IS YOUR TRAINING AND TECHNICAL ASSISTANCE (T/TA) EFFECTIVE?
CONSIDERATIONS FOR MEASURING PERFORMANCE

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We all want our efforts to improve family well-being and economic opportunity to make a real difference. This is true for both human services programs and for the training and technical assistance (T/TA) provided to program staff. This toolkit outlines the benefits of measuring the effectiveness of T/TA, the important considerations in doing so, and how to create a performance measurement plan.

As you get started measuring the effectiveness of your T/TA, there are several key considerations to keep in mind.

- You can measure T/TA effectiveness in all five stages of T/TA delivery: content development, use, response, learning, and results.
- As you choose what to measure, collect only the information that will influence decisions about T/TA design and delivery. Balance usefulness, cost and ease, and participant burden.
- Create a plan for measuring T/TA performance by designing a logic model for your T/TA activities and goals, identifying what you most want to learn, choosing measures, and monitoring and using data to improve the effectiveness of your T/TA.

What do we mean by T/TA?

T/TA includes efforts that help programs or participants to identify and address challenges in delivering social services. T/TA involves transferring knowledge or building participants' skills, and it comes in different forms, including products and face-to-face interactions, such as toolkits and briefs, in-person meetings, and webinars. Plenty of other activities also fall under the scope of T/TA, such as affinity groups, conferences, and instructional videos. Variety in T/TA activities makes measuring performance a challenge, but no less important.

Why do you need to measure the effectiveness of your T/TA?

We all want to know whether investments in T/TA achieve their goals. Most important, measuring performance over time reveals what is working and what is not so that you can improve your T/TA going forward. Measuring T/TA's effectiveness also helps to monitor consistency in services provided across different T/TA providers and over time, holding the providers accountable for the quantity and quality of their work. Measuring T/TA performance also helps to justify not only increasing your investments when something is working but also redirecting resources when it is not. Ultimately, effective T/TA can help local, state, and private partners better serve families in the community.

How do you know *what* to measure?

You can collect information about the effectiveness of five stages of T/TA delivery: your development of content; recipients' use of, response to, and learning from T/TA; and end results. Ideally, you want to measure all five stages of any T/TA effort (Table 1) because they capture all aspects of your work, but this is often not realistic because of time and resource constraints. So, how do you choose which stage(s) to measure?

This is part of a project on "Measuring T/TA Effectiveness." Visit https://aspe.hhs.gov/measuring-tta-effectiveness for more resources.

Table 1. Five stages of T/TA

Content development	What are T/TA providers doing? Does the material provide the correct information?
Use	Do recipients use the T/TA that is offered?
Response	Are recipients satisfied with the T/TA?
Learning	What do T/TA recipients learn?
Results	Can T/TA recipients apply what they learn on the job? How does T/TA improve organizational results? Is T/TA cost-effective?

Start by prioritizing the most important things you want to know. Ask yourself and your team questions like: What do we care the most about? What information do we need to tell us whether our T/TA efforts are making a difference? How do we know that what we are doing has value? How do we know that things are getting better over time?

Then think about the information you need to answer those questions and the level of effort, the cost, and the burden on both T/TA recipients and the staff required to collect it. Once you outline these factors, you can start prioritizing your efforts to measure the performance of T/TA. Table 2 provides some additional considerations to think through as you decide what to measure.

Table 2. Making trade-offs: how to decide what to measure

Considerations	What should I consider?	What should I do?
Usefulness	Ask yourself what information is the most useful and how you expect to use it. You want to collect only the information that will meaningfully influence decisions.	• Identify how each piece of information that you are collecting informs decisions, including how it can help improve the product or activity next time. • Think about how you can collect data to touch on all five stages of T/TA and make trade-offs when necessary. • Think about benchmarks—what constitutes a good versus a bad score?
Cost, resources, and ease	Cost and resources play a major role in deciding what to measure. Think about the most important thing you want to know and how to balance cost against this need.	• Balance costs with what you need to know to tell you if your efforts are working. • Find economical sources of data when possible, such as online surveys or data that already exist for other purposes (attendance records, for example). • Discuss trade-offs with your priorities in mind. You may be able to learn most of what you want with a survey of 10 items instead of asking every question you have.
Participant burden	Carefully consider the effort required of participants to provide data. Collect just enough information to get what you need without overburdening participants.	• Identify the information that is most important for assessing how well your T/TA efforts are working. • Prioritize your data collection efforts such that they result in a reasonable level of effort from your recipients. • Explain why you are collecting data and how it benefits recipients.
Data collection burden on T/TA staff	Staff can also burn out from collecting and analyzing too much information, especially if it doesn't seem to influence their work.	• Constantly review what data are being collected, the burden it places on staff (and respondents), and how it is being used. Collect data that you know you will use.

