

Issue Brief

Mary Anne Anderson, Kara Conroy, Annalisa Mastri, Amanda Benton, and Gretchen Lehman

Improving the Design, Targeting, and Effectiveness of Training and Technical Assistance: A Learning Agenda

At a glance

This learning agenda identifies research activities that can inform the design, targeting, and effectiveness of training and technical assistance (TA) approaches and activities.

The agenda covers several topics for further learning:

- Testing the effectiveness of different training and TA approaches
- Designing training and TA that engages recipients
- Incorporating considerations of equitable access to and benefits from training and TA across recipient individuals and organizations
- Developing and conducting training and TA needs assessments
- Special considerations for training and TA related to cross-sector collaboration
- Funders, developers, providers, and researchers of training and TA—including those in government and philanthropy—can use this learning agenda to invest in knowledge-building activities for the field.

Many types of organizations—such as government and philanthropic agencies and private and nonprofit entities—invest in training and technical assistance (TA) to plan for change and develop innovative solutions to both long-standing and newly emerging problems.¹ *Training and TA* commonly means the transfer of knowledge, expertise, and skills to people, organizations, and communities. Programs generally use it to improve services and ensure compliance. It can reveal gaps in services or a need for new or different services, help achieve policy objectives, and advance organizations' missions.

A variety of stakeholders, including the Office of the Assistant Secretary for Planning and Evaluation (ASPE) in the U.S. Department of Health and Human

Project overview

The [Models of Coordination and Technical Assistance to Achieve Outcomes in Communities](#) project sought to document knowledge about training and TA from a literature review and interviews with training and TA funders, developers, providers, recipients, and researchers. The project focused on how to use training and TA to improve cross-sector collaboration. To solicit feedback about gaps in the knowledge base and to inform the field, ASPE convened over 30 training and TA stakeholders (technical experts) and surveyed members of an internal HHS group focused on sharing training and TA practices about topics of interest. ▀

Services (HHS), have commissioned or conducted research on training and TA. For example, ASPE sponsored [a scan of 18 federally and privately funded TA initiatives](#) that synthesized lessons, challenges, and best practices for providing TA. ASPE has also invested in learning and disseminating information about [how to best measure performance](#) of training and TA and [how to use virtual training and TA](#) to improve human services programs. Other research has documented the core elements of training and TA and relationships between those elements and implementation practices,ⁱⁱ identified valuable aspects of training and TA design,ⁱⁱⁱ and characterized the extent to which programs systematically deliver training and TA.^{iv}

Despite such research and the increasing emphasis under the Foundations for Evidence-Based Policymaking Act of 2018 on building and using evidence in federal policymaking, much remains unknown about training and TA. There is limited empirical evidence about the effectiveness of training and TA—what forms of it are effective and under what circumstances, who it can help, and how to improve its effectiveness.^v To better understand the gaps in knowledge about what works in training and TA, ASPE funded the Models of Coordination and Technical Assistance to Achieve Outcomes in Communities project (see Project overview). Under this project, ASPE and Mathematica have also explored [lessons from cross-sector collaborations](#), including the use of training and TA during such collaborations, as well as [valuable practices in assessing training and TA needs](#).

This learning agenda draws on the input of technical experts, selected HHS staff, and the previous work conducted under this project. It seeks

Key terms in this learning agenda

- **Providers** are organizations that provide training and TA.
- **Recipients** are organizations that receive training and TA from a provider.
- **Participants** are the individuals and families served by human and social services programs. ▲

to chart a path for how training and TA stakeholders might further explore these topics. While reviewing this learning agenda, readers may wish to refer to Box 1, which has information on some different research designs stakeholders can use to study these topics. The appendix summarizes the methods used to develop this learning agenda, and a separate technical appendix contains longer descriptions of the research design options and considerations for answering each possible research question.

