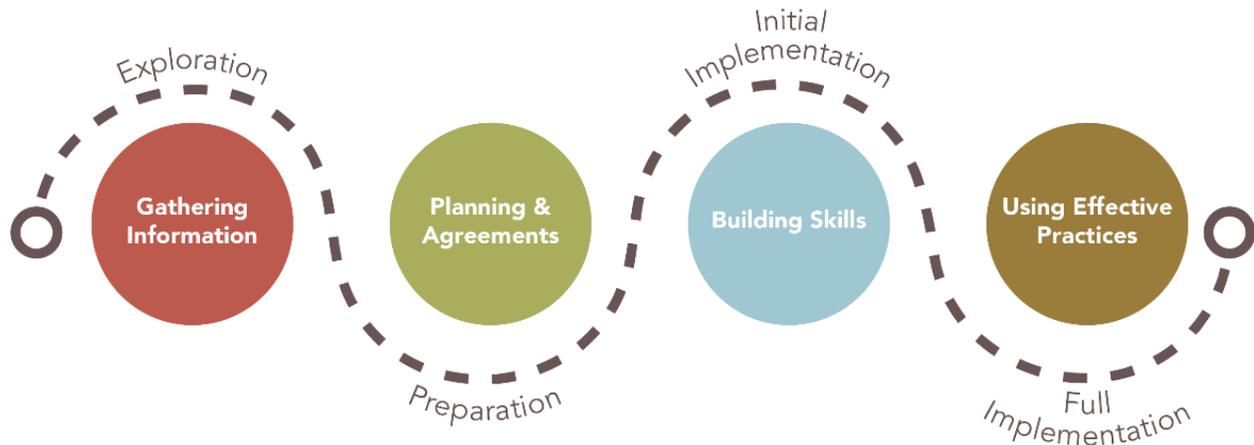


IMPLEMENTING EVIDENCE-BASED PRACTICES FOR CHILDREN WHO ARE DEAF-BLIND: A TA REFERENCE GUIDE



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HOW TO USE THIS GUIDE

This guide is intended for use by state deaf-blind projects to inform the provision of TA to early intervention providers, school-based teams, and families.* It is based on a synthesis and adaptation of implementation science and technical assistance literature and input from state deaf-blind project personnel based on their experiences providing TA to a diverse set of stakeholders.

The guide is organized by implementation phase. Within each phase, suggested strategies are arranged roughly in the order in which they are likely to be used under ideal circumstances. It would be a mistake, however, to see this as a step-by-step cookbook for providing TA. Implementation is a nonlinear process with activities that often overlap. It is common to circle back to strategies from an earlier phase or to compress activities from more than one phase into a single interaction with a team.

In addition, the guide was developed as a reference to meet the needs of deaf-blind project professionals dealing with a variety of situations and who have different levels of expertise. Some readers may find it most helpful to dip into specific sections to find ideas or tools to help meet an immediate need or to learn about a specific aspect of TA delivery. Others may wish to go through the whole guide from start to finish (this would be particularly useful for new personnel or for projects that want to thoroughly evaluate their current processes for providing child-focused TA).

Many of the strategies have associated "Advice from Colleagues" and "Tools & Resources." The latter category consists of links to factsheets developed specifically for this guide, tools contributed by state deaf-blind projects, and other useful materials.

* Throughout the guide, TA recipients are primarily referred to as "the team."

BACKGROUND

A key requirement for state deaf-blind projects is that they “increase the ability of SEAs, LEAs, LAs, EIS providers, and other agencies to use evidence-based practices to improve outcomes for children who are deafblind.”^{6, p. 39260} This mandate is consistent with trends in education and other fields, including public health, social work, and medicine, that aim to ensure that practitioners use the best knowledge available when providing services to their students or clients.

The impetus to identify ways to build the capacity of practitioners to use effective practices has led to a rapid expansion of research regarding strategies, resources, and setting characteristics that improve implementation. Consequently, this area of study is often referred to as *implementation science* (or implementation research). Research into technical assistance strategies that provide ongoing support to practitioners as they learn to implement new practices is an important part of implementation science.⁴

Why the Guide Was Developed

Implementation science literature primarily focuses on expanding the use of evidence-based practices for the benefit of large, homogeneous groups of individuals. In developing this guide, our goal was to work with state deaf-blind projects to show how implementation science knowledge is also applicable to TA related to the small, heterogeneous population of children who are deaf-blind. The work of deaf-blind project personnel differs from broader implementation efforts in two ways:

The work is much smaller in scope, typically focusing on a single team rather than the majority of educators in a school, district, or state. Because deaf-blindness is an extremely severe and complex disability, children who are deaf-blind require highly individualized programming.

State deaf-blind project personnel serve as external consultants. The vast majority of practitioners in early intervention and educational settings have limited or no training or experience in deaf-blindness, and schools and districts typically lack the internal expertise needed to obtain the knowledge and skills required to implement effective practices for children who are deaf-blind. The current system of deaf-blind projects funded by OSEP was designed to fill this gap.

In developing this guide, we relied heavily on preexisting frameworks intended to make implementation science findings applicable to the everyday work of building implementation capacity. The most visible example of this in special education has been through the State Implementation and Scaling-Up of Evidence-Based Practices (SISEP) Center. Funded by the U.S. Department of Education’s Office of Special Education Programs, SISEP was created to “help establish implementation and scaling capacity in state, regional, and district educational systems.”¹⁰

As part of its work, SISEP has made available numerous modules, lessons, and tools that convey practical knowledge about improving implementation capacity.⁸ Although the resources are primarily meant to inform broad efforts that impact relatively large groups of students, many TA providers at state deaf-blind projects have long recognized the value of this information in their work with educational teams that serve a single child. A goal of this guide is to extend that value by linking relevant aspects of SISEP’s model and other resources to strategies that support implementation of effective practices for children who are deaf-blind.

We hope this guide (and a companion guide under development intended to inform systems-change efforts to improve outcomes for children who are deaf-blind) will help the national deaf-blind TA network in the following ways:

- Provide a common vocabulary and organizing principles that enable us to increase our level of collaboration
- Inform our practice so we become more purposeful, structured, and effective in providing TA
- Share and organize resources and tools
- Define how national and state TA intersect
- Help orient new TA providers to the field
- Share what we know to benefit other low-incidence disability disciplines

How the Guide Was Developed

Development involved six interconnected activities:

1. Literature review (for a list of all the sources used to date, see References):
 - a. Existing implementation science frameworks
 - b. Other implementation science literature
 - c. Technical assistance literature
2. Synthesis of the parts of the literature that apply to deaf-blind TA network activities.

