



## A Case Example PDP Project Technical Assistance Visit —South Dakota—

### Program Context and Technical Assistance Requested

The Professional Development (PD) Coordinator from the South Dakota (SD) Department of Education, representing the four-member SD Coordinated School Health (CSH) Team, submitted a proposal for a Professional Development Partnership (PDP) Technical Assistance (TA) Visit to create long-term professional development (PD) goals and corresponding SMART objectives; a realistic, 12-month PD plan; and the development of effective PD marketing strategies. A critical need identified by the CSH Team was assistance with identifying and recruiting committed SD educators and other school staff and motivating them to attend training, request TA, engage in networking with colleagues - all in an effort to improve the health of SD students.

While a number of training and networking opportunities were already in place within the state, the effort involved in planning these opportunities and the lack of staff time and resources had been challenging. Additionally, attendance rates at training events were less than desired.

At the time of the TA request, the team of four had been employed in their respective positions only a few months. Thus, they also wanted TA on identifying the most effective roles and responsibilities each could take on to enhance the state's CSH program.

In context, the SD CSH professional development goals and program activities are an integral part of the state's larger CSH Program goals of working with administrators, school board members, health educators, community members, and parents to promote healthy lifestyle practices that reduce the risk of disease among youth. This work includes the provision of training, technical assistance, development of policies, implementation of health education and physical education standards and assessment, and other related services to public and private, and Bureau of Indian Affairs schools and communities throughout the state.

### PDP TA and Collaboration with the SD CSH Team

PDP staff conducted two conference calls and one face-to-face meeting with the SD CSH Team members prior to the TA Visit to refine the TA objectives, to create a meeting agenda and to begin the development of needed frameworks that would guide the TA process. Specifically, during the conference calls, the PDP and CSH Teams reviewed the components of the current SD professional development program; identified the perceived strengths and gaps of the PD process; and reviewed current PD materials and artifacts. As a result of those discussions, the PDP and CHS teams developed an overarching purpose and corresponding objectives for the TA Visit and an agenda (see box with objectives below). The TA Visit date was scheduled and an off-site location was chosen. It was agreed that meeting away from the office would free the CSH Team members to focus on the tasks at hand and would offer an environment that would promote "out-of-the-box" thinking.

**SD CSH TA Visit Objectives:**

1. Develop a PD structure that outlines effective, realistic roles and responsibilities for the SD team members;
2. Refine the SD professional development nested logic model;
3. Create a doable, year-long PD plan with long term goals, based on the PD nested logic model;
4. Develop SMART objectives, linked to goals and the logic model; and
5. Initiate a plan to evaluate PD events.

Two PDP staff members traveled to SD and facilitated the one-day TA Visit. During the TA Visit, special attention was directed at developing a comprehensive PD plan that included specific action steps, each of which was linked to the PD goal and SMART objectives, the PD nested logic model components, and the larger CSH cooperative agreement work plan. In addition, each action had a corresponding timeline. PDP staff also provided guidance regarding the application of Thomas Guskey's *Five Critical Levels of Professional Development Evaluation* to strengthen the evaluation component of the overall PD plan (Guskey, 2000). Through this process, four of the five TA Visit objectives were addressed. The CSH Team will address objective 2 at a later date.

## Results and Improvements

Since the TA Visit, substantial progress has been made in accomplishing the TA Visit objectives. The state's PD goals have been refined, SMART objectives and PD action steps have been developed that are more focused on key PD needs rather than on isolated training events, and the roles and responsibilities of SD CSH Team members have been defined. For example, according to the SD Professional Development Coordinator, SD CSH Team members have better targeted PD trainings, moving from a more "shotgun" approach to fewer, yet more effective trainings. Also the overall PD plan and timeline is more organized, and communication with the state's training cadre has increased and improved. The state has hired a training coordinator to manage and plan training events, including logistics, thus freeing up the state CSH Team members to focus more effectively on other key PD activities, such as marketing PD events, conducting follow-up with training participants and developing an evaluation plan for each of the PD program components (training, PD processes, etc).