Research topic 1: Testing the effectiveness of different training and TA approaches

Little information exists about how effective different training and TA approaches are—in other words, their impact. Some research has assessed whether receiving training and TA affects outcomes, such as recipients better meeting their goals and objectives, including targeted outcomes for program participants. However, most of the existing research has been correlational, meaning that the findings cannot tell us about training and TA effectiveness.¹

¹ A synthesis of TA models and frameworks found 11 of 25 core TA elements were related to differences in the effect sizes for changes in program, organization, and systems outcomes (Dunst et al. 2019). In particular, more intensive TA was associated with larger effect sizes compared to less intensive TA; providing TA to improve implementation fidelity was associated with the largest effect sizes. A different study suggested there are links between receiving training and TA and implementing programs with quality and fidelity (Durlak and DuPre 2008). Another reported a positive association between receiving TA and improvements in program operations or organizational capacities (West et al. 2012).

Box 1. Types of research designs

This learning agenda offers ideas for answering research questions about training and TA approaches using the following common research designs:

- **Literature reviews** are comprehensive summaries of research on a topic—in this case, training and TA—conducted to date.
- **Expert consultation** involves gathering feedback, opinions, and perspectives from a designated set of experts or stakeholders in a particular field. In the field of training and TA, possible experts include funders, providers, developers, recipients, and researchers.
- **Case studies** provide an up-close, in-depth, and detailed examination of a particular experience, such as how one organization used training or TA to solve a specific challenge.
- **Formative evaluations** assess whether a training or TA approach is feasible, appropriate, and acceptable before it is fully implemented. Formative evaluation is common during the development of a new training or TA approach or to modify or adapt an existing one.
- **Implementation evaluations** document how a training or TA approach is implemented. These evaluations often seek to understand if the approach is delivered as intended, or with fidelity.
- **Outcome evaluations** describe training or TA performance by analyzing quantitative data. An outcome evaluation might assess changes in recipients' knowledge, skills, attitudes, or behavior before and after the training or TA approach (usually called a pre-post design).
- **Impact evaluations** assess whether a training or TA approach is effective in achieving its goal or objective. This type of evaluation typically compares outcomes across two groups, one that received the training or TA being studied and one that did not or received a business-as-usual approach. There are two types of common impact evaluation designs:
 - **Randomized controlled trials:** Researchers randomly assign potential training and TA recipients to either receive training or TA (the intervention group) or not receive it (the control group). Researchers compare the outcomes of the two groups.
 - **Comparison group designs:** Researchers identify two similar groups of recipients—one that has participated in training or TA and one that has not—and compare the outcomes of the groups.
- **Cost studies** calculate and describe the costs of providing or receiving training or TA.
- **Cost-benefit analyses** compare costs against monetized outcomes from an impact evaluation to determine whether training or TA approaches are cost effective.

Adapted from "[Types of Evaluation](#)," U.S. Centers for Disease Control and Prevention and "[Improving the Rigor of Quasi-Experimental Impact Evaluations](#)," ASPE. For more information on evaluation strategies, see the U.S. Office of Management and Budget's "[Evidence and Evaluation](#)" page.

Investing in understanding the effectiveness of different training and TA approaches could help stakeholders in various ways:

- To better target training and TA approaches to the needs of recipients, funders could recommend opportunities that have proven effective for recipients with similar needs and circumstances.
- Developers and providers could provide more information about the menu of training and TA opportunities they offer with knowledge of what is most effective under certain circumstances.

- Recipients could have better information for selecting effective training and TA for their organizations, and possibly for choosing which of their staff to involve, potentially saving money and staff time.

Table 1 summarizes the research questions and designs that could shed light on the effectiveness of different training and TA approaches. Each is discussed further in the technical appendix.