3. Solidifying and adapting the information to make it a good fit for the network.
4. Augmenting the information with existing tools and developing new tools as necessary (ongoing).
5. Creating a web-based product (as well as a printable pdf version) to make the content easily available.
6. Ongoing technical assistance to promote use of the information. Current plans for TA include online discussions related to the guide and specific tools, drop-in webinars on TA and implementation topics of interest, and peer-to-peer TA from states that have strong TA delivery systems. Please let NCDB know about the type of TA that would be helpful to you related to topics covered in the guide.

EXPLORATION PHASE (EP)

The goal of the Exploration Phase is to gather information about the needs of the child and how well his or her educational program, learning environments, and service providers are meeting those needs.¹ This phase is also a time to begin to build relationships with team members, assess their readiness to engage in TA and implement effective practices, and identify specific practices for team members to implement.



EP1. Getting Started

Typically, state deaf-blind projects begin work in the Exploration Phase by carrying out long-distance fact finding with potential TA recipients who have contacted a project for assistance. The strategies in this section outline activities that can be helpful during these initial interactions and highlight the importance of beginning to build good relationships from the earliest point of contact.

a. Engage in informal conversations with potential TA recipients

In response to TA requests, state deaf-blind project staff typically have one or more informal conversations via phone or Internet (e.g., Skype) with family members, teachers, or other school or agency contacts before making a face-to-face visit.

Note: The "Tools & Resources" section below includes several examples of forms created by state deaf-blind projects. Throughout the guide, items contributed by state projects are indicated by the state abbreviation after the item name.

Advice From Colleagues

Often TA means going out on a visit, but it can also take other forms—written information, a phone call, a webinar, or a video meeting.

Over the years I have begun to think about how to maximize the efficiency of my TA, so I do some digging before I go out to visit a team. It is not possible to treat TA in the same way as being an itinerant. A lot of my initial time is spent over email or on the phone, prodding a bit to see what may be helpful and building a relationship. What they identify at first, though, may not truly be what they need, so don't hesitate to go out with one idea and then once you're there, shift or adjust your approach as you get to know them better.

Tools & Resources

- [Request for TA Form \(CA\)](#)
- [Agency Request for Consultation \(KS\)](#)
- [TA Request Form \(NE\)](#)
- [TA Request Form \(VA\)](#)

b. Provide information

As part of initial connections with individuals, schools, or agencies who request TA, share brochures or other information about your project as well as basic information about deaf-blindness.

Advice From Colleagues

Giving people webinars, resources, videos, etc. to watch before you visit is a good strategy, so they have a foundation for what you are going to discuss.

Tools & Resources

- [Family Letter \(TX\) - English](#)
- [Family Welcome Letter \(TX\) - Spanish](#)
- [New to Deafblindness? Five Tips for Administrators](#)

c. Ask for reports about the child to be sent to you in advance

It can be helpful to have information about a child sent to you before a visit, if possible. This might include:

- Audiological and ophthalmological reports
- A description of the child in writing (e.g., basic information about communication)
- IEPs/IFSPs

In some cases, a state project may ask a school team or parent to complete an assessment in advance, such as the *Communication Matrix*, *HomeTalk*, or functional vision and hearing assessments.

Advice From Colleagues

We require a description of the child in writing (e.g., basic information about communication), but it isn't always realistic to insist on certain types of documentation. Many students haven't had good assessments and the documentation doesn't exist. Sometimes the only reliable information you have about a child is what educators and parents tell you.

It's always good if the team provides you with information in advance, but if you have too many hoops for people to go through, it can interfere with establishing a relationship.

Tools & Resources

- [Family Welcome Guide \(TX\) - English](#)
- [Family Welcome Letter \(TX\) - Spanish](#)
- [New to Deafblindness? Five Tips for Administrators](#)

d. Identify team members

Clarify who is on the team that will be receiving TA and help them determine if additional people should be involved.^{1, 20} Potential team members may include:

- Teachers
- Other professionals (e.g., orientation and mobility instructor, speech therapist, occupational therapist)
- Interveners or other paraprofessionals
- Administrators
- Parents or other family members
- The student, if appropriate

Advice From Colleagues

Students who can advocate for themselves are important team members. If they are capable of participating, they should be included.

It is essential to work with educators to help them ensure that families are actively involved in decisions that are made for their child.

Tools & Resources

- [Teaming Factsheet](#)

e. Foster relationships

Begin to build a positive, collaborative relationship between yourself and the team:¹²

- Establish trust and confidentiality
- Show empathy for recipients' struggles and challenges
- Promote positive, open communication

A strong partnership supports open communication and is an important driver of success when outcomes involve behavior change.

Advice From Colleagues

It's important to notice what people are doing well, praise them, and build from there ("What I'm thinking is that down the road we want...").

With intensive TA, I want to build a friendly, long-term relationship, so it's important not to move too fast. I try to be very positive in initial interactions and follow the adage of nine positive comments for every suggestion. No one is required to let me in the door. You have to support the student, but do it in a way that ensures everyone is willing to work together.

The relationship piece is really important. If you help the team solve a problem, then you get buy-in.

Tools & Resources

- [Relationships in TA Factsheet](#)

EP2. Determining (and Creating) Team and Agency Readiness

Readiness refers to the willingness and ability of a team and school (or other agency) to engage in the TA process and effectively implement new practices and programs.^{1, 13}

Determining readiness can help you:

- Prioritize potential TA sites (e.g., if able to provide TA to only a limited number of sites)
- Identify sites where TA is unlikely to be effective (e.g., because of lack of readiness, a team would have difficulty responding to the type and level of TA you can provide)
- Identify areas where knowledge, skills, or motivation are lacking so they can be addressed by TA

Readiness exists on a continuum. It's not a simple matter of "ready" or "not ready."¹³ When assessing readiness, you may identify factors that indicate a lack of readiness that you can work with the team to address. On the other hand, you may find that moving forward with TA is not appropriate given the presence of serious barriers (e.g., lack of administrative support).

a. Provide information about TA to the team

Understanding, in advance, the nature of the TA that will be provided helps recipients gauge how well it will fit their needs.²⁹ Helpful information includes:

- The content being offered

- Team member and school or agency responsibilities
- The intensity of the TA and its likely duration

b. Conduct a readiness assessment (formal or informal)

Various elements of readiness have been identified and research suggests they fall into two categories—motivation and capacity (i.e., being willing and able).¹³ There is, however, no widely agreed-upon definition or tool for assessing practitioner or agency readiness, so it may be most practical to conduct these assessments informally during the course of your interactions with team members. The document under "Tools and Resources" below, provides ideas for readiness indicators to consider.

