

Office of the Assistant Secretary for Planning and Evaluation  
U.S. Department of Health and Human Services

OFFICE OF HUMAN SERVICES POLICY

# Improving Human Services Using Virtual Technical Assistance: Research Brief

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## KEY FINDINGS

- We define virtual technical assistance (TA) as planned and ongoing TA delivered remotely that offers built-in opportunities for interaction and an arc of learning focused on advancing informal knowledge to more sophisticated reasoning over time. Department of Health and Human Services program staff report that elements of successful in-person TA are also important for virtual TA.
- Respondents emphasized the importance of choosing the virtual TA technology that works for all participants, not necessarily the most innovative tool. Virtual TA seems to work best when it responds to the unique needs of recipients and prioritizes usability and interaction over sophistication.
- Regular administration of virtual TA programming may increase recipient satisfaction. The more consistently program offices offer virtual TA, the more likely TA recipients are to speak positively about their experiences.
- Other emerging practices in the design and delivery of virtual TA include supplementing virtual TA with in-person TA, designing virtual TA programming vehicles with recipients in mind, facilitating virtual platforms for peer sharing, and offering recipients opportunities for interaction and follow-up.

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## BACKGROUND

Technical assistance (TA) is an important tool to support the federal government's significant, continued investment in local communities working to improve well-being and economic resilience and mobility. Although the definition of TA varies, a common feature is the transfer of knowledge, expertise, and skills to individuals, organizations, and communities to identify service gaps and needs, to plan for change, and to develop innovative solutions to address long-standing and emerging challenges (Lyons et al. 2016).

Virtual TA may be a helpful tool to improve collaboration among human services programs at the local level. To better understand virtual TA, we conducted key informant conversations with federal staff and TA providers to identify promising strategies and lessons learned. This brief

aims to begin to develop a knowledge base on the types, use, and effectiveness of virtual TA as a potential tool available to improve economic mobility and overall child and family well-being.

## FINDINGS

### Virtual TA Varies Across Programs

**What Is Virtual TA?** Respondents described a wide variety of examples of virtual TA, ranging from virtual peer learning communities to virtual one-on-one coaching and from virtual conferences, complete with breakout sessions, to hybrid approaches that combine in-person and virtual activities. While many stakeholders define virtual TA broadly to include any TA not delivered in person (e.g., ranging from web-based guides or directed webinars with minimal interaction to ongoing peer-led calls), for our purposes we defined it more narrowly:

*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 focuses on advancing informal knowledge to more sophisticated reasoning over time.*

Our respondents supported the definition, but most acknowledged that it is aspirational and often ahead of current offerings, primarily webinars and online presentations. Several respondents noted that presentation-based webinars without a chance to address recipients' specific questions and needs may not always be the best method for achieving stakeholder buy-in and nuanced understanding and that opportunities for interaction are crucial to the success of virtual TA. External TA providers noted that the "planned and ongoing" nature of their virtual TA delivery is crucial to its success, highlighting the importance of that part of the definition.

To show how this approach plays out in practice, several examples in boxes throughout this brief show how one federal office, the Office of Head Start, provides some of its virtual TA.

**How Do Programs Decide to Structure Their Virtual TA?** Through our conversations, we found that virtual TA is perceived and structured differently based on program priorities, available resources, existing partnerships, and the work stream of individual offices. Informants emphasized the variability within their own programs and noted the importance of trial-and-error approaches. Decisions on how to structure virtual TA are often driven by policy priorities and logistical constraints, including the availability of funding, staff expertise, technological availability, and the location and demographics of recipients.

### Emerging Practices in Designing and Delivering Virtual TA

**Elements of Successful In-Person TA Are Also Important for Virtual TA.** Respondents agreed that best practices for general TA also apply to virtual TA. Consistent with some of the findings of a related analysis, [Providing TA to Local Programs and Communities: Lessons from a Scan of Initiatives Offering TA to Human Services Programs](#), respondents indicated that successful virtual TA—like in-person TA—works well when it is:

- Accessible and designed with the recipient in mind;
- Developed to foster consistent interaction among providers, between providers and recipients, and among recipients;
- Customized to the unique needs of recipients participating in the program;
- Designed with clear objectives; and
- Responsive to recipients' evolving interests.