Table 1. Possible research questions and design options for research topic 1: Effectiveness

Possible research questions	Research design options
<p>What training and TA approaches or activities are effective for human services organizations?</p>	<p>Randomized controlled trial (RCT)</p> <ul style="list-style-type: none"> • Identify a single training or TA approach (or activity) to study and randomly assign some recipients to receive it and some not to receive it. • The control group could receive nothing or a business-as-usual training or TA approach. • Compare outcomes by using survey or administrative data (Box 2 provides considerations for defining possible outcomes to study). • If the control group received no training or TA at all, the results would show whether the training or TA is effective at improving key outcomes. • If the control group received a different type of training or TA than the intervention group, the results would show whether one approach affects outcomes more than the other (comparative effectiveness). • Considerations: This is the most rigorous design available, but it is usually the most expensive and time consuming to conduct and assesses only the impact of the specific training or TA effort evaluated. <p>Comparison group design</p> <ul style="list-style-type: none"> • Identify two groups of recipients—one that participated in a training or TA approach (the intervention group) and one that did not (the comparison group). • Ideally, the groups would have similar characteristics, such as the type and size of recipient organization, location, and target population served. • Use administrative data to compare the outcomes of the groups. • Considerations: A comparison group design lacks random assignment, so there might be differences in the groups that account for the outcomes rather than the training and TA itself. However, this design might be more realistic to conduct given time and resource constraints.

(continued on next page)

Possible research questions	Research design options
<p>Which conditions within recipient organizations help to ensure successful implementation of training and TA?</p>	<p>Implementation evaluation</p> <ul style="list-style-type: none"> • Identify a set of sites participating in a similar training or TA approach. • Collect and analyze data from each site on presence of implementation drivers, factors that lead to successful application of the knowledge and skills taught through training and TA (such as time for staff to practice skills learned during a training and leadership support for training and TA across all levels of staff). • Data collection options include one-on-one and focus group interviews with staff and program participants, observations, staff surveys, and/or analyses of administrative data. • Considerations: An implementation evaluation cannot produce information about effectiveness on its own, but it can reveal valuable information about factors that drive implementation and could complement an impact evaluation.
<p>Which training and TA approaches are viewed as most effective or useful for human services organizations?</p>	<p>Implementation evaluation</p> <ul style="list-style-type: none"> • Identify clusters of sites participating in or using the same active training or TA approach, such as coaching or peer learning communities, or passive approach, such as webinars or online resources. • Collect and analyze data on perceived effectiveness or usefulness, using post-training or TA surveys of recipients, administrative data, and/or one-on-one and focus group interviews with staff. • Descriptively compare the perceived effectiveness across clusters using different training and TA approaches. • Considerations: Even though an implementation evaluation gets at only perceived effectiveness, unlike an RCT which gets at actual effectiveness, it is less resource intensive than an RCT.
<p>What are costs to recipients for participating in a training or TA approach?</p>	<p>Cost study</p> <ul style="list-style-type: none"> • Estimate the average costs of receiving a specific type of training or TA by collecting information on (1) time costs for participating; (2) costs of any required supplies, materials, and equipment; and (3) overhead costs. • Could use two possible subdesigns: (1) estimate costs of participating in the same training or TA from recipients that vary by size, location, and so on to estimate the average cost of receiving a particular training or TA approach; or (2) estimate costs of similar sites participating in a variety of different training and TA approaches to get a sense of average recipient costs across the range of approaches. • Considerations: Estimating an average cost for a training and TA approach that could be generalized to other sites requires a large sample of sites. To supplement the data, researchers could conduct a survey or interviews asking recipient staff members whether they perceived the training or TA as a good investment.
<p>Do the benefits of participating in training and TA exceed the costs?</p>	<p>Cost-benefit analysis</p> <ul style="list-style-type: none"> • Convert the impact evaluation results on training and TA effectiveness (these results would be produced by either the RCT or comparison group design proposed under the first research question in this table) into dollar values to express the benefits of receiving the training or TA. • Compare benefits with estimated costs from the cost study to determine whether the benefits of the training or TA exceeded the costs. • Considerations: Cost-benefit analyses require an impact evaluation, which could be resource intensive.

Box 2. Defining outcomes related to training and TA effectiveness

Before studying effectiveness, stakeholders might find value in defining what effectiveness means to them. Some might want to understand whether training and TA has an impact on organizational outcomes. Others might prioritize understanding whether training and TA can affect the outcomes of program participants.

Developing a [logic model](#) that identifies the components to study and the outcomes expected to change as a result can help stakeholders decide which outcomes to study. A [participatory approach](#) enables all stakeholders to have a say in which outcomes are important to consider.