Advice From Colleagues

You do the best you can, but it's easy to misread situations. Sometimes things go the opposite of the way you think they will. A team you don't expect much of may rise up. A team with strong administrative support may fall apart or their commitment wane over time.

Tools & Resources

- [Readiness Indicators for Child-Specific TA](#)

c. Obtain buy-in

Gaining buy-in from team members and administrators is recognized as a key factor in the adoption and use of new practices.^{4,20} To foster and maintain buy-in:

- Involve organizational leadership—change is more likely when it is supported by administrators²⁰
- Make sure instructions for what the team will implement are clear and concise^{9,14}
- Use the following strategies to increase motivation:^{1,4}
 - Use data to emphasize the child's needs
 - Celebrate small successes and progress
 - Address concerns, questions, or resistance
 - Address barriers that need to be lessened or removed
 - Identify team members who can serve as champions who inspire and lead others to implement

- Provide information and allow individuals time to process what the change might mean for them

Advice From Colleagues

Sometimes assessing whether people are ready for TA overlaps with helping them get ready. You may have to "sell" what you have to offer or, during initial interactions, provide simple information that will help them have an early success with a child. This helps to build "buy-in."

d. Ask the team to complete a task and check to see if they have followed through

Good follow-through on early recommendations is one indicator that a team is ready for more intensive TA. You might ask the team to:

- Participate in a large-group training event
- Complete one or more OHOA modules
- Participate in a webinar as a team
- Engage in an online meeting to evaluate needs
- Assess an area of student need that relates to a potential TA activity

Advice From Colleagues

A colleague once shared with me something she called the "Rule of 3." She would give teams three things they needed to do before her next visit or she would keep track of the number of times a team had not followed through and give them three chances.

Differing motivations among team members are a challenge. Some people are incredibly motivated and others sign on without really wanting it. You can try to weed out people who are less committed, but at the same time you don't want to make the TA process too onerous because the people who really need it might not get it.

e. Avoid taking sides if there is conflict among team members

Try to stay as neutral as possible in situations where different team members, such as family members and school personnel, strongly disagree about the needs of or best course of action for a child. Refer families to local advocacy agencies when needed—e.g., parent centers, legal aid, agencies for persons with disabilities.

Advice From Colleagues

People in disagreement may want you to be a referee, but that is not the role of the state deaf-blind project. You have to let them know that you don't take sides. Sometimes disagreements are due to lack of content knowledge, so initial assistance might involve providing information or pointing them towards the OHOA modules. Anything you provide should be given to both sides.

EP3. Assessing Needs and Identifying Outcomes

The activities in this section are closely linked. They involve identifying a child's needs, determining the team's current capacity to meet those needs, and figuring out solutions to build the knowledge and skills team members must have to implement effective practices for the child.

a. Conduct a needs assessment

A thorough needs assessment provides the foundation for identifying appropriate goals and outcomes.^{1, 4, 12, 20} It should be conducted with the team (including family members) to gain a comprehensive understanding of the scope of the need and model collaboration.¹² Specific activities include:

- Collecting and analyzing child-specific information (e.g., medical reports, IEP, assessment data)
- In-depth discussions with team members:¹²
 - Create a “space for mutual learning” to clarify, adapt, and improve the TA request
 - Keep in mind that team members may not always be able to easily articulate their needs (what they actually want and need may be different from their initial request)

- Use of specific instruments to define and quantify the needs of the child and characteristics of the classroom and school that impact the child
- Assessment of team member knowledge and skills

The tools and resources below link to a number of items that can be used to assess characteristics of students, programs, classrooms, and personnel, including various examples from state deaf-blind projects. There are also links to other resources that may be helpful during this phase. For example, the CEC intervener and teacher standards are not needs assessments but outline knowledge and skills recognized as important for working with children who are deaf-blind.

Advice From Colleagues

Needs assessment is not a singular event that occurs at the beginning of TA. It's ongoing in nature. This is especially true during long-term TA relationships where new issues and areas of need crop up as others are resolved.

Tools & Resources

- [Communication Profile \(to be completed by parents\) \(OK\)](#)
- [Independent Living Inventory \(Ages 5-12\) \(NJ\)](#)
- [Independent Living Inventory \(Ages 13-21\) \(NJ\)](#)
- [Work Place Skills Inventory \(Ages 16-21\) \(NJ\)](#)
- [Liaison Self-Assessment \(HI\)](#)
- [IEP Quality Indicators \(TX\)](#)
- [Classroom Observation Instrument \(NTAC\)](#)
- [Technical Assistance Checklist \(NTAC Area 4\)](#)
- [CEC Teacher Competencies](#)

b. Provide information about child evaluation tools and procedures

Although state deaf-blind projects don't typically conduct in-depth developmental or educational evaluations of children, they often recommend tools for teams to complete and provide advice about appropriate evaluation methods. Links to several common assessments as well as information pages on the NCDB website are provided below.

Tools & Resources

- [HomeTalk](#)
- [Communication Matrix](#)
- [Literacy Skills Checklist \(NCDB\)](#)
- [Assessment Overview \(NCDB Library\)](#)
- [Assessment Tools and Instruments \(NCDB Library\)](#)

c. Identify desired goals and outcomes

Needs assessment findings are used to determine specific goals and outcomes, 1, 4 which are typically related to:

- Increased team member knowledge and skills
- Child change
- Classroom change

Discussions with a team should result in very specific goals and outcomes (for the child and the adults) that can be realistically achieved given the resources of the team and the state deaf-blind project. For example, if the goal is for a student to use an object calendar, conversations might include the following questions:

- Will the administration release staff for the time needed to train, plan, and problem solve?
- Will parents be able to share information and help the team select objects?
- Can the state project provide support and training at the times the team has available?

Advice From Colleagues

Usually the team talks about child outcomes, while our project thinks in terms of adult learning objectives and sets up TA accordingly (i.e., a series of activities or objectives for the adults to accomplish).

I like to ask teams, "What is it that you would like to be different at the end of our time together?"

The IEP can be a great planning tool. You can use it to discuss the student's goals and his needs related to those goals. Then you create a plan, schedule, and list of what the team needs to do.

I like to share with the team what I've observed about the child and his or her program and then work with them to determine targets for TA. There are always so many needs . . . you could do a million things, so together we identify what is most important and pick a few needs to address first. Ultimately, to get buy-in, you have to let them determine what they will work on.