#### Methods

In addition to conducting a short, targeted literature review, we identified promising strategies and lessons learned from key informant conversations with two external contracted TA providers and with federal staff at the Department of Health and Human Services who directly provide or manage virtual TA for these agencies and offices:

- Children's Bureau
- Office of Child Support Enforcement
- Office of Refugee Resettlement
- Office of Head Start
- Office of Regional Operations
- Office of Family Assistance
- Center for Substance Abuse Treatment

We also spoke with federal staff who manage virtual TA contracts at the Department of Education and the Department of Housing and Urban Development.

Though the elements that make in-person and virtual TA successful have significant overlap, more targeted research is needed to better understand the unique aspects of successful virtual TA. We found, however, that successful virtual TA may particularly rely on a gradual approach that fosters recipient feedback, trial testing, and flexibility to adjust or overhaul the offerings as needed. Respondents identified several approaches to planning and delivering virtual TA that hold promise. These approaches are described below.

**Choose Technology Tailored to the Audience’s Access and Expertise.** The success of virtual TA is linked to the technology used. Increasingly sophisticated tools, such as video conferencing that may allow users to see each other’s faces and more quickly develop connections, may be tempting. However, successful virtual TA requires a platform and a style that work for *all* TA recipients, regardless of their level of technological expertise or access. For example, several respondents noted that rural and tribal stakeholders may have limited internet connections, and senior state administrators participating in one program’s virtual conference have had difficulty finding their desired breakout room. Technological glitches can derail a TA session with questions and delays, distracting even those who successfully navigate the technology. Simpler technologies that achieve the goals may often be more efficient and effective. For example, one program now uses PowerPoint slides and phone calls instead of webinars for tribal programs in rural areas. The goal is to share information, not to be flashy.

However, understanding an initiative’s specific audience is critical. For example, one program found that a rural Alaskan tribal cohort consisted of particularly effective users of technology, given their preexisting relationships and history working remotely due to their geographic isolation. Providers, recipients, and other partners can jointly choose a platform that caters to recipients’ unique needs and experiences.

**Administer Virtual TA Regularly.** Informants suggested that the regularity of virtual TA may be connected to recipient satisfaction. We found that the more consistently program offices offered virtual TA (e.g., once a month for 12 months vs. less frequently), the more likely recipients were to speak positively about the virtual TA. Several respondents noted that when they began their virtual programming, they tested different frequencies and timelines and adapted in response to feedback from their recipients. In our conversations, we found that most offices offered regular, group virtual TA opportunities for at least an hour a month over at least 9 to 12 months. In many cases, this regularity may help establish strong relationships and momentum. For example, one provider working in the early care and education

#### Learning Cohorts: Office of Head Start Virtual TA Example 1

**Goal:** In response to feedback that grantees want to know what others in the early care and education space are doing, some of the eight national TA centers have focused on specific topics and regional federal staff provide grantees with 9-month learning opportunities using a curriculum established in consultation with regional office staff and regional TA providers.

**Description:** Cohorts join 60- to 90-minute sessions each month for 9 months (coinciding with academic calendars) on an Adobe Connect platform with built-in opportunities for interaction, a repository for resources, and a real-time feedback survey at the end of the sessions. The national TA center leads a call with federal regional staff who consult with grantees, conduct needs assessments, determine topics, and organize grantees into cohorts. Grantees drive the discussion with technical and substantive support from regional staff. Topics are usually within a specified area, and TA staff are flexible and allow conversations and feedback to drive next steps. Sessions include a mix of presentations from TA provider experts and discussion among peer cohort members.