Categories and possible outcomes related to training and TA appear below. The existing literature and the input from the technical experts for this project helped to develop these categories and outcomes:

- **Participant level:** Changes in outcomes for program participants; could be collected through survey or administrative data
- **Recipient, individual level:** Changes in recipients' knowledge, skills, behaviors, and attitudes and their satisfaction with training and TA; could be collected through survey or administrative data
- **Recipient, organization level:** Changes in recipient organizations, such as the consistency of organizational culture, and the long-term maintenance of such changes; could be collected through survey or interview data and program observations
- **Community level:** Changes in policies, processes, or procedures that are external to, but affect, recipients; changes in relationships (such as measures of collaboration or relationship strength) among different stakeholders; could be collected through document review and survey or interview data

Research topic 2: Designing training and TA that engages recipients

Adult learning principles provide some guidance on [how to engage recipients in training and TA](#). Typically, adults benefit from problem-based and collaborative learning engagements that regard the provider and recipient as equals. Training and TA should also be relevant to recipients' own work contexts and experiences. Other research, such as ASPE's [scan of TA initiatives](#), also offers some criteria on when to use different formats of TA to match certain circumstances. For example, providers might offer on-site TA for more intensive, tailored efforts, and virtual TA to reach broader audiences.

While these resources are useful, additional information on this topic could help funders, developers, and providers enhance recipients' engagement with training and TA. Collecting such information could assist funders, developers, and providers in two primary ways:

- Ensure they engage recipients in training and TA activities intended to help the recipients meet contractual or grant-related obligations or achieve other objectives
- Equip them to co-design training and TA with recipients to encourage their engagement²

Table 2 summarizes the research questions and design options that could help shed light on how to design training and TA that engages recipients. Each is discussed further in the technical appendix.

² A finding under this project—and one that particularly interested technical experts—was the potential value of providers co-creating training and TA opportunities with recipients.

Table 2. Possible research questions and design options for research topic 2: Engaging training and TA

Possible research questions	Research design options
Which training and TA designs are effective at engaging recipients?	<p>Randomized controlled trial (RCT)</p> <ul style="list-style-type: none"> • Randomly assign two groups of recipients to receive different training and TA opportunities that cover the same content but that vary in their frequency, duration, or mode. • Compare levels of engagement across the groups by using tools such as surveys and attention trackers for virtual training and TA. • Considerations: An RCT is the most rigorous design available, but depending on the specific study design, it can require substantial resources. As a qualitative complement, researchers could conduct recipient interviews to reveal ways to change the training and TA content or format to better engage recipients. Researchers could also consider smaller, quicker, rapid-cycle tests to identify ways to improve recipients' engagement.
How can stakeholders improve engagement among training and TA recipients?	<p>Outcome evaluation</p> <ul style="list-style-type: none"> • Implement an aspect of a training or TA approach in two ways (for example, using small group discussions or lectures) for the same group of recipients over time. • Assess engagement and satisfaction after the first offering and again after the second, conducting surveys after each session. • Compare outcomes of the same recipients across the two sessions to determine whether the second session was an improvement over the first. • Considerations: An outcome evaluation would not provide broadly generalizable information, but it could suggest ways to increase engagement at a lower cost than an impact evaluation. Researchers could also interview recipients for additional information on their engagement and to gather recommendations for improving content or format. It might be useful to organize participants into groups that receive the two sessions in different orders.
To encourage engagement, how might developers and providers incorporate recipients' input into the design of training and TA?	<p>Case study</p> <ul style="list-style-type: none"> • Gather and analyze in-depth information about how developers or providers and recipients worked together to develop and implement training and TA. • Conduct interviews or focus groups with stakeholders, including recipients, providers, developers, funders, and possibly participants, to provide a comprehensive view. • Considerations: A case study does not provide generalizable information, but it produces a robust and comprehensive account of how providers and recipients can work together to guide implementation in certain contexts.

