The Technical Assistance Approach to Inservice

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The technical assistance approach offers a systematic framework for planning, conducting, and evaluating inservice training.

An effective and efficient inservice program requires an overall framework to guide its implementation. Over the past eight years one such framework has been developed and refined by our system which provides program support and inservice training for innovative preschool projects for children with special needs. Our inservice model, derived from the Technical Assistance Development System, has proven useful both in achieving specific objectives, such as helping a staff member acquire new skills or prepare for a new role, and as a closed-loop program that can be recycled indefinitely for improving general competence on a continuing basis (Howey and Joyce, 1977).

The five-step technical assistance process takes the agent and client—those providing and receiving the aid, respectively—from the initial analysis of the problem through the various stages of delivering activities to a final evaluation of the methods and results. For our purposes the client is anyone needing assistance: a teacher; aide; counselor; support staff member; or group of staff members. The program

agent may be a superintendent or an assistant superintendent, a principal or an assistant principal, a supervisor, a librarian-media specialist, or a combination of these.

The TA Inservice Process

• *Step 1: Examining objectives*—It is vital for the agent to become thoroughly familiar with the overall goals, methods, and time schedule of the client at the outset of the project. Suppose, for example, the client is a group of team teachers and paraprofessionals involved in programming for an open classroom of 5- to 8-year-olds. In this case some of the important factors the agent must know are the program's expected developmental and academic results, the curricular and instructional methods being used, and the working details of how the staff acts as a team. It is helpful, too, to understand how the team has translated its general view of the problem into the elements of an operational plan—objectives, implementation procedures, alternative strategies, resources and constraints, and evaluation practices.

• *Step 2: Assessing the client's needs*—A client may want technical assistance to achieve certain objectives, which may or may not be specified in an inservice plan. This presumably occurs when a staff member's knowledge, expertise, and/or resources are inadequate to the task at hand. The client and agent, therefore, come together for two purposes. The first is to examine and clarify cooperatively and systematically the client's operating plan in order to find the reasons for the discrepancy between where the program is and where the client would like it to be. The second is to further identify and/or clarify the kind of technical assistance the client needs.

In its work with preschool demonstration projects for exceptional children, the Technical Assistance Development System uses a detailed questionnaire, answered through discussion, to help pinpoint what those needs are. The questionnaire covers a project's major categories: administration and management; services for children and for parents; staff development; demonstration and dissemination; and continuation funding.

Using the example of the open classroom team setting described earlier, the needs assessment could be based on an outline of the goals, objectives, and component parts of the total instructional program. The outline could be used by the agent and clients to identify needs, or, if specific needs have already been identified, it could serve as a point of reference for the agent in determining where, within the overall instructional program, the needs fit. Once the needs are identified, the client and agent coopera-

tively judge the relative importance of each and rank them in priority order.

• *Step 3: Preparing an agent-client agreement*— After needs are assessed, a written agreement is then prepared between the agent and client. This document outlines the focus of the assistance, the resources to be used, delivery practices and schedules, the intended results, and the evaluation procedure. In short, the agreement makes plain in clear, straightforward language exactly what is to be done for and by the client. It also serves as an accounting tool and aids in managing resources. (See Figure 1.)

• *Step 4: Coordinating and delivering assistance* —Once an agreement is reached and specific procedural steps established, it is the agent's responsibility to systematically find, retrieve, and deliver the necessary resources. These may come from the agent's own immediate resources or the agent may turn to outside help. Most often the client is served simply though personal, onsite consultation. Other services that may be provided are group topical workshops, review and critique of media and materials, funds for purchasing materials, information searches, and arranging for the client to observe other programs. Print and nonprint materials such as newsletters, audiovisual aids, handbooks, and monographs may also be supplied.

• *Step 5: Evaluating the technical assistance*— There are two ways of evaluating the type and delivery of assistance, either while the program is under way or in summation after its conclusion. In the first case, the client informs the agent orally and/or in writing immediately following the delivery of each assistance activity how effective, useful, timely, and satisfying it was. In the alternate approach, the client evaluates each activity following the completion of a whole cycle. After the evaluation the client may ask for another needs assessment and so begin the cycle again. (See Figure 2.)
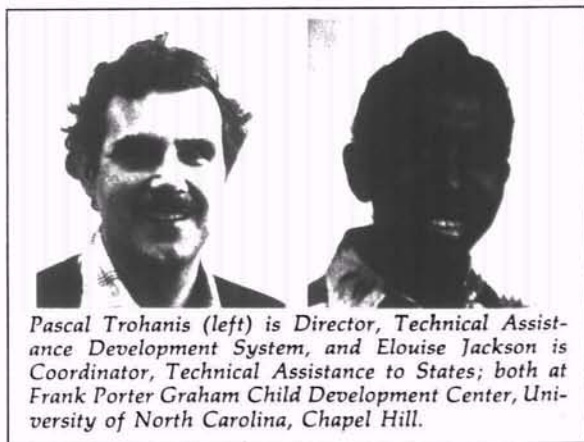
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Some Underlying Principles

While we feel this process offers a workable alternative to more traditional inservice approaches, the framework requires a number of support factors to be effective. Our experience as well as a growing base of literature indicate there are seven underlying principles that both agent and client must accept and implement systematically (Gallagher, 1973; Havelock, 1973; Reynolds, 1975; Trohanis, 1975; Lillie and Black, 1976). These are:

• Mutual planning throughout the technical assistance process;

• Commitment to the process as a two-way street demanding the time and effort of both parties;

• Continuous, responsive, and coordinated communication between agent and client over time;

• A trusting relationship to enhance assistance delivery;

• Deployment of qualitative, solid instructional ideas and practices through a mix of the best resources available—consultants, materials, and the like;

• A focus on integrating experiences for the client that blend research, knowledge, skill, and decision making;

• Allowing opportunities both for remedying client weaknesses and for enhancing existing skills.

