

Getting Started in Designing a Technical Assistance Program Checklist

This checklist is meant to supplement the *TA Toolkit*. It can serve as a guiding point for readers before they dive into the guidance or be a tool that readers use as they design their TA Program to ensure all aspects are meaningfully developed.

Step 1: Analyze Needs and Gaps

- Determine your funding source
 - Talk with your Administration team to understand your budget
 - Review [Contracting Guidance](#) to understand parameters of your funding source
- Evaluate Performance of Past TA Efforts and/or Grant Applicants
- Evaluate State, Agency, and Program Goals
- Perform Technical Analysis
- Assess Complementary TA Efforts
- Conduct Public Engagement

Step 2: Setting Goals and Intended Outcomes

Review the [Core Principles](#) to guide your work in this step

- Set Overall Program Goals
- Center Social and Racial Equity
 - Embed equity in the mission, vision, and values
 - Build equity into the process
 - Ensure equity outcomes
 - Measure and analyze for equity

Step 3: Determine the TA Program Structure

- Use the [In-House versus Third-Party TA tables](#) to decide if agency staff or a Contractor team will serve as the providers
- If you determine a third-party TA is the best approach, review the [Procurement Method](#) section to understand and identify which option to use
- Select your TA Approach(es)
 - Capacity Building
 - Application Assistance
 - Implementation Assistance
- Set your Community Engagement Strategy
 - Identify possible local partners and compensation options to collaborate on sharing the TA opportunity with priority communities
 - Start engagement early and sustain it throughout your effort
- Identify Metrics and an Evaluation Plan

Step 4: Identify a Funding Source

- Understand if you have Local Assistance or State Support funding available to you
 - Review your statutory or budgetary authority
 - Consult with your administrative or legal team
 - Reviewing the Contracting Best Practice section to understand how the funds can be used.
- If you do not have existing funds available, assess your options.
 - Coordinate internally with budget and administrative staff as well as leadership to determine if you would like to develop a budget change proposal and/or form a public-private partnership to access funds.

Step 5: Selecting a TA Provider and Recipients

Selecting a TA Provider

- Establish a selection process based on what you determined through Step 3
 - If a competitive process, assemble a review committee that will read and score bids
 - Ensure all reviewers have a strong understanding of the scope of work to ensure the right team is selected

Selecting TA Recipients

- Determine how many TA recipients you can meaningfully support
 - If you are only able to support a limited amount, determine what applicant types you would like to prioritize (such as tribal, rural, etc.)
 - Prepare communication materials that explain your prioritization publicly
- Develop your application or intake process to select TA providers

Step 6: Facilitate A Feedback Loop

- Routinely gather feedback on program design and TA delivery to increase accessibility and impact each funding round
 - Host listening sessions and webinars during the program development process
 - Survey applicants and TA recipients
 - Have regular check-in meetings or touchpoints with grantees/TA recipients
 - Facilitate peer learning opportunities
- Compile feedback in a central location
- Identify opportunities to disseminate your learnings
 - Share internally in staff meetings, briefings to legal and leadership, etc.
 - Share in interagency spaces, such as workgroup meetings or task force meetings
 - Incorporate learnings in your Budget Change Proposals or when forming private-public partnerships
 - Share in public forums, such as webinars or conferences