Insert State

Training and Technical Assistance Plan

Program Period Date

State

T/TA Plan

Program Period 1

**Overview and Purpose**

The purpose of the State T/TA Plan Template is to provide a tool that can assist in the development of a comprehensive summary of the collective T/TA resources and activities in a particular state that include:

* T/TA needs of local Community Action Agencies in the state;
* T/TA resources available from key partners: the State CSBG Lead Agency, State Association, and Regional Performance and Innovation Consortium (RPIC); and
* T/TA strategies to be implemented in the upcoming year and the associated outcomes.

This template is provided as part of the Organizational Standards Center of Excellence (OSCOE) to assist in one of its key tasks: *Facilitating the Development of State-Specific T/TA Plans to Assess Organizational Capacity and Performance.* All State CSBG Lead Agencies report their T/TA activities in their CSBG State Plans. State Associations also report on their T/TA activities, but often use different reporting formats for different funding sources (e.g. State CSBG Lead Agencies, RPICs). The purpose of the State T/TA Plan Template is to collect this important information into a single document to:

* Support communication and collaboration at the state level on the planning and use of T/TA resources;
* Enhance the capacity for regional collaboration on T/TA by providing a uniform method for states to share information;
* Strengthen the ability of the CSBG Network’s national partners to provide targeted T/ TA on high-priority issues at the national, regional, and state levels; and
* Provide a comprehensive picture of the CSBG Network’s T/TA investments and activities.

Most of the information requested in this template should be available in other reporting documents. Information on State CSBG Lead Agency T/TA investments and activities can be found in the CSBG State Plan. Similar State Association information can be found in sub- contract work plans or similar documents submitted to RPICs, State CSBG Lead Agencies, and other funders who support T/TA activities. It is recommended that states use this template as a way to collect information on T/TA needs, resources, and activities into a single document.

**Instructions**

A State T/TA Plan should be developed by the State Association in collaboration with the State CSBG Lead Agency and RPIC lead as appropriate. If the state does not have a State Association, the State CSBG Lead Agency should work with its network of local CAAs and the RPIC to complete the template. It is intended that the State T/TA Plan be completed and submitted to the RPIC lead and the Organizational Standards Center of Excellence (currently the Partnership) by October 19th 2018 to coincide with the completion of State CSBG Lead Agency State Plans. The State T/TA Plan is not intended to be a binding document because T/TA activities often change over the course of the year and the State CSBG Lead Agency and State Association may revise the State T/TA Plan as necessary during the year if they so choose.

The RPIC will use the State T/TA Plans to support regional collaboration that improves the effectiveness and efficiency of T/TA resources.

The OSCOE will aggregate the data from all State T/TA Plans in cooperation with its national partners, who include the Office of Community Services (OCS), the National Association for State Community Services Programs (NASCSP), CAPLAW, and the Association for Nationally Certified ROMA Trainers (ANCRT). The national partners will use the data to develop a comprehensive picture of the CSBG Network’s overall investment in T/TA, prioritize the development of T/TA resources, and support T/TA efforts at the national, regional, and state level. Additional guidance on completing the template is included in each section below.

Respondents can attach additional documentation of T/TA activities as available and necessary. Examples of such documents could include:

* Sections of the State CSBG Lead Agency’s State Plan related to T/TA;
* State Association work plans related to T/TA;
* Summary results of T/TA needs assessments;
* Planning documents describing T/TA strategies and activities; and
* Evaluation plans for T/TA
1. **Training and Technical Assistance Needs**

This section summarizes (1) the T/TA needs assessment process conducted by the State Association and State CSBG Lead Agency and (2) the main T/TA needs addressed by the plan.

## T/TA Needs Assessment Process

Briefly describe in one or two paragraphs the process used by the State CSBG Lead Agency and State Association to assess the T/TA needs of the state’s CSBG Network. Include any promising practices used to assess T/TA needs or lessons learned that would benefit other states. Attach any documents summarizing the results of T/TA needs assessment that will provide additional detail about the state’s T/TA needs.

## Needs Assessment Process

## High Priority T/TA Needs

Use the section below to list the ten highest priority T/TA needs as identified by the State CSBG Lead Agency and State Association. Use the Additional Comments section to add any narrative necessary to explain the state’s T/TA needs.

List the top ten T/TA needs identified in your state with a brief description of each need.

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State

T/TA Plan

Program Period 5

## Additional Comments

1. **Training and Technical Assistance Plan**

The section describes the primary activities that comprise the state’s T/TA Plan. It should be completed by the State Association in collaboration with the State CSBG Lead Agency and RPIC as necessary. This section is divided into two parts. Section IIA lists the broader T/TA Strategies and Outcomes for both the State CSBG Lead Agency and the State Association. Section IIB lists specific T/TA Activities to be conducted, and the specific Providers, and Delivery Methods for those T/TA Activities.