Research topic 3: Incorporating considerations for equitable access to and benefits from training and TA across recipient individuals and organizations

Stakeholders are increasingly seeking to ensure that training and TA are available and targeted to different types of recipient individuals and organizations equitably. However, they have limited research on equity considerations in training and TA from which to draw. Technical experts convened for

this project, representing a variety of training and TA stakeholders, expressed a desire to inform training and TA with research-based approaches to ensuring equitable access, outreach, and value across different types of recipient individuals and organizations. They cited several factors that would benefit them:

- A framework for how to ensure equitable access and benefits across a range of people and organizations
- A better understanding of whether certain approaches to training and TA (for example, virtual versus

in-person delivery) might be more or less accessible to different types of recipients

- Learning how to design training and TA that is relevant for recipients
- Understanding who has access to training and TA, whether various communities and individuals have an equitable opportunity to gain access, and any historical legacies of inequitable access (such as for communities that are rural, tribal, or of color)
- Learning about how training and TA can incorporate the experiences of program participants to inform (and ideally strengthen) equitable provision of services

Researchers who pursue this work may wish to engage recipients at all levels to catalogue their experiences and ground the research approach in

an awareness of the various populations represented by recipients. This can help researchers identify possible disparities, such as:

- Frontline staff and program leaders could have systematic differences in their experiences.
- Some recipients might have a limited ability to participate in virtual training or TA due to internet access issues.
- Recipients from certain racial or ethnic groups could find that training or TA does not respond to their own or their communities' needs.^{vi}

Table 3 summarizes the research questions and designs that could help shed light on considerations of equitable access to and benefits from training and TA. Each is discussed further in the technical appendix.

Table 3. Possible research questions and design options for research topic 3: Equitable access to and benefits from training and TA

Possible research question	Research design options
<p>Are training and TA opportunities designed to be inclusive and equitably accessed by all recipients? Are they inclusive and accessed equitably in practice?</p>	<p>Implementation evaluation</p> <ul style="list-style-type: none"> • Observe and interview funders, developers, providers, and staff from all levels of recipient organizations about ensuring and experiencing inclusivity and accessibility. • Assess administrative attendance data to understand whether different types of recipient organizations and staff take up similar amounts of training or TA and determine which staff from the recipient organizations have access to and participate in training and TA. • Analyze the extent to which training and TA are inclusive and accessible and where there are gaps. • Considerations: Implementation evaluations cannot produce information on impacts, but they can reveal valuable information about the extent to which training and TA are inclusive and accessible. <p>Formative evaluation</p> <ul style="list-style-type: none"> • Work with training and TA stakeholders to adjust their offerings to attempt to increase equitable access. • Conduct qualitative interviews or recipient satisfaction surveys to understand if the adjustments changed recipients' experiences for the better. • Analyze the data to make recommendations that would support equitable access to training and TA providers. • Considerations: A formative evaluation's recommendations are based only on the recipient organizations that participated in the formative evaluation, which could be a small number and therefore might not be generalizable to other organizations.

(continued on next page)

Possible research question	Research design options
<p>How might program participants' experiences inform training and TA that support equitable access to services and equitable outcomes for participants?</p>	<p>Formative evaluation</p> <ul style="list-style-type: none"> Engage a small number of recipient organizations to develop and evaluate a participant-informed training and TA approach that strengthens an organization's capacity to provide services equitably. Conduct and analyze in-depth interviews with program participants to understand how their experiences with an agency, program, office, or staff member might be inequitable. Work with recipients to develop solutions that aim to address inequities that surface from the analysis, iteratively adjust organizational processes, and examine whether adjustments lead to more equitable services. Considerations: A formative evaluation cannot produce information on impacts, but it can shed light on whether a participant-informed training and TA approach might be feasible before implementing it with a broader group of recipient organizations. <p>Case study</p> <ul style="list-style-type: none"> Gather and analyze in-depth information about how providers and recipients worked together to address equity issues in recipient organizations using a participant-informed training and TA approach. Conduct interviews or focus groups with various stakeholders, including recipients, providers, and possibly participants, to provide a comprehensive view. Considerations: A case study does not yield generalizable information, but it could produce a robust and comprehensive account of recipients' experience with a participant-informed training and TA approach that might guide implementation in other contexts.