Tools & Resources

- [TA Agreement \(NJ\)](#)

EP4. Assessing Your Project's Capacity to Provide the Required TA

Most activities that occur during the Exploration Phase focus on the needs, characteristics, and goals of a specific child and team. It is also important, though, to take time to consider whether a particular TA case is a good fit for your project.

a. Determine the types of challenges the TA is likely to involve

A number of experts advise thinking about efforts to address needs or problems from the perspective of the types of challenges they present. While this is typically meant to apply more to systems change efforts,^{2, 23} it may also be helpful for planning individualized TA.¹²

Challenges can be thought of as "technical" or "adaptive."

Technical challenges

- Team members agree about the characteristics of the situation (e.g., the child's needs and their own training and TA needs)
- Solutions to address those needs are relatively clear

Adaptive challenges

- Team members have different perspectives about what is needed
- Potential solutions are unclear

Technical challenges typically respond to a content-driven approach (e.g., training and information). Adaptive challenges require a more strategic, relationship-based, facilitative approach. TA almost always occurs in situations that involve a mix of technical and adaptive challenges.¹²

Advice From Colleagues

People tend to think of solutions as only technical things—coming up with the right intervention. But in reality, that is a very small part of it. The adaptive work of getting buy-in from the team through collaborative problem-solving is equally, if not more, important to being successful.

b. Determine the type of TA likely to be required to achieve significant impact

TA is typically classified as:

- Universal, General
- Targeted, Specialized
- Intensive, Sustained

See below for complete definitions of each.

Tools & Resources

- [OSEP Technical Assistance Definitions](#)

c. Determine whether the identified needs can be met by your project

Once you have a sense of the nature of the TA that will be required, the following questions can help you determine whether a particular case is a good match for the mission, expertise, and available resources of your project:

- Is taking on this request appropriate given the scope of our project and our funder's expectations?
- Do we have the expertise to meet the need?
- Do we have the resources to meet the need (including connections to other experts)?
- Is use of the resources required worthwhile given other priorities?

EP5. Selecting Practices or Programs for the Team to Implement

Selection of specific practices or programs that team members will implement to help a child achieve desired outcomes is the last step in the Exploration Phase. Implementation of these

practices/programs will be the focus of the work the state deaf-blind project and team do together.

a. Select the practices or programs that best meet the child's needs

With the team, discuss the range of practices or programs likely to lead to achievement of the identified child goals and outcomes.^{1, 4} These might involve:

- Conducting specific assessments (e.g., functional vision/hearing, communication, learning)
- Using new instructional strategies
- Modifying existing instructional strategies

From these options, choose the specific practices or programs the team will implement. The selected practices should be supported by literature that provides a strong conceptual rationale and shows that they are research based or accepted professional practice.¹¹

Advice From Colleagues

I like to pick two or three changes to start with. When considering potential practices, I ask the team members, "If we implemented this, what child changes would we see? Which changes would lead to the most improvement?"

Choose interventions that immediately address the team's concerns and are reasonable to use. When someone begins to give you a hint that something you're suggesting is not going to happen, it's probably not going to happen. If you can find another strategy that will have the same outcome and is more likely to be implemented, use that instead.

Tools & Resources

- [Evidence-Based Practices for Students With Sensory Impairments](#)
- [Assessment and Instruction of Students Who Are Deafblind: What Is the State of Our Evidence? \(Webinar\)](#)

b. Clearly define the practices or programs

Interventions that are clearly defined are easier for team members to learn and use.^{1, 7, 9, 12}

Concise written descriptions of essential elements help to:¹

1. Ensure that the practices are teachable, learnable, and doable (you may find it useful to locate or create a document that has step-by-step instructions and illustrations)
2. Provide criteria (behaviors or actions associated with a specific practice) that you can use as the basis for a checklist or other evaluation tool to measure whether service providers and families are implementing the practices with fidelity

Advice From Colleagues

We tend to suggest interventions that are already well defined and have research backing them.

c. Adapt practices and programs as needed

It is often necessary to tailor a practice so it is a better fit for a specific child, family, school, or district.⁴

Advice From Colleagues

You can't just replace what is currently happening for a child—you have to build from where the service providers are.

Things have to be reasonable and doable, or be adapted to make them doable. You never set your kids up for failure. Why set the adults you work with up for failure?

PREPARATION PHASE (PP)

The goal of the Preparation Phase is to get ready to provide TA. It primarily involves extensive planning based on information collected during the Exploration Phase. This stage also involves forming agreements with the team and school or other agency to clarify roles and responsibilities, confirm that the organization can and will provide necessary resources, and ensure that the administration is supportive.

In the SISEP framework, this phase is referred to as the Installation Stage.¹ We chose to use the term "preparation," instead because child-focused TA work does not involve the same level of operational detail that is required for large-scale systemic change.



PP1. Developing a Technical Assistance Plan

Guided by data gathered during the Exploration Phase, develop a formal TA plan.^{4, 12, 20} The goal is to create a plan that:¹²

- Facilitates change
- Provides structure to guide the process
- Reflects a mixture of content-driven and relationship-based approaches
- Is consistent with your own strengths and preferred ways of working

Creation of a TA plan typically involves negotiation with team members and administrators to ensure they are committed and will provide needed resources.

a. Share the plan with the team and administrators as part of a TA agreement

It is helpful to develop a TA agreement at the same time the written TA plan (incorporating the strategies below) is created. Depending on your preferences and the situation, the agreement may include the whole plan or just relevant elements. (See “Tools” for some examples.)

Having team members sign an agreement increases the likelihood that they will follow through with their commitments.

Advice From Colleagues

In addition to indicating commitment, a TA agreement helps focus the team on realistic outcomes and gets everyone on the same page.

Tools & Resources

- [Service Provision Worksheet \(DE\)](#)
- [TA Agreement \(NJ\)](#)
- [TA Consultation Agreement \(KS\)](#)
- [Family Consent for Services \(MI\)](#)
- [Targeted/Specific or Intensive/Sustained TA Agreement \(VA\)](#)
- [Universal/General TA Planning Form \(VA\)](#)
- [TA Agreement Example 1 \(VA\)](#)
- [TA Agreement Example 2 \(VA\)](#)
- [TA Agreement Example 3 \(VA\)](#)

b. Summarize information collected during the Exploration Phase

The plan should include a summary of the key findings gathered and decisions made during the Exploration Phase, including:

- Child and agency details
- Specific practices or programs to be implemented
- Desired goals or outcomes
- The level of TA required (universal, targeted, intensive)

c. Outline roles and responsibilities

Provide clear expectations regarding team member roles and responsibilities and your responsibilities as the TA provider.

