance provider and client will be accountable to each other.

7. Evaluation plan: Plan the evaluation of the effectiveness and outcomes of technical assistance.

Evaluation

Thorough investigation and planning, however, are not sufficient to assure the success of technical assistance. It is critical that a plan is evaluated as well. A good evaluation enables the district and the provider to focus on results. Mattson and McDonald suggest an evaluation process similar to the planning process. For example, district officials and provider staff should formulate evaluation questions, such as "Were the schools and district satisfied with the services?" and "How effective were the services in accomplishing [planned] goals and objectives?" (Mattson & McDonald, 2005). Additional questions should address the areas targeted for improvement, such as "Do teachers feel more prepared to differentiate instruction?" and "Is more differentiated instruction being observed in classrooms?" Evaluation questions should address both formative issues, which can be tracked as the technical assistance is being delivered, as well as summative issues, which focus on answering the major questions outlined in the evaluation plan (Mattson & McDonald, 2005). The data collected to determine the answers to the evaluation questions and the methods used to obtain them should be identified as the evaluation questions are being developed. A thoughtful, well-organized approach to evaluation will help both the district and the provider determine how effective the technical assistance is in producing desired improvements. Mattson and McDonald suggest that results should be evaluated for continual improvement and shared with the entire school community.

In Conclusion

Districts and providers can spare themselves unnecessary frustration and expense by investing time in working together to design, deliver, and evaluate technical assistance. The payoff is well worth the initial effort, which results in greater buy-in from participants in the change, a clear sense of the reform path, and the satisfaction of working together to achieve mutually established goals. Collaboration between a district and a technical assistance provider can be a productive enterprise if approached with open minds, thoughtfulness, and respect.

References

Datnow, A., & Stringfield, S. (2000). Working together for reliable school reform. *Journal of Education for Students Placed at Risk, 5*(1/2), 183-204.

Laguarda, K. G. (2003, April). *State-sponsored technical assistance to low-performing schools: Strategies from nine states*. Presentation given at the American Educational Research Association annual meeting, Chicago. Retrieved November 16, 2005, from http://www.policystudies.com/Kate%204-15%20final.pdf

Mattson, B., & McDonald, L. (2005, January). *Planning and evaluating effective technical*

assistance for school improvement. Presentation given at the 2005 National Association of State Title I Directors conference, Atlanta, GA.

Trohanis, P. L. (2001). *Design considerations for state TA systems*. Chapel Hill, NC: National Early Childhood Technical Assistance Center, University of North Carolina.