Section II A

The T/TA Strategies column should include a brief narrative description (3-5 sentences) of the T/TA strategies that will be used by the State CSBG Lead Agency and State Association.

Examples might include:

* + Plan a state conference for local CAAs. Tracks will include ROMA, Organizational Standards, finance, human resources, advocacy, and innovative programs. Trainers will include State Association and State CSBG Lead Agency staff and local and national consultants.
	+ Fund a cohort of ten ROMA implementers. Develop a ROMA Implementers network to support ongoing professional development and peer learning opportunities.
	+ Provide a series of six in-person workshops for CAAs on board development issues. Trainings will be provided by State CSBG Lead Agency staff on topics based on agency feedback over the course of the year.

The Lead column should note whether the State CSBG Lead Agency, State Office, or another provider is the lead on each T/TA strategy.

The T/TA Outcomes column should include a brief narrative description (3-5 sentences) of the primary outcomes that each T/TA Strategy aims to achieve. The use of Results Oriented Management Accountability (ROMA) principles is also strongly encouraged and would include outcomes that are:

* + Specific
	+ Measurable
	+ Attainable
	+ Results-oriented; and
	+ Time trackable.

**State Training and Technical Assistance Plan**

**Section II A Strategies and Outcomes**

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| **Strategies** | **Lead** | **Outcomes** |
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**State Training and Technical Assistance Plan**

**Section II A Strategies and Outcomes**

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| --- | --- | --- |
| **Strategies** | **Lead** | **Outcomes** |
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**II. Training and Technical Assistance Plan (Continued)**

Section IIB Survey Monkey Instruction

Please use the link below to access the Survey Monkey portion of the T/TA Plan. When both State CSBG Lead Agencies and State Associations have given input, **each state should complete only one online survey.** A PDF that includes all questions is provided to help plan responses before entering them in the survey.

[Section IIB Survey (Online Form)](https://www.surveymonkey.com/r/2019TTA2B)

[Section IIB Survey (PDF)](http://cap.iescentral.com/filelibrary/State%20TTA%20Template_Section%20II%20B.pdf)

[List of T/TA Topics By Category](http://cap.iescentral.com/filelibrary/List%20of%20T.pdf)

*Instructions for Questions Three through Six on Financial Resources (moved to Survey Monkey for the FY 2019 State T/TA Plan)*

Questions three through six address the financial and other resources available to support T/TA in the state from the State CSBG Lead Agency, State Association, and RPIC. The choices selected are understood to be budgeted amounts may change over the course of the year.

For total funding, choose the appropriate response to indicate the total dollar amount available to spend on T/TA (including salaries for staff that provide direct T/TA) for the current fiscal year from all grants and cooperative agreements (federal, state, and philanthropic) and other revenue sources (e.g. State Association member dues dedicated to T/TA). Include all direct and indirect costs as long as they directly support T/TA activities. Do not “double count” sub-contract revenues (e.g. a State Association should not count a sub-contract from a State CSBG Lead Agency to provide T/TA since those dollars will already be included in the Lead Agency’s total).

Use the Other Resources and Notes box (question six) to provide details on other significant T/TA resources (e.g. in- kind support provided by a local university, training staff provided by other units of state government). If necessary, also provide any additional contextual information about funding for T/TA (e.g. percentage of the state’s CSBG allocation provided to the State CSBG Lead Agency, limits on State Association funding given the state’s CSBG allocation and/or number of agencies in the state, etc).

*Questions Seven through the End*

These questions are intended to provide additional details on the types of T/TA, providers, and delivery methods used in each state. There are 12 categories of T/TA included. Please note that if you respond that your state will provide no T/TA in a particular category, you will skip to the next category on the list. For each category of T/TA, “drop down” menus are provided to indicate the topic, provider, and delivery method. You may choose the same topic multiple times if you use different providers and/or delivery methods.

Please note that the responses are intended to capture information on significant T/TA activities and provide states a way to compare the topics, providers, and delivery methods they use to the rest of the Network. For example, it is not necessary to include a topic on which your state plans to provide a single webinar. However, if both the State CSBG Lead Agency and State Office both plan to provide significant T/TA on the same topic, you would choose the topic twice, list the appropriate provider, and indicate the primary delivery method used by each.

1. **Implementation Plan**

In two to three paragraphs, describe how the State CSBG Lead Agency, State Association, and RPIC will work together to implement the State T/TA Plan. Include (1) communication and coordination processes (e.g. regular conference calls, reporting procedures) that will be used to manage implementation of the Plan, and (2) a brief summary of how the Plan’s outcomes will be evaluated. Attach any additional documents that provide further details on implementation and evaluation plans if available.

State

T/TA Plan

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