How do you measure your T/TA performance?

Measuring T/TA in concrete terms can be a challenge for two reasons. It can sometimes be difficult to define precisely, and there are many forms of T/TA.

- Individual or group T/TA
- In-person or virtual T/TA
- Active (delivered directly to recipients) or passive (delivered through products for recipients) T/TA
- Peer-to-peer T/TA (TA provider creates opportunities for communities to exchange information) or directed T/TA (TA provider presents information)

Most T/TA initiatives include a combination of T/TA activities, and you should think about ways to measure various activities no matter the form. Keep in mind the five stages of T/TA delivery when deciding how to measure the performance of your T/TA activities. Also make sure to keep data confidential, meaning never share data with the names of the participants attached. Always protect participant data and make sure that it is stored and shared in a secure way.

Getting Data on Content Development and Use. In many cases, you may be able to rely either on information that the T/TA provider already has from existing reports or on administrative data to measure the content development (e.g., does the curriculum align with best practices?) and use (e.g., number of downloads or participants) stages. In practice, because you may already have these data, measuring these stages of T/TA delivery tends to be faster and less burdensome to recipients.

Getting Data on Response, Learning, and Results. Measuring the later stages of T/TA delivery can be useful when you want to know about outcomes. Often, however, you may need to solicit feedback directly from recipients in order to understand the response, learning, and results for any T/TA effort. However, new data collection (e.g., interviews, surveys, focus groups) also offers you the flexibility to get the most useful information. Table 3 describes strategies for collecting input from recipients on the later stages of delivering T/TA across all forms of it. Keep in mind how you will use the information that you gather, and set clear expectations for what you want to accomplish.

Table 3. How to get recipient feedback: measuring response, learning, and results for the types of T/TA

Type of T/TA	Ways to Solicit Feedback from Recipients
Individual or group	• In-depth feedback collected, for example, through open-ended questions is perhaps easiest when T/TA is provided individually. T/TA providers can directly ask the recipient initial and follow-up questions about how useful an activity was or what impact it had. • Surveys are useful when dealing with groups, allowing data to be collected in a systematic way. Surveys also provide consistency in what you learn because you collect data the same way across recipients.
In-person or virtual	• Feedback on in-person T/TA can be collected through recipient surveys and/or open-ended questions. • Getting recipients involved in data collection may require more effort in virtual T/TA, but online surveys or other electronic communication can ease data collection.
Active or passive	• Active T/TA is often what we think of when soliciting recipient feedback on T/TA effectiveness, such as providing a training directly to recipients. You can survey individuals who have participated in a T/TA interaction. • But you can also get feedback on passive T/TA, such as toolkits or briefs. Think about ways to engage recipients to whom you have delivered passive TA, such as surveying those who downloaded a toolkit or holding discussion groups with people who read a brief.
Peer-to-peer or directed	• Depending on what form of directed T/TA you use, surveys or separate, open-ended individual questions may be the most efficient way to solicit feedback. • Peer-to-peer T/TA is group T/TA by definition, so surveys of recipients may be the most straightforward way to collect information. However, it may make sense, particularly in smaller peer-to-peer groups, to solicit in-depth feedback individually from each recipient. Consider holding a focus group with some or all recipients to let them build on each other's feedback about T/TA effectiveness.

How do you get ***started*** measuring the effectiveness of your T/TA?

The best way to start measuring the effectiveness of your T/TA is to develop a plan. Figure 1 lays out the steps for doing so.

Figure 1. Steps for developing a T/TA performance measurement plan

1. **Create a logic model for your T/TA activities**
   Outline T/TA activities and goals
2. **Identify measurement areas**
   Identify what you most want to learn
3. **Select measures**
   Decide how to calculate measures and what data sources to use
4. **Monitor performance**
   Develop a strategy for monitoring performance, including when and how often

A performance measurement plan should start with a logic model that describes the T/TA activities, what you expect to achieve (outputs), and what success looks like (desired outcomes). These outputs and outcomes form the basis of what you will measure. Figure 4 shows an example of a logic model for a hypothetical T/TA effort designed to improve a healthy relationship program by incorporating adult learning principles into the interactions between case workers and clients.