"The PDP facilitators provided excellent direction and focus for us." ---- SD CSH Team member

## Future Actions

PDP and SD CSH Team members will continue to work together to refine the state's PD program. Examples of future PDP staff assistance include assisting the SD CSH Team with developing an agenda for a cadre Training of Trainers, identifying strategies for collecting CDC-DASH Indicators and developing and implementing methods for strengthening the skills of SD trainers.

**Reference:**

Guskey, T. (2000). *Evaluating Professional Development*. Thousand Oaks, CA: Corwin Press, Inc.

## A Case Example PDP Project Technical Assistance Visit —Connecticut—

### Program Context and Technical Assistance Requested

The Connecticut (CT) HIV Prevention Team requested technical assistance (TA) to address their need to increase the number of trainings offered as well as the number of participants attending the trainings, by refining and expanding marketing plans and activities for three training programs. The CT HIV Team had established training programs in HIV/STD prevention; health and mental health needs of lesbian, gay, bisexual and questioning students; and the state’s Health Education Assessment project. The CT staff had marketed their trainings with the use of a single brochure, and, based on low numbers of participants attending the trainings, were concerned that this strategy was not adequately reaching target audiences.

The state’s HIV Prevention Team collaborates with the state’s Coordinated School Health (CSH) program and Department of Public Health (DPH) staff, school-based staff and trainers, and the American Psychological Association’s (APA) Healthy Lesbian, Gay, Bisexual Students Project to design, organize and deliver training plans that reflect research-based practices and meet the needs of the state’s teachers and students.

### Professional Development Partnership Collaboration with the Connecticut Team

The Professional Development Partnership (PDP) staff and the core CT staff engaged in three planning sessions to prepare for the TA Visit. During the first meeting by phone, TA Visit objectives and agenda topics were discussed. A second phone meeting was used to further refine the objectives and agenda topics, and to also identify the types of marketing products that might be designed during the TA Visit. A face-to-face planning meeting occurred during the annual American School Health Association conference to finalize the agenda, participant list, and identify meeting logistical needs.

**TA visit objectives included:**

- Identify social marketing principles - the 8 Ps of Marketing;
- Refine marketing objectives within the state’s Professional Development Plan; and
- Develop a professional development marketing plan for HIV/STD prevention; the Healthy Lesbian, Gay, Bisexual and Questioning Students Project; and the Health Education Assessment Project.

The TA Visit involved twelve participants including the state-level HIV prevention program staff, CSH and DPH staff, members from the training cadre, an APA representative, and two PDP staff.

PDP staff facilitated an interactive process that addressed the three TA Visit objectives. They provided an overview of social marketing principles and strategies, and facilitated the identification of the state’s current marketing strategies, including the

strengths and gaps in each. Target audiences and social marketing methods for influencing audiences were identified for each of the three training programs.

Each of the three training cadres then met separately to develop a marketing plan and a corresponding action plan, based on the specific training objectives and participant groups for that cadre. The plans included agreed upon marketing strategies to engage the target audience, marketing products (e.g., brochures) that could be developed, and roles of team members to implement the plans.

"Excellent support and encouragement; good materials; a good introduction to marketing." ---- CT HIV/STD Prevention team member comment regarding PDP TA.

## Results and Improvements

Substantial progress has been made in accomplishing the TA Visit objectives. Separate brochures for distinct content areas, designed using new marketing strategies, have been created and distributed to target audiences. Updated information has been posted on the CT State Department of Education website regarding the distinct projects and respective training opportunities. The training cadre members also made personal connections at the local school level in an effort to increase the number of professional development offerings and to increase the attendance rates at professional development opportunities. During the 2005-2006 school year, over 25 professional development events were conducted. In addition, the cadres have regularly scheduled meetings for the purpose of improving their training skills, updating the marketing materials, and the developing new training opportunities.

## Future Actions

PDP and CT staff continue to work together to make any needed adjustments to the marketing plans. The PDP Team, has since, conducted an additional TA Visit and training on cadre development to further strengthen the CT HIV professional development process.