Advice From Colleagues

It is very helpful to have a "team leader" when providing TA to groups. This ensures that the team keeps moving forward in their work!

d. Outline operational details

These include timelines for specific tasks, a meeting schedule, and resource requirements such as:¹

- Organizational or structural changes (e.g., changes to scheduling or staffing needed for the program to work)
- Release time for staff training
- Non-human resources (e.g., equipment, space, technology)

e. Select TA strategies

A key section of any TA plan is a description of the TA activities and strategies most likely to lead to change and build capacity.¹² Details about specific TA strategies are provided in the Initial Implementation Phase section of this guide:

- Group Facilitation Strategies
- Training
- Skill Development Strategies
- Peer-to-Peer TA Strategies

Tailor the strategies to address strengths, challenges, and barriers identified during the needs and readiness assessments conducted during the Exploration Phase.²⁰

f. Include a communication plan

A communication plan provides details about how the team should contact you and how you will share information (e.g., progress updates, issues that require discussion and action) with team members, administrators, and other relevant stakeholders throughout the TA process.¹

Identify one person from the team to be a single point of contact with whom you can reliably communicate.

PP2. Developing an Evaluation Plan

Evaluation of technical assistance does not have to be daunting. The two primary purposes are to:

1. Collect information for yourself as you provide TA so you can make adjustments as needed or plan overall improvements for your project
2. Collect information for required reports (e.g., for OSEP or your state department of education)

The type and intensity of evaluation depends on what you need and want to collect to serve these two purposes and is influenced by a variety of factors, including the intensity of the TA you are providing, where your project is housed, and your project's internal procedures.

a. Determine what you will evaluate and why

The following are common areas of TA evaluation:

Team/agency readiness¹³

The degree to which a team and school or other agency are willing and able to engage in TA and implement new practices. It is typically evaluated during the Exploration Phase, but you may want to reassess it during the Initial Implementation Phase to identify ongoing or emerging problems.

Fidelity of the TA process

The degree to which your own TA is consistent with good TA practice and conducted as outlined in the TA agreement or plan.

Technical assistance content

The degree to which the information or training delivered through the TA is relevant, useful, and of high quality.

Change in knowledge and skills¹²

The degree to which service providers and families are progressing in areas where a need for knowledge and skill development has been identified.

Fidelity of implementation^{1, 3}

The degree to which service providers and family members are implementing key components of effective practices as intended (see Exploration Phase: Selecting Practices or Programs for the Team to Implement).

Child change¹

The degree to which goals and outcomes for a child are being achieved. This can be communicated to a team to support implementation or reported to state agencies.

b. Determine data collection sources and methods

Depending on your needs, you may collect data from parents, teachers, administrators, or other team members. Apply your experience working with various groups to determine the most effective and efficient ways to gather information. For example, you may have found that parents prefer direct conversations, while service providers do better with short surveys.

There are a variety of different ways to collect data, including:

- Self-report (e.g., via survey)
- Pre/post tests
- Observation
- Informal conversations and written exchanges
- Analysis of TA plans and notes

The methods you choose are highly dependent upon available resources, including:

- Time (this is especially important if you plan to gather observational or qualitative data that is time consuming to collect and summarize)
- Existing surveys or checklists
- Electronic survey software
- TA logs and summaries
- Observation tools (e.g., *Classroom Observation Instrument*)

Advice From Colleagues

Measuring change in service provider, family, or child outcomes can be time consuming and intensive in nature. While observational data is richer and more reliable, it is probably not realistic to gather it extensively.

Tools & Resources

- [TA Evaluation Methods Factsheet](#)

c. Determine how you will analyze your data to meet your needs

The data you collect will likely be in several forms (e.g., ratings, narrative, multiple choice responses). Decide how to organize it so that you can:

- Keep track of it over time
- Provide feedback to guide practice
- Produce annual reports
- Produce summaries for stakeholders

d. Create a data collection timeline

Determine when and how frequently you will collect specific data. The timing is dependent on your reasons for collecting the data. For example:

- During the Initial Implementation Phase, you are likely to be collecting data to provide immediate feedback on how things are going or to identify new needs that have arisen so you can adapt your TA accordingly.
- During the Full Implementation Phase, you may collect data to include in your annual report.

Advice From Colleagues

Trust between adults is just as important as trust between adults and children who are deaf-blind. Communication develops as the result of a personal connection.

No one is going to change their practice based on advice from somebody they don't trust or like.

Tools & Resources

- [Relationships in TA Factsheet](#)

INITIAL IMPLEMENTATION PHASE (IIP)

Initial Implementation is the phase when team members are beginning to use new skills and implement selected practices.¹ The role of the TA provider during this time is to deliver training and use TA strategies (e.g., consultation, support for team collaboration) to build team member capacity to implement the practices with fidelity.

The information provided in this section includes an array of TA strategies. Selection of strategies for a given team should be guided by needs and readiness assessment findings and specified in the TA plan.



IIP1. Providing Structure

The suggestions below are general strategies that provide structure throughout the Initial Implementation Phase. Subsequent sections cover specific technical assistance and training strategies.

a. Assess implementation supports

Ensure that agreed-upon implementation supports (e.g., release time, equipment) are present and operational as specified in the TA plan.¹

b. Strengthen your relationship with the team

Initial Implementation is a fragile, awkward phase when the team is trying new ways of interacting with a child and the difficulties associated with change provide strong motivation “for giving up and going back to comfortable routines (education as usual).”¹ A strong, positive relationship with the TA provider can motivate team members to persevere.¹²

c. Conduct evaluation as specified in the evaluation plan

Throughout the Initial Implementation Phase, it is important to periodically assess how things are going and make adjustments as needed. The SISEP motto for this stage is “Get started, then get better!”¹

Evaluation during this phase helps you provide feedback to the team and determine if it’s necessary to modify your own TA. It is often informal and may include:

- Team readiness (to see if things have changed since the Exploration Phase)
- The fidelity and quality of your technical assistance³¹ (according to your own self-assessment or feedback from team members)
- Change in knowledge, skills, beliefs, or attitudes of service providers/families
- Fidelity of implementation by service providers/families¹
- Child outcomes¹

IIP2. Employing Group Facilitation Strategies

This section features strategies you may find helpful in bringing team members together to strengthen relationships and communication.^{12, 20} For ideas and recommendations about how

to facilitate in a range of situations, see the Facilitation Factsheet. Facilitation is the foundation for virtually all other TA strategies.

a. Organize and facilitate team meetings

Facilitate discussions that allow team members to share concerns, questions, and ideas. These types of meetings provide “protected time to reflect on the implementation effort, share lessons learned, and support one another’s learning.”²⁰

Tools & Resources

- [Teaming Factsheet](#)

b. Facilitate relationships among team members

Difficulties among colleagues or stakeholders can present a barrier to implementation, but through skilled facilitation, you can:¹²

- Help team members create a shared vision
- Inspire commitment and action
- Encourage the involvement of all members
- Improve communication
- Promote awareness that tasks require collaboration or, at least, input and support

As you work with teams, be aware of how personal and organizational characteristics influence the effectiveness of teams and their response to TA:¹²

- Personal—personality, attitudes, beliefs, goals, perceptions, expertise, position and level of influence in the organization
- Organizational—fiscal and personnel resources, leadership, urgency of need

Advice From Colleagues

Ideally, you hope that the staff working with a child are already functioning well as a team, but that isn't always the case. It is often the state project that brings teams together. TA frequently involves building teaming skills and explaining how important teams are for kids who are deaf-blind.