**Results/Impact:** Because cohorts are organized around complementary work streams, grantees are able to collaborate on projects that strengthen each other’s efforts. Their active collaboration helps establish community engagement that is sustained over the 9 months (and sometimes beyond).

**Lessons Learned:** Doing the work on the front end to conduct a needs assessment and then determine the most useful selection of cohorts and topics has led to positive feedback in grantee satisfaction surveys. Empowering federal regional offices and regional TA communities early in the process is an important part of developing a stimulating learning environment. Federal staff note that they have high levels of involvement when the national TA centers engage the grantees on topics and try to include varying levels of expertise on each topic within cohort communities.

community offers virtual learning opportunities monthly during the 9- or 10-month academic calendar to better tailor support services to grantees during the school year. Though this frequency seems to work well for group TA for most respondents' program offices, providers noted the importance of customizing their offerings to meet the recipients' unique needs. For individual, one-on-one virtual TA, some offices wait until recipients request it and then customize the intensity (length and frequency) of the TA as needed.

**Supplement Virtual TA with In-Person Meetings.** All respondents underscored the importance of in-person offerings to supplement successful virtual TA whenever possible. Using the term “ideally,” respondents agreed that getting together at least once a year is helpful. Most respondents agreed that an in-person meeting *before* the provision of virtual TA allows recipients to develop strong relationships and establish trust before they interact virtually. Several respondents reflected that the initial session of group (including peer-to-peer) TA would ideally be an in-person offering to establish shared language, goals, and a vision for the remote delivery.

For example, reflecting on the importance of in-person offerings, one of the external providers we spoke with noted that the convening is the “glue” for their virtual TA. Acknowledging financial limitations, one provider shared that meetings were held across the country **with funds allocated by TA contracts to support community participation for in-person meetings**. This support was seen as crucial; people in these communities remarked that they would not otherwise have been able to attend. At these events, participants not only networked with each other and with subject-matter experts but also visited sites to see the host community's work in action. Respondents noted that participants routinely report that in-person meetings are among the most satisfying components of virtual TA. Though in-person offerings may pose financial or other challenges, the investment could markedly improve the success of virtual programming in at least some cases.

**Design Virtual Programming with Recipients in Mind.** Previous ASPE research highlighted the importance of designing TA to be accessible and oriented around clear goals. In virtual programming, designing with the recipient in mind takes on a slightly different meaning. Rather than making assumptions about communities' capacities or capabilities, providers could engage recipients before designing platforms or programming. For example, an external provider respondent first conducts an informal needs assessment to identify what the technology and virtual TA should look like. The provider then asks recipients for their feedback, which is crucial to the ultimate success of the virtual TA. This approach is different from non-virtual TA development in that not only the content but also the platform of communication is determined with recipients' needs in mind. We found that when program offices and providers engaged recipients before rolling out virtual TA, recipients felt more valued, engaged, and accountable since they had a say in both the content and the vehicle of the programming.

Another external TA provider plans virtual TA sessions of 60 to 90 minutes but allows off-script discussion if recipients ask questions, provide ideas, or take the conversation in a new direction. The success of the programs highlighted in this section underscores the importance of being nimble and adapting in response to recipients' feedback.

#### Virtual as an Adjunct: Office of Head Start Virtual TA Example 2

**Goal:** After face-to-face interactions at conferences, meetings, or trainings, the Office of Head Start offers virtual support to build community, extend the learning process, and provide opportunities to meet virtually over a few months.

**Description:** National TA centers and regional networks often hold face-to-face interactions with grantees and then offer subsequent opportunities to extend the interaction virtually. Opportunities may consist of webinars, one-off calls, targeted TA, or the establishment of virtual cohorts.

**Results/Impact:** Providing virtual opportunities for interaction helped extend—and in some cases establish—working relationships between and among federal staff and members of the early care and education community.

**Lesson Learned:** Grantees report that face-to-face interactions help provide a solid foundation for relationships that can help propel their virtual community forward in a substantive way. Depending on the availability of resources, federal Head Start staff have found that providing opportunities for TA communities to convene in person before virtual engagement can be fruitful.

