



IMPROVING HUMAN SERVICES USING VIRTUAL TA: SUMMARY OF RESEARCH FINDINGS

Technical assistance (TA) comes in many forms, including in-person and virtual. It aims to help programs build their knowledge and capacity and enhances partnerships and services. When in-person TA is not feasible, virtual TA may provide a helpful tool to improve collaboration for human services programs at the local level.

Virtual TA is a form of planned and ongoing TA delivered remotely with built-in opportunities for interaction and an arc of learning framework that advances informal knowledge to more sophisticated reasoning over time. This fact sheet summarizes findings from key informant interviews led by the HHS Office of the Assistant Secretary for Planning and Evaluation (ASPE) with federal staff and TA providers about virtual TA.

Emerging Practices in Designing and Delivering Virtual TA

Respondents noted that elements important to successful in-person TA (e.g. is designed with recipients' unique needs in mind, fosters consistent interaction, has clear objectives, is responsive to evolving needs) are also important for virtual TA. Promising approaches to virtual TA include being technologically accessible; fostering peer-to-peer collaboration where appropriate; being flexible and nimble as recipient needs and wants change; and featuring interaction as a main objective. Here are some key points to consider:

- **Choose technology tailored to the audience's access and expertise.** Prioritize usability and accessibility to the participants over sophistication. It may be tempting to choose a more innovative solution, but virtual TA is most successful when it uses technology that works for and can be accessed by all participants.
- **Administer virtual TA regularly.** Recipients seem to find virtual TA experiences more positive when it is delivered regularly, such as on a monthly basis. Consistent virtual TA can help establish strong relationships and momentum. Customize the exact frequency and approach based on recipient needs.
- **Supplement virtual TA with in-person meetings.** While this may not always be possible, occasional gathering in person can be beneficial for recipients. At these events, participants can network with other recipients and subject matter experts or participate in site visits, which may help reinforce the knowledge they gain remotely.
- **Design virtual programming with recipients in mind.** Just like with in-person TA, it is important to remember the audience. Engage recipients prior to rolling out programming and create space for off-script questions and discussion. That can help recipients feel more valued, engaged, and accountable since they had input in content and delivery.
- **Facilitate a virtual platform for peer sharing.** Recipients seem to welcome peer-led offerings and may sometimes feel more comfortable engaging with peers online than with federal staff or external TA providers. These peer-to-peer offerings can in some cases lead to greater interaction and a heightened sense of learning among recipients.
- **Offer opportunities for interaction and follow-up.** Respondents noted that virtual TA may often work best when it is not a one-way communication channel but allows recipients the chance to follow up in a way that works for them (e.g. by phone, email virtual office hours, or chats).

Examples of virtual TA include:

- Virtual peer learning communities
- Breakout sessions
- Webinars
- Online presentations
- One-on-one coaching

Virtual TA can be an effective tool for federal agencies to use when in-person TA offerings are not feasible for budgetary, health, or other reasons. For more information about virtual TA, read the full project findings from "Improving Human Services Using Virtual Technical Assistance," or contact Amanda Benton at Amanda.Benton@hhs.gov.