Figure 2. Example of a logic model for T/TA in a healthy relationship program T/TA

Stages of T/TA being measured are shown in parentheses

Activities *What we will do*	Outputs *What we want to achieve*	Outcomes *What we want success to look like*
• Conduct five webinars on adult learning principles for case workers	• Train all case workers (Use) • Case workers are satisfied with the training (Response) • Case workers are knowledgeable in adult learning principles (Learning)	• Case workers use adult learning principles with their customers (Results) • Clients improve their relationship skills (Results) • Fewer customers require counseling (Results)

Once you develop a logic model, you should think about which of the five stages of T/TA delivery you are trying to assess. Do your outputs and outcomes involve content development, use, response, learning, or results? Will these outputs and outcomes help you to know whether goals are achieved or whether the results justify the costs? After answering these questions, you can then decide how to measure and monitor specific activities. You should also think about how to define each measure in light of your goals, such as what data to use, over what time period, and what calculations (for example, percentages or averages) you need. Exhibit 5 is an example of a plan from the hypothetical healthy relationship program.

Table 4. Example of a T/TA Performance Measurement Plan

Stages to measure	What you want to achieve (your outputs and outcomes)	Examples of measures	Data source
Content development	T/TA activities cover the key aspects of healthy relationships	% of workshops covering all aspects of healthy relationships	Workshop agendas reviewed to ensure content is consistent with best practices
Use	100% of case workers receive training on healthy relationship principles	Number of training participants divided by number of case workers	Tracking system for trainings
	Case workers see information in the healthy relationship toolkit	Number of hits to T/TA webpage	Website usage statistics
Response	Participants are satisfied with the format of the training	% satisfied with format of webinar	Survey of webinar participants on satisfaction
Learning	Case workers understand healthy relationship principles	% increase in knowing healthy relationship principles	Survey/test before and after the training
Results	Case workers relay healthy relationship principles to clients	% of clients who understand healthy relationship principles	Survey of clients before and after the program
	Savings from better outcomes outweigh training costs	Cost of training over savings from healthier relationships among clients (for example, fewer domestic issues, fewer counseling sessions, etc.)	Financial data on T/TA costs and client-related expenditures

How do you *use* these measures to actually improve your T/TA?

The best way to improve your T/TA is to review and understand the measures you collect. Hold frequent monitoring meetings with staff to review your performance results. Consider making these discussions part of an existing T/TA team meeting. How often you should review performance depends on how often staff deliver T/TA and in what form they do so. It might be useful to review performance shortly after each training session to inform the next training session, but when it comes to the products through which some training is delivered, looking at feedback from all products released in a quarter or a year might help you make decisions for the next year. The goal is to link the schedule for the monitoring meetings to specific T/TA activities in a way that best informs future T/TA efforts.

Whatever the frequency, the monitoring meetings should review performance metrics relative to goals (as outlined in your logic model), identify reasons for meeting or falling short of those goals, and develop strategies to improve your performance going forward. For example, if you find that recipients learn skills during the T/TA but that this knowledge is not leading to the expected result of applying those skills on the job, this may suggest that additional training is needed on when and how to properly apply the skills.

Your goal should be not only to hold providers accountable for achieving results but also to continually improve T/TA in ways that benefit the individuals and families who are being served. Performance measurement is only valuable if you use the information to improve.

How can you introduce more performance measurement into your T/TA?

If you provide T/TA directly, you can introduce performance measurement in your T/TA by developing a performance measurement plan and using some of the tools and strategies presented above. If you oversee contracted T/TA projects, you can require a performance measurement plan as part of a request for proposals. When you select a T/TA provider, follow through by including the performance measurement plan in the contract's scope of work or work plan.

You might not be able to measure everything that you want to know, at least initially. But you can get closer to this goal if you start small and work toward a comprehensive performance measurement plan. This approach helps to ensure that you will continually learn about the effectiveness of your T/TA, and it will inform policy makers and practitioners about what is and what is not working. By following the steps and considerations outlined in this toolkit, you can make your T/TA more effective and ultimately improve the programs and lives of the individuals and families that you serve.

For more detailed information on these and other issues, please see the Technical Appendix: Considerations for Measuring T/TA Performance*, available at https://aspe.hhs.gov/measuring-tta-effectiveness.*