

The Value of Technical Assistance (TA) Plans

A TA plan is designed to be a supportive resource, not a form of discipline or penalty. It is a collaborative roadmap, co-created with grantees, that outlines practical steps and provides tailored guidance for success. It offers long-term benefits by strengthening skills, enhancing partnerships, and supporting sustainability, which ultimately leads to improved outcomes for participants.

Overview

Federal grants, while exciting to receive, can also feel overwhelming, especially in the early stages. In addition to managing timelines and reporting requirements, grantees often navigate complex challenges such as training, recruiting, and retaining program leaders. This includes securing sites for program implementation, reaching and engaging their communities, maintaining program fidelity, and establishing formal partnerships through memorandums of understanding (MOUs). Logistics alone, such as scheduling workshops, coordinating across teams, and maintaining communication, can quickly become daunting.

There are also unforeseen challenges that no one plans for. Partners or sites that once seemed enthusiastic may suddenly become unresponsive or disengaged, leader training opportunities may be limited or inconsistent, and teams working across large geographic areas may struggle to coordinate or sustain engagement.

What Is a TA Plan

TA plans are developed for grantees funded by the Administration for Community Living (ACL) who are struggling to meet established participant or completer goals, most often during the first year of funding. The assigned ACL project officer determines the need for a TA plan for each grantee.

A TA plan offers a structured way to navigate these challenges. It provides clear direction through tailored guidance, resources, and support, while identifying specific areas where your organization can grow and outlining practical, achievable steps to help you get there. This may include:

- Access to targeted training and professional development
- Step-by-step coaching or mentoring
- Resource-sharing
- Ongoing check-ins to measure progress and adjust strategies

A TA plan is a collaborative effort. The grantee, technical assistance liaisons, and the ACL project officer work together to identify areas for improvement and develop strategies to address challenges with actionable solutions. Once all parties agree on the TA plan, strategies are reviewed monthly to ensure steady, measurable progress and increased capacity for improved performance.

Top Five Benefits of a TA Plan

1. **Tailored support:** Every organization has unique needs, and TA plans are customized to fit these needs while drawing up and incorporating best practices. Grantees are actively involved in every phase, from initial planning to implementation to assessing and capturing results and identifying improvements.
2. **Knowledge:** Staff gain new skills, confidence, and tools to sustain programming over the long term, building experience that can be applied to future projects, grants, and opportunities.
3. **Better outcomes:** By building on your team's strengths and focusing on growth opportunities, TA plans enhance program quality and efficiency and deepen the positive impact for participants.
4. **Stronger partnerships:** In addition to strengthening existing partnerships, TA plans often foster new connections with peers, mentors, and networks that might not otherwise be within reach. This is especially valuable during times when traditional partners may no longer have the funding or capacity to stay engaged.
5. **Sustainability:** With thoughtful planning, consistent support, effective data collection (to measure outcomes and assess opportunities), and a focus on long-term goals, organizations can sustain progress and continue to grow over time.

From the Field: From Plan to Progress

Education Health & Research International (EHRI) was awarded an ACL Chronic Disease Self-Management Education (CDSME) Programs grant in 2022. This was the first time they

began implementing CDSME programs with a handful of newly trained leaders, including the project director. The team initially struggled with delays implementing chronic disease self-management programs and diabetes self-management programs, primarily due to the retirement of key leadership within the organization holding the statewide license to provide master trainers and assist in lay leader development. Implementation delays resulted. With a limited number of program leaders, EHRI struggled to recruit participants and host workshops, despite their efforts to improve marketing strategies and the registration process by making the online platform user-friendly. Toward the end of the 2023 grant year, the EHRI team, an ACL project officer, and technical liaisons assessed the environment, identified key strategic needs, and collaboratively built a TA plan. The plan focused on program implementation, leader engagement, and marketing to strengthen their organizational capacity to achieve their grant goals and sustain program delivery.

- **Organizational capacity:** EHRI obtained its own CDSME license from the Self-Management Resource Center to recruit its own leaders from partner organizations throughout the state. This enabled EHRI to manage its leaders trained by the state department of health's master trainer through engagement activities such as newsletters, in-person and virtual meetings, and health fairs.
- **Sustainability:** To ensure program delivery and sustainability, the team updated and executed its MOU for CDSME programming with partner organizations, including senior centers, federally qualified health clinics, and health care systems. The MOUs clearly outlined the foundational structure, commitments, and mechanisms for accountability and continuity within a partnership. Many have not only embedded the CDSME programs in their standard operations but also expanded their programming to include falls prevention programs.
- **Achieving grant goals/objectives:** At the close of the first year, EHRI had only reached 3% of its participant and completer goals. After diligently engaging in the TA planning process and taking firm action steps laid out in the plan, the number of CDSME program completers grew from 40 to 463 in just two years. According to the program manager, Lon Kieffer, "The benefits were significant. We received targeted guidance and developed new insights. The TA plan not only positioned us to overcome obstacles but also allowed us to successfully maintain a partnership with our original licensed partner, to expand statewide chronic disease self-management program and diabetes self-management program capacity."