Implementing the Technical Assistance Approach

As with any new practice, it is necessary before starting to address a series of considerations that relate directly to its application.

1. Determine who in the school will be responsible for serving as the agent. Will it be the principal, assistant principal, librarian, counselor, or someone else?

2. Determine who is to receive the assistance and within what parameters. Will it serve teachers, counselors, janitors, kitchen staff, secretaries, and/or speech therapists? Will it be used to improve general skills, lead to new credentials, or both?

3. Determine the amount of time to be spent on inservice and the calendar for it. How many hours of participation will be available and with what frequency?

4. Determine the amount of assistance to be provided each staff member. Will novice teachers receive more help than experienced ones? Will those engaging in new techniques or programs be allowed more aid?

5. Develop guidelines for the logistics of implementing activities. Will there have to be arrangements for getting participation approval, release time, teacher substitutes, travel reimbursement?

6. Prepare a resource analysis. What funds are available? Are inhouse expertise and materials available? What outside resources such as local demonstration sites and consultants might be used?
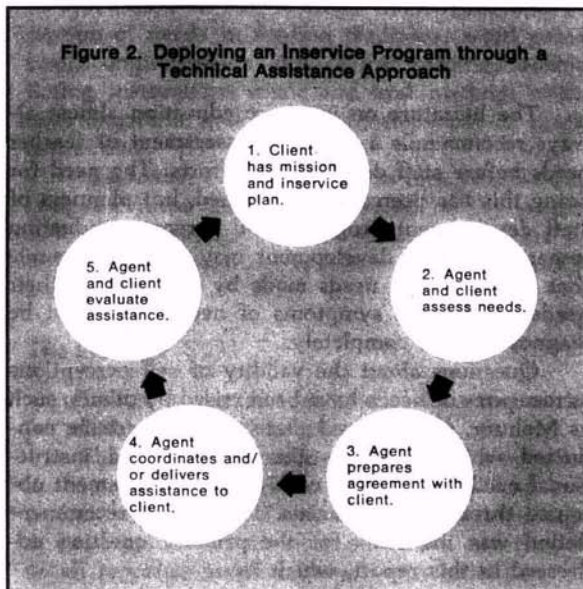
7. Develop and maintain liaison with local resources. What university, college, community college, and/or private practitioners should be contacted? How often?

8. Complete the needs assessment, delivery, and evaluation strategies. How will needs be identified? Individually or by groups of personnel? What meth-

Figure 1. Example of a Technical Assistance Agreement

Client: Open Classroom Team Teachers   Date: 8/15/79

Need: Assistance in modifying the science learning center in an open classroom setting serving children 5 to 8 years of age.

Target: Open classroom team teachers

Technical Assistance Focus: ✓ Knowledge/Awareness   Product Development
                                  Skill Development   ✓ Decision/Change

Technical Assistance Objectives	Technical Assistance Activities	Technical Assistance Documentation
1.0 By October 15, 1979, the open classroom team will have modified their science learning center for more functional use by children 5 to 8 years of age.	1.1 By August 31, the TA agent will have identified 3 district/regional programs with science learning centers that can be used as models for the open classroom. 1.2 By September 7, the TA agent will facilitate contact between the team teachers and persons at the district/regional sites for the exchange of information related to specifics of the inservice needs, outcomes of the inservice assistance, and ways that the site resource persons can assist with the transference of ideas. 1.3 By September 14, TA agent and team teaching group will work out the logistics of facilitating the different site visits including substitute teachers if necessary, transportation, time off if not an inservice day, and scheduling. 1.4 By September 28, the team teachers will make appropriate onsite visits, each at a different site, to talk with and exchange information regarding modifications of the science center. 1.5 By October 15, the TA agent will contact the team teaching group for feedback regarding their inservice site visits. If further assistance is needed to help them modify the science center, the TA agent will arrange for consultation with a district or regional consultant. If no further consultation is necessary, the team teaching group will meet to exchange information/ideas gathered from their inservice visits, consolidate ideas, and develop modifications for the science learning center.	1.0 By October 15, 1979, the team teaching group will provide written evaluative feedback to the TA agent concerning the TA assistance.

Figure 2. Deploying an Inservice Program through a Technical Assistance Approach

1. Client has mission and inservice plan.

2. Agent and client assess needs.

3. Agent prepares agreement with client.

4. Agent coordinates and/or delivers assistance to client.

5. Agent and client evaluate assistance.

ods of delivery are most appropriate for the particular situation? Should there be written evaluation?

9. Determine strategies for sharing accountability data with the "front office," the superintendent and main office personnel, the school board, parents, the PTA, and other relevant audiences. Will an an-nual report be prepared and to whom will it be distributed?

The technical assistance approach demands that a school's inservice training program have a clearly defined philosophy and well-developed procedures consistent with that philosophy. To make the program work effectively, agents must make sure other priorities do not interfere with it. Finally, all parties need to foster a collaborative spirit in order to make the program a success. E_L

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