Tools & Resources

- [Group Facilitation and Problem-Solving \(KU Community Tool Box\)](#)
- [Teaming Factsheet](#)

c. Maintain communication using the process described in your TA plan

As you work with a team, be sure to keep all relevant parties (e.g., families, administrators, all team members) “in the loop” by providing:¹

- Updates on progress (including celebrating successes)
- A venue for questions
- Opportunities for clarification and problem solving

d. Identify and prepare champions

Champions are individuals internal to a school or agency who are dedicated to supporting new ways of doing things.²⁰ The team members who are most dedicated to successful implementation of targeted practices and programs can be influential in overcoming barriers or resistance to change.

IIP3. Conducting Training

This section features strategies you may find helpful in bringing team members together to strengthen relationships and communication.^{12, 20} For ideas and recommendations about how to facilitate in a range of situations, see the Facilitation Factsheet. Facilitation is the foundation for virtually all other TA strategies.

a. Determine training topics and learning objectives

Preparing to provide training typically includes:

- Using needs assessment findings to identify the training needs of team members
- Identifying the type of learning that is required:¹⁷
 - Knowledge based
 - Skill based
 - Attitude based
- Writing concrete, measurable learning objectives
 - Breaking content into concise components makes learning easier. The more complex something is, the harder it will be for the team to implement.¹⁴
 - Effective Adult Learning under “Tools” includes excellent, user-friendly information about developing learning objectives.
 - If the training will involve teaching specific practices, learning objectives should relate to the key components of the practices that were defined in Selecting Practices or Programs for the Team to Implement (Exploration Phase).

Advice From Colleagues

When I provide training, I like to find out from team members whether they are engaged in other professional development activities at the same time. If they are, I will have a conversation with them about the content of the other training and whether it aligns with what they are learning from me. This allows me to clear up any confusion they may have and, whenever possible, relate the other training to what I am providing.

Tools & Resources

- [Effective Adult Learning: A Toolkit for Teaching Adults](#)

b. Select a delivery method

The delivery method used depends upon the purpose of the training (i.e., learning objectives), the number of participants, and available resources.¹⁷ Training that consists of one-on-one or small-group interactions between the TA provider and team members overlaps with consultation and coaching as described in *Employing Skill Development Strategies*.

Possible delivery methods include:

- In person (one-to-one or small group)
- Workshop or other group-based training (away from the child’s educational setting)
- Distance (e-learning)
- Provision of information for self-study

When training on introductory topics (e.g., overview of deaf-blindness), it is often more efficient to either:

- Hold a single large-group event for personnel from multiple sites and teams
- Ask team members to complete a distance learning module

Advice From Colleagues

Often we walk into situations where we are starting from scratch and there are no personnel who have any training in deaf-blindness. In this situation, I have found that having the team gain some basic background knowledge prior to on-site visits can be helpful. I now use an online module or send a resource appropriate to the topic for them to read or complete ahead of time. This makes it possible to devote on-site or distance TA time to child-specific strategies rather than general information.

c. Develop training content and activities

Select content and instructional methods for each learning objective.^{1, 4, 20} Options include:¹⁷

- Small-group discussions focused around case studies
- Lectures
- Simulations
- Experiential learning
- Self-study (e.g., use of a module)

Tools & Resources

- [Effective Adult Learning: A Toolkit for Teaching Adults](#)

d. Use existing training opportunities when appropriate

Instead of developing training, check to see if there are existing training options that address identified learning objectives, such as:

- Online modules
- Webinars
- Videos or webcasts

Tools & Resources

- [Open Hands, Open Access Modules](#)
- [Distance Mentorship Training Modules \(for login, contact Jon Harding at \[jharding@kssdb.org\]\(mailto:jharding@kssdb.org\)\)](#)
- [Perkins eLearning](#)
- [Perkins Webcasts](#)
- [NCDB: Events & Training](#)

e. Gather (or develop, if necessary) handouts and other resources

To avoid overwhelming team members with too much information, it is usually best to share short, to-the-point items. This depends, however, on each individual's preferences. Some people learn best by reading and prefer detailed resources.

Types of materials you might provide include:

- Step-by-step written instructions on how to do each practice or intervention
- Manuals
- Guidelines
- Factsheets
- Articles

Advice From Colleagues

I like to be able to provide a peer-reviewed article for the administrator, a detailed handout with illustrations and a sequence of steps for staff on how to do the intervention, and clear handouts at various reading levels for family members.

Tools & Resources

- [NCDB Library](#)
- [Dissemination Plan \(NE\)](#)

f. Link training to professional development or continuing education requirements

Explore opportunities to link the training you provide to CEUs (e.g., ASHA, ACVREP) to encourage practitioners to participate.²⁰ This is more of a systems-change strategy than something that would be done for an individual TA case, but it may be worth looking into for use across cases. The difficulty of getting this type of systemic change in place will vary from state to state.

Advice From Colleagues

Offering CEUs and certificates of completion for professional development activities is key for buy-in—not only from the professionals themselves, but also from administrators.

The ease of getting approval for CEUs depends on the professional organization. For example, for sign language interpreters it is quite easy and very low cost. You simply have to find an approved sponsor and submit the appropriate paperwork. For larger organizations it can be extremely time consuming and costly. You will want to find someone who is affiliated with the appropriate professional organization and knows the procedure through and through.

IIP4. Employing Skill Development Strategies

This section covers strategies that can be used to augment learning acquired during structured training activities.^{12, 20} Research shows that training without follow-up support has a very minimal effect on the quality of practitioner implementation.^{5, 16}

a. Ongoing consultation

Consultation, a key element of implementation support,²⁰ is a collaborative problem-solving process in which TA strategies are used to address questions or problems that arise related to the implementation of practices or programs and teach specific skills.

