

Technical Assistance Plan

The following pages provide guidance for developing a technical assistance plan or request regarding planning and forecasting. Completion of the forms is optional. Please copy these pages or remove the perforated copies of the same documents found in Appendix D and use them as needed in your technical assistance process.

1. Identify the general area of planning and/or forecasting activity you want to pursue.

2. Will your activities involve primarily operational or strategic planning? What is the timeframe for your planning (e.g., have a new service operational in 6 months; conduct strategic planning for the next 5 years)?

3. What type of information do you need to engage in forecasting activities for the planning you are doing?

4. Who are the stakeholders to be included in the planning process? What role does each play, and why is he or she important to the process?

5. What activities have you undertaken or will you undertake to achieve consensus on the nature of the problem or need for change?

6. What information will you need for decisionmaking?

- A. Program population statistics and trends.

- B. General population statistics and trends.

- C. Research findings on particular problems, issues, or conditions.

- D. Program examples from other jurisdictions.

- E. Other.

How will you obtain this information?

7. What are your jurisdiction's or agency's:

A. Values?

B. Vision?

C. Mission?

D. Goals?

- 8. What are the program objectives for the problem, issue, or condition under consideration? Be sure objectives specify actions, conditions, and methods to measure them by. Objectives should be attainable.**

9. What strategies will you use to meet your objectives?

I 1. What resources are needed to implement your plan?

I 2. How will you obtain or create these resources?

13. How will you monitor and evaluate the implementation of the plan?

A. What data need to be gathered?

B. How will data be collected?

C. How will you manage storage and retrieval of the data?

D. How will the data be used (e.g., program improvement, public relations)?

I4. Describe the technical assistance you need for planning and forecasting.

In the following chart, check each area for which assistance is needed, and write a clear but brief description of the question or problem for which assistance is needed. Indicate whether you feel you need limited, moderate, or onsite/longer term assistance.

Limited technical assistance involves brief assistance to locate information—or a resource person who can supply information—related to specific questions.

Moderate technical assistance includes information needs and an ongoing exchange with knowledgeable resource persons through telephone conversations and correspondence.

Onsite and/or longer term technical assistance is needed for significant issues that require face-to-face contact with consultants.

✓ if TA needed in this area	List the problem, issue, or condition and describe why technical assistance is needed	✓ if limited TA is needed	✓ if moderate TA is needed	✓ if onsite or longer term TA is needed
	<ul style="list-style-type: none"> Stakeholders to be involved. 			
	<ul style="list-style-type: none"> Achieving consensus on the nature of the problem or need for change. 			
	<ul style="list-style-type: none"> Organizing information for decisionmaking. 			

✓ if TA needed in this area	List the problem, issue, or condition and describe why technical assistance is needed	✓ if limited TA is needed	✓ if moderate TA is needed	✓ if onsite or longer term TA is needed
	<ul style="list-style-type: none"> Developing or clarifying values, vision, mission, and goals. 			
	<ul style="list-style-type: none"> Designing program objectives. 			
	<ul style="list-style-type: none"> Identifying strategies. 			
	<ul style="list-style-type: none"> Making action plans. 			
	<ul style="list-style-type: none"> Locating or creating resources. 			
	<ul style="list-style-type: none"> Monitoring and evaluation. 			
	<ul style="list-style-type: none"> Other. 			