Research topic 4: Developing and conducting training and TA needs assessments

Under this project, we learned that providers use various methods to assess recipients' training and TA needs to develop and offer content that addresses those needs. Generally, a needs assessment for training and TA involves three processes:

1. Developing a plan to assess needs that takes the recipient's context into account
2. Collecting and analyzing relevant and priority data on needs
3. Agreeing with the recipient on which of the identified needs to address^{vii}

Although we have some information on how providers typically assess recipients' needs, the technical expert and HHS staff input for this project indicated that more information would be helpful. Learning more about this topic could help funders, developers, and providers in two primary ways:

- Understand which needs assessment techniques and processes providers can use, for which types of recipients, and under what contexts
- Learn more about how to best use existing needs assessment tools—such as community transformation maps, journey maps, driver diagrams, organizational assessment tools, and surveys^{viii}—to design training and TA that meets recipients' needs

Table 4 summarizes the research questions and design options that could help shed light on developing and conducting training and TA needs assessments. Each is discussed in further detail in the technical appendix.

Table 4. Possible research questions and design options for research topic 4: Needs assessments

Possible research questions	Research design options
How do providers typically develop and conduct training and TA needs assessments?	<p>Implementation evaluation</p> <ul style="list-style-type: none"> Identify a large number of providers by reviewing records of federal contracts and grants as well as peer-reviewed and grey literature on training and TA. Survey the identified providers about the tools they leverage to assess recipients' needs and about which tools they have tried and found effective or ineffective. Survey results could guide targeted in-depth interviews on why recipients regard certain tools as especially effective or ineffective under different circumstances. Considerations: An implementation evaluation cannot reveal whether needs assessment tools are effective but could provide more detailed information on available tools.
How can providers match training and TA to recipients' needs?	<p>Literature review and expert consultation</p> <ul style="list-style-type: none"> Review the implementation science literature to construct a framework and set of promising practices for stakeholders to have a common understanding of how to assess training and TA needs. Consult a variety of stakeholders, such as designers, funders, providers, recipients, and researchers, to collect feedback on the proposed framework and revise it. Considerations: To maximize the value of this approach, it might be best if the experts consulted reflect a diversity of perspectives and approaches to matching TA to recipients' needs.

Research topic 5: Special considerations for training and TA related to cross-sector collaboration

Funders, developers, providers, and recipients use training and TA during cross-sector collaborations to help local organizations work together toward shared goals, coordinate strategy, share resources, build connections among organizations, and pursue joint learning. Stakeholders interviewed for this project reported several challenges with engaging in training and TA while in cross-sector collaborations in addition to typical challenges, such as lack of time, financial resources, and staff availability. Challenges specific to cross-sector collaboration included differences in objectives and goals among training and TA recipients and balancing training

and TA opportunities from multiple providers. More information about training and TA related to cross-sector collaboration could help funders, developers, and providers in two primary ways:

- Learn how to most effectively design training and TA when bringing together recipients from different agencies, sectors, and local sites who might have different objectives
- Understand the optimal timing, intensity, and formats of cross-sector training and TA

Table 5 summarizes the research questions and design options that could help shed light on how to design and administer training and TA for cross-sector collaboration. Each is discussed in further detail in the technical appendix.

Table 5. Possible research questions and design options for research topic 5: Cross-sector collaboration