It typically involves:

- Observation and feedback regarding staff interactions with a child (either via video or in person)^{15, 20}
- Observation and advice related to the child’s learning environment and program¹⁵
- Modeling of the practices and ways of interacting with the child that you would like team members to implement

Tools & Resources

- [Consultation Factsheet](#)

b. Develop an online system for distance consultation

Distance consultation involves the same TA practices used during face-to-face interactions, but makes it possible to have more frequent, in-depth contact between state project personnel and teams that are often many miles away. The Distance Mentorship Project (DMP), an online consulting model developed in Kansas, provides an example of how to do this. It consists of three technology elements:^{18, 19}

- Exchange of video clips showing a student in action during key routines
- Monthly web-based video conferences
- A team collaboration website to post:
 - Video clips
 - Questions and comments that form the basis for online discussions
 - Monthly meeting notes with action plans
 - Articles and links to websites or training opportunities where a team can learn more about deaf-blindness

Prior to distance interactions, one or more on-site visits are necessary to begin creating a trusting relationship. This is essential in order for distance mentoring to be successful.

Advice From Colleagues

One thing that is unique to distance TA is that because all team members are included in the team site, everyone has an equal chance to weigh in with their opinion when issues arise. Consensus can be achieved faster and the results are usually better, since you've collected the opinions of the entire team. In contrast, when you do on-site TA, related service providers may be present just briefly or not at all, so you only get a partial picture of the child's needs.

Because conversations about decision making occur in a running log on the site, you have a comprehensive way of collecting what has been discussed and tried.

Tools & Resources

- [Distance Mentorship Facilitator's Guide](#)
- [Distance Mentorship \(Perkins Webcast\)](#)
- [Making Online Technical Assistance Connections: The Kansas Distance Mentorship Project](#)
- [Team Collaboration Site Template \(PBWORKS\)](#)
- [Team Collaboration Site Template \(Google\)](#)

c. Coaching

Coaching is regular, embedded (e.g., in the classroom) professional development designed to help service providers implement specific practices with fidelity.^{24, 25} It involves using a somewhat formal process that includes modeling, prompting, and repeated evaluation of a service provider's performance of targeted skills.

Coaching should be provided by someone with expertise in both the process of coaching and the practices the service provider will implement. Because of the need for repeated on-site sessions, it can be very time intensive.

Tools & Resources

- [Coaching Practitioners of Children Who Are Deaf-Blind](#)
- Grisham-Brown et al., (2018). Improving Practices for Learners with Deaf-Blindness: A Consultation and Coaching Model. *Teaching Exceptional Children*, 50(5), 263-271 (if you don't have this journal, contact NCDB)

d. Use reminder systems (print, verbal, electronic)

Reminder systems involve the communication of simple messages, such as a "tip of the week," to help team members recall information and prompt them to use a specific technique, strategy, or practice.²⁰

e. Create an archive of information about the child

Work with the team to create an archive of information detailing what they have learned about the child's needs and how to meet them. Ways to archive information include print portfolios and private online sites. The team collaboration site that is part of the Distance Mentorship Project is an example of a private online archive.

Archived information may include:

- Assessment data
- Video clips
- Descriptions of how the child communicates (e.g., a communication dictionary, a completed Communication Matrix)
- Descriptions of routines
- The child's preferences
- Step-by-step instructions on how to implement specific practices or programs

Archives not only help current team members keep track of what they are learning but may help personnel who work with the child in the future.

Advice From Colleagues

It's so important to ensure that knowledge about a child is carried forward from year to year and to keep track of what does and does not work. Archived information can help team members who already work with a child keep track of what they have learned, and it helps new team members get up to speed quickly. They don't have to start from scratch.

A good archive can help ease transitions from teacher to teacher, grade to grade, school to school, and state to state.

Tools & Resources

- [The Communications Portfolio \(Perkins Webcast\)](#)

- [Transition Portfolios \(Perkins\)](#)

f. Identify early adopters

Early adopters are team members who are the quickest to make changes in their practice and learn new ways of working with a child. Identifying and learning from these individuals may help you determine how to better assist other team members.²⁰ For example, you can find out from early adopters which TA strategies were most helpful to them or ask them to share their experiences at team meetings.

Early adopters are also a good pool from which to recruit implementation champions.²⁰

IIP5. Employing Peer-to-Peer Strategies

Peer-to-peer TA is the use of a structured approach to share expertise among colleagues within a professional community.^{22, 27} It may consist of one-time events such as presentations, meetings, or hands-on site visits or take place in the context of an ongoing mentor/mentee relationship or community of practice.

Use of peer-to-peer strategies with service providers and families allows state deaf-blind projects to:

- Make the most of limited resources by expanding the avenues through which recipients can access TA
- Increase the ability of service providers and families to solve their own problems
- Situate learning in real contexts
- Give service providers the opportunity to benefit from the multiple perspectives of experienced colleagues

Peer-to-peer TA can be either directional or equal in nature:

- *Directional*: One party (an individual or group) is the recipient and the other is the provider, with the provider having a more highly developed set of skills
- *Equal*: Individuals with similar problems or goals and similar skill sets convene to seek solutions

a. Facilitate peer matches

Although, peer-to-peer TA refers to peers providing support to each other, it requires facilitation from the state deaf-blind project to foster relationships and assist with arrangements, including:³⁰

- Matching service providers or families to other service providers or families to help them solve a specific problem or for generalized support
- Providing logistical support (e.g., online or face-to-face meeting space, online work areas, webinar hosting)

Advice From Colleagues

Our project has successfully used a format where we bring together (online or face-to-face) teachers or other service providers from around the state to discuss a specific need they have related to a student. We use a case study format. All participants are asked to bring the same information (e.g., description of the problem, description of the student, possibly video clips). They present their information and offer each other ideas and support. Participants often follow up by sharing resources (e.g., lesson plans, assessment tools) after the meeting.

Tools & Resources

- [Tips for Organizing Peer Matches](#)

b. Facilitate mentoring

Mentoring, a specific type of peer matching, is a relationship-based process between colleagues in similar professional roles.²⁶ The mentor is a more experienced practitioner who provides guidance to the less experienced mentee.

Mentoring differs from coaching in that it is focused on the overall professional development of an individual rather than the performance of a discrete set of skills. The mentor offers advice to enhance the mentee's professional performance and development and serves as a role model and support person within a profession or professional network²⁶ (e.g., the deaf-blind network, a school, or a professional organization).