### **Facilitate a Virtual Platform for Peer Sharing.**

Relationships among TA providers, between providers and recipients, and among recipients play a key role in general TA provision. This fact holds true for virtual programming, but it is especially important to foster peer-to-peer relationships. For virtual TA, we found that peer-led offerings are usually perceived as more successful than directed TA. Respondents from several offices noted that peer-led interactions in their virtual programming have received overwhelmingly positive feedback from recipients. We found that peer-led platforms seem to be most successful when a known facilitator solicits online requests, creates a shared agenda, manages the calls, and follows up virtually with a recap and next steps.

Because the nature of virtual TA is more impersonal than in-person TA, **respondents shared that recipients are sometimes more comfortable when engaging online with peers than when collaborating with federal staff.** Respondents reported that compared with provider-led offerings, peer-to-peer interactions often resulted in deeper engagement and a heightened sense of learning among recipients. Respondents also shared the importance—as with in-person TA—of organizing peer groups to include recipients who are on the same level or who share similar experiences.

**Offer Opportunities for Interaction and Follow-Up.** Since in-person sessions are not always possible and virtual programming is inherently more impersonal, formal communication channels for recipients to contact providers or other recipients “off-line,” that is, outside of the formal virtual TA session, hold potential. However, more research is needed to figure out the best way forward. Consistent with findings on the need to foster relationships and adapt to recipients’ needs, respondents noted the importance of two-way communication in virtual TA. For example, several respondents shared that they offer some form of invitation for recipients to follow up—whether by phone, email, virtual “office hours,” or virtual chats—with questions, but those channels tend to be underutilized. Nonetheless, respondents shared that **recipients express a desire for more follow-up interactions and that more needs to be done to figure out how best to cater to recipients.**

## **CONCLUSION**

Continued study and improvement of the available tools will help federal agencies and programs continue to support local communities in improving economic mobility and child and family well-being. Investments in TA are particularly important for communities that rely on the transfer of expertise to improve collaboration among human services programs at the local level. Virtual TA is currently used and holds promise for the future because of its potential to expand the impact of TA, improve services, and reach far more participants.

### **MyPeers: Office of Head Start Virtual TA Example 3**

**Goal:** MyPeers is a virtual learning platform—a web-based resource repository offering social media and information exchange opportunities for participants—created by the Office of Head Start. On MyPeers, members of the early care and education community can brainstorm, exchange ideas, and share resources with early childhood colleagues from across the country.

**Description:** With more than 150 virtual MyPeers communities and work groups, members of the early childhood community use MyPeers to connect with peers, continue conversations begun in 9-month virtual cohorts, and learn from shared resources. Anyone can set up a community in MyPeers by filling out a simple form outlining their needs and goals. A small committee reviews all submissions, and after approval, users have free rein within a code of conduct.

**Results/Impact:** MyPeers has developed into a virtual TA convening spot for grantees who meet each other on national webinars, in regional TA virtual cohorts, and at in-person sessions to collaborate in an informal, virtual setting that advances knowledge.

**Lessons Learned:** MyPeers administrators note that providing a virtual community built by and for members of the early care and education community is essential because it provides an environment that is less intimidating than one operated by federal staff or contractors. Grantees interact with colleagues, not with national or regional federal staff. National TA centers provide relevant resource links if the community surfaces a need and add to the discussion thread as appropriate. Participants have shared that they feel more comfortable asking questions and exchanging information because of this structure.

A successful virtual TA initiative is technologically accessible, fosters peer-to-peer collaboration where appropriate, adapts in flexible and nimble ways as recipients' needs and preferences change, and features interaction as a main objective of the platform. However, more research is needed to better understand this nascent topic. This brief attempts to understand virtual TA as a tool available to the federal government and other funders of services and begins to introduce a common understanding of the term into the TA field.

## References

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