Possible research questions	Research design options
<p>What training and TA approaches are effective at creating or increasing cross-sector collaboration?</p>	<p>Randomized controlled trial (RCT)</p> <ul style="list-style-type: none"> • Randomly assign recipients to an intervention group that receives one type of training or TA for cross-sector collaboration or to a control group that receives a different type of training or TA approach or no training or TA at all. • Sites would ideally be participating in a single, large initiative that includes collaboration across sectors; have similar overarching goals and objectives for the initiative; and share key characteristics, such as a rural or urban location. • If the control group received no training or TA at all, the results would show whether the training or TA improved key outcomes related to cross-sector collaboration. • If the control group received a different type of training or TA than the intervention group, the results would show whether one type affects outcomes more than the other. • Considerations: An RCT is the most rigorous design available, but it typically requires substantial resources and might be especially challenging in the context of cross-sector collaborations, which involve a number of organizations across different sectors. <p>Comparison group design</p> <ul style="list-style-type: none"> • Researchers could compare outcomes of two groups that chose to participate in different types of training or TA while collaborating across sectors. • Considerations: Even though the lack of random assignment means that comparison group designs are less rigorous than RCTs, implementing such a study is often more feasible and requires fewer resources.
<p>How can cross-sector training and TA be improved?</p>	<p>Formative evaluation</p> <ul style="list-style-type: none"> • Adjust a cross-sector training or TA engagement for a set of recipients and then study their pre-post satisfaction, engagement, knowledge, skills, attitudes, or behaviors. • Survey recipients about whether training or TA activities were useful and how to improve them. • Analyze data to determine how to improve or strengthen the next iteration of the activity. • Considerations: Even though a formative evaluation cannot assess training and TA effectiveness, it can reveal information on perceived usefulness and possible improvements to cross-sector training and TA.
<p>How can cross-sector training and TA be designed to meet recipients' needs and engage them?</p>	<p>Case study</p> <ul style="list-style-type: none"> • Identify one or a few cross-sector collaboration efforts that included training or TA. • Interview several different types of stakeholders to provide a comprehensive and well-rounded perspective of the training or TA. • Considerations: A case study would offer practical guidance on how stakeholders can design engaging training and TA that best meet recipients' cross-sector collaboration needs.

Conclusion

This learning agenda represents an initial step toward better understanding how stakeholders can improve their use of training and TA. Training and TA funders, developers, providers, recipients, and researchers can all play roles in answering these important questions. Further understanding of these issues may also help the field work toward approaches—such as the use of core components from across studies—to synthesize evidence across studies and efforts to improve training and TA design. Ultimately, learning more about training and TA can lead to meaningful improvements to human and social service programs intended to promote economic mobility and well-being for families in poverty.

APPENDIX

Methods used to develop the learning agenda on training and technical assistance

Three main sources of information informed this learning agenda: (1) feedback from a variety of stakeholders on gaps in knowledge about training and technical assistance (TA) and how the field might learn more; (2) a literature review on needs assessments used in training and TA; and (3) interviews with training and TA providers and recipients. The feedback from stakeholders primarily determined the topics and research questions for this learning agenda, and the findings from the literature review and interviews provided information about and support for possible research designs. (The methods for conducting the literature review and interviews are detailed in [“How to Assess and Address Technical Assistance Needs: Insights from the Literature and Practice.”](#))

To gather the feedback from training and TA stakeholders, the U.S. Department of Health and Human Services’ (HHS) Office of the Assistant Secretary for Planning and Evaluation (ASPE) and Mathematica:

- Held a convening with 36 technical experts (training and TA funders, developers, providers, recipients, and researchers)

- Surveyed members of an internal HHS training and TA group regarding what topics they would like to know more about (and what topics they feel are already well researched)

ASPE, technical experts, and surveyed group members identified the topics in this learning agenda as ones the field needs to know more about.

ASPE and Mathematica then identified possible research questions and designs to answer those questions for each of these five topics. The research questions and designs were informed by the literature review, interviews, and a limited review of additional literature on training and TA effectiveness and valuable practices, considerations of equitable access and benefits in human and social services programs, and research methodologies.

Works consulted

Abazeed, Ali, and Amanda Benton. “Improving Human Services Using Virtual Technical Assistance.” Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, April 2020.

Altschuld, James W., and David Devraj Kumar. *Needs Assessment: An Overview*. Volume 1. Thousand Oaks, CA: Sage, 2010.

Anderson, Mary Anne, Jesse Chandler, Annalisa Mastro, Amanda Benton, and Gretchen Lehman. “How to Assess and Address Technical Assistance Needs: Insights from the Literature and Practice.” Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, February 2021.