## A Case Example PDP Project Technical Assistance Visit —American Psychological Association —

### Program Context and Technical Assistance Requested

The American Psychological Association (APA), in partnership with the Connecticut and Delaware State Education Agencies, requested a Technical Assistance (TA) Visit from the Professional Development Partnership (PDP) in Year 1 of the PDP contract. The organizations asked for assistance in developing and implementing processes for sustaining a cadre of trainers, specifically during their Fall 2003 Training of Trainers. This cadre is responsible for conducting training on the Healthy Gay, Lesbian, Bisexual and Questioning (HGLBQ) Youth Project curriculum, a program developed as part of the APA CDC-DASH cooperative agreement. The curriculum targets school counselors, nurses, psychologists, and social workers in an effort to increase their capacity to prevent health risks and promote healthy behaviors among lesbian, gay, bisexual, and questioning youth.

APA's HGLBQ Youth Project goals for the Fall 2003 Training of Trainers (TOT) were:

- To increase the self-efficacy of the training cadre members to use the curriculum with professional audiences.
- To increase the capacity of the six national collaborating associations and the Delaware and Connecticut State Educational Agencies to continue to sponsor professional development events using the HGLBQ Youth Project curriculum after the APA cooperative agreement ends.

The APA collaborates with six national school health associations to reach its target populations by presenting the curriculum at state and national conferences sponsored by those associations. In addition, the Connecticut State Department of Education (CSDE) and Delaware Department of Education (DEDOE) partnered with APA when they were selected as pilot sites for implement the training curriculum

Since its inception in 2002, the HGLBQ Youth curriculum has undergone significant changes based on formative evaluations. The curriculum delivered at the Fall 2003 TOT workshop was familiar to some cadre members but new to those who had not taught the curriculum.

### Professional Development Partnership Technical Assistance and Collaboration with APA, CSDE, and DEDOE

Two PDP team members conducted four conference calls with core APA staff prior to the TA Visit. The conference calls provided a venue to share progress updates, identify and assign tasks, and jointly design the training agenda. The agenda was developed in two tracks in an effort to meet the needs of the APA trainer cadre members as well as the liaisons from the six national organizations. To further prepare for the TA Visit, PDP staff studied and critiqued the draft *HGLBQ Youth Project Trainer Manual* and PowerPoint slides used in the training modules. PDP staff made suggestions for revisions to the manual based on research and best practice related to adult learning and effective training strategies.

PDP TA Visit objectives included:

1. Assist in the review and revision of the Trainer Manual and PowerPoint slides.
2. Assist in designing the Training of Trainers two-track agenda to meet the needs of the trainer cadre and the six national organization liaisons.
3. Provide on-site technical assistance to cadre members and liaisons during the TA Visit.
4. Provide follow-up technical assistance and resources as requested.

PDP team members traveled to Washington, DC, and took part in the 2½ day TOT. PDP staff acted as process observers and mentors for the facilitators during the event. The TOT involved 28 participants including the CDC project officer for APA; three APA representatives; members of the training cadre from CSDE, DEDOE, and national organizations; and liaisons from the six collaborating national organizations. PDP staff observed the TOT, gave a de-briefing at the end of each day to APA staff who were leading the TOT and provided individualized TA for trainers. In addition, PDP staff provided a skill-building session during the TOT on professional development research and best practices, practical training tips, and adult learning strategies for the training cadre.

## Results and Improvements

Substantial progress was made in accomplishing the TA Visit objectives following the visit. PowerPoint slides were revised and a synopsis of the PDP TOT session, with support documents, was developed to include in the *Trainer Manual*. PDP staff sent requested professional development resources to APA staff including the link to the PDP website, a link to a website for warm-ups and energizers, and a list of strategies for working in small groups.

In a post TA Visit interview with PDP staff, the director of the APA HGLBQ Youth Project identified several benefits resulting from the TA Visit. Overall, cadre members' comfort level and self-efficacy increased. For example, trainers reported more confidence in their ability to facilitate a workshop and plan events efficiently, and they increased their ability to manage problem situations and difficult learners. The training cadre also reported that they were more aware and proactive regarding submissions to conferences and other venues to conduct trainings. The TOT facilitators and participants indicated that the hands-on activities, opportunities to walk through the steps of the training, and the content related to best practices for adult learners were most advantageous.

## Future Actions

Staff members from the PDP and APA continue to work together to refine the TOT model. PDP staff assisted APA with the design for a two-day TOT on April 20-21, 2006. Training segments focused on co-facilitation, reaching the adult learner and conducting quality action planning during training.