Tools & Resources

- [Mentoring Factsheet](#)
- [TSBVI Mentor Program](#)

c. Facilitate or arrange visits to other sites

Visiting a site where a similar implementation effort has occurred and been successful is a recommended strategy for promoting implementation.²⁰ For state deaf-blind projects, this might involve making arrangements for a team to visit another school or program that provides a good example of effective instruction for children who are deaf-blind. Having team members visit established programs with well-implemented practices allows them to see the practices in action. It also helps to build relationships among service providers who work with children who are deaf-blind.

Prepare by establishing goals for the visit (including a plan for how the knowledge gained will be used),²⁰ and select sites that have:

- Characteristics in common with the site where you are providing TA (e.g., classroom type, a child with deaf-blindness of similar age and abilities)
- Features that relate to what you are expecting the team to implement (e.g., use of specific instructional practices)

d. Encourage team members to participate in relevant communities of practice

Communities of practice can foster collaborative learning environments that help members improve their use of effective practices.²⁰ They are an extension of the peer matches described above in that they typically include more people and have an open-ended time frame. Like other types of peer-to-peer engagement, communities of practice provide opportunities (often via distance communication) for individuals with common interests and needs to learn from and offer support to each other.

Because these communities require a great deal of facilitation and maintenance, they aren't usually created by state deaf-blind projects for the purpose of child-specific TA. When relevant communities of practice do exist, however, they allow service providers and families to learn from each other, giving them access to TA beyond what a state deaf-blind project can provide.

Advice From Colleagues

The Network of Teachers Working with Deaf-Blind Students (NTDB) is a community of practice for educational team members who work with students with combined hearing and vision loss in New York state. It was established by the New York Deaf-Blind Collaborative in 2011 to bring together dedicated professionals to support ongoing skill development and share resources and ideas. Groups in four regions typically meet every 6-8 weeks to discuss relevant content that is self-identified by the respective members. NTDB provides a unique opportunity for peer-to-peer mentorship beyond the constraints of classroom and district settings.

Tools & Resources

- [Communities of Practice Factsheet](#)
- [Online Communities for Educators: Guidelines for Planning and Implementation](#)

FULL IMPLEMENTATION PHASE (FIP)

In the Full Implementation Phase, the targeted practices are being used with fidelity by team members. SISEP defines full implementation as the use of an intervention with fidelity and good outcomes by 50% or more of the intended practitioners or team members.¹ From a TA perspective, this is likely to be a time when you are conducting evaluations and either wrapping up the TA relationship or working with the team to decide whether additional or different (e.g., less or more intensive) TA is needed. This is also a good time to reflect on how you can apply what you learned from the specific TA case to future work.



FIP1. Wrapping Up

At the conclusion of a TA relationship, it's important to help the team and school/agency make plans to:

1. Sustain and share the knowledge and skills they have gained
2. Continue to evaluate and respond to the child's needs

a. Use evaluation data to assist the team in identifying strengths and needs

Evaluation data can be used for a variety of purposes at this stage, including to (a) determine if additional TA is needed, (b) guide recommendations for future professional development for team members, and (c) work with team members to identify new or continuing needs of the child and make plans to sustain progress made.

The type of evaluation conducted depends upon needs identified in your evaluation plan but may include:

- The fidelity and quality of your technical assistance³¹—either your own self-report or feedback from team members
- Service provider/family member knowledge and skill change¹²
- Fidelity of service provider/family member implementation of practices¹
- Child outcomes¹

b. Help the team organize information about the child that can be used moving forward

One difficulty many children who are deaf-blind face is adjusting to new teachers or other team members at the start of a new school year or when there are personnel changes.²⁸ Information about the child's vision, hearing, communication, preferences, learning style, response to interventions, and much more can be organized in a portfolio or online archive for use by both current and future service providers. Having a good archive of information:²¹

- Lessens the negative impact of frequent changes in teachers and other personnel
- Promotes consistency in routines between home and school

If the team has been archiving information all along as described in *Employing Skill Development Strategies*, this would be a good time to review it and update as necessary.

c. Share success!

Feelings of success provide motivation for sustaining the use of new skills and practices.¹

- Communicate accomplishments to everyone involved in the current effort (e.g., team members, administrators, family)
- Encourage team members to present what they have learned during professional development events in their schools or districts
- Invite team members you've worked with to present with you when you conduct subsequent training events for other teams
- Include examples of successful TA as part of your dissemination efforts to raise awareness of the important role of your deaf-blind project within the state

FIP2. Learning from Experience

A key activity during this phase is what one source refers to as "improving future applications" by retrospectively analyzing and reflecting on the strengths and weaknesses of the implementation process.⁴ For child-focused TA, this primarily involves identifying factors that enhanced or impeded the ability of team members to implement new practices with fidelity.

a. Review evaluation data

A review of evaluation data can shed light on a number of issues that inform TA processes and activities. Specifically, it can be useful for gathering information about:

- Strategies that were or were not successful
- Team characteristics that increased or hindered success
- School or district characteristics that increased or hindered success

b. Use knowledge gained to improve your project's TA processes

Knowledge gained from specific or multiple TA cases can be used to improve your project's future TA efforts.²⁰ Consider how you can use what was learned to:

- Improve your project’s overall TA capacity (e.g., upgraded processes or forms)
- Improve future intensive TA activities
- Generate ideas for universal or targeted TA (e.g., large-group training)

Advice From Colleagues

In our child-specific TA, we have seen a recurring need for service providers to gain a better understanding of how to assess sensory functioning and design learning experiences that match a child’s available sensory channels. To begin to address this need, we developed training on evaluating sensory function in kids who are deaf-blind that could be used with classroom teachers and OTs. It is designed to help them address sensory access issues together.

c. Consider implications for system interventions

Reflect on the implications of what was learned from child-focused TA for possible systemic TA activities.¹ Does it fit into a larger pattern of common needs in your state or a specific school district? If so, could these needs be addressed by systemic TA efforts? For example:

- Increased representation of the needs of children who are deaf-blind in state-level policy initiatives
- Infusing training about deaf-blindness into state-level professional development opportunities
- Promoting information sharing among teachers and other personnel who work with students who are deaf-blind in a district or state

d. Use knowledge gained to inform colleagues in other state deaf-blind projects

One of the deaf-blind project network’s greatest assets is the combined knowledge and expertise of its members. State project personnel can share insights, strategies, planning tools, evaluation tools, and forms via:

- The State Project Portal, a private group on the National Center on Deaf-Blindness website
- This TA Reference Guide (contribute to the “Advice from Colleagues” and “Tools & Resources” sections)

FACTSHEETS

The factsheets were developed by NCDB specifically for this guide. The PDF links can be found at the following webpage for easy reference:

<https://nationaldb.org/products/ta-reference-guide/factsheets>

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