Baumgartner, Scott, Adam Cohen, and Alicia Meckstroth. “Providing TA to Local Programs and Communities: Lessons from a Scan of Initiatives Offering TA to Human Services Programs.” Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, January 2018.

Cane, J., D. O’Connor, and S. Michie. “Validation of the Theoretical Domains Framework for Use in Behaviour Change and Implementation Research.” *Implementation Science*, vol. 7, no. 1, 2012, p. 37.

Centers for Disease Control and Prevention. “Types of Evaluation.” Atlanta, GA: CDC, n.d. Available at [cdc.gov/std/Program/pupestd/Types%20of%20Evaluation.pdf](https://www.cdc.gov/std/Program/pupestd/Types%20of%20Evaluation.pdf).

Conroy, Kara, Mary Anne Anderson, Annalisa Mastri, Amanda Benton, and Gretchen Lehman. "Facilitating Local Cross-Sector Collaboration: Strategies for Intermediaries." Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, February 2021.

Dunst, C., K. Annas, H. Wilkie, and D. Hamby. "Scoping Review of the Core Elements of Technical Assistance Models and Frameworks." *World Journal of Education*, vol. 9, no. 2, 2019, pp. 109–122.

Durlak, J., and E. DuPre. "Implementation Matters: A Review of Research on the Influence of Implementation on Program Outcomes and the Factors Affecting Implementation." *American Journal of Community Psychology*, vol. 41, nos. 3–4, 2008, p. 327.

Goesling, Brian and Joanne Lee. "Improving the Rigor of Quasi-Experimental Impact Evaluations." Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, May 2015.

Katz, Jason. "What Do We Know About Technical Assistance? Enhancing the Science and Practice of Technical Assistance via a Research Synthesis." Doctoral dissertation. Columbia, SC: University of South Carolina, 2015.

Katz, J., and A. Wandersman. "Technical Assistance to Enhance Prevention Capacity: A Research Synthesis of the Evidence Base." *Prevention Science*, vol. 17, no. 4, 2016, pp. 417–428.

Lyons, J., S. Hoag, C. Orfield, and S. Streeter. "Designing Technical-Assistance Programs: Considerations for Funders and Lessons Learned." *The Foundation Review*, vol. 8, no. 5. 2016, pp. 68–78.

Martin, Carlos, and Jamal Lewis. "The State of Equity Measurement: A Review for Energy-Efficiency Programs." Washington, DC: The Urban Institute, September 2019.

Michie, Susan, Lou Atkins, and Robert West. "The Behaviour Change Wheel: A Guide to Designing Interventions." London: Silverback Publishing, 2014.

Rossett, Allison. *Training Needs Assessment*. Englewood Cliffs, NJ: Educational Technology Publications, 1987.

U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation. "Measuring T/TA Effectiveness." Washington, DC: ASPE, n.d. Available at <https://aspe.hhs.gov/measuring-tta-effectiveness>. Accessed October 23, 2020.

West, G., S. Clapp, E. Averill, and W. Cates Jr. "Defining and Assessing Evidence for the Effectiveness of Technical Assistance in Furthering Global Health." *Global Public Health*, vol. 7, no. 9, 2012, pp. 915–930.

Endnotes

All authors and studies cited here are shown in full in the works consulted list.

ⁱ Lyons et al. 2016.

ⁱⁱ Dunst et al. 2019.

ⁱⁱⁱ Lyons et al. 2016.

^{iv} Katz 2015, Katz and Wandersman 2016.

^v Katz and Wandersman 2016.

^{vi} Martin and Lewis 2019.

^{vii} For examples, see Altschuld and Kumar 2010 and Rosett 1987.

^{viii} For examples of and more information about these tools, see Anderson et al. 2020.

Follow us on    

Princeton, NJ / Ann Arbor, MI / Cambridge, MA / Chicago, IL / Oakland, CA / Seattle, WA / Tucson, AZ / Washington, DC / Woodlawn, MD

EDI: High Wycombe, UK / Bukoba, Tanzania / Dar es Salaam, Tanzania