

# Tips for Tracking Professional Development & Technical Assistance in State Public Health Actions' (1305) School Health Strategies

---

## Introduction

This document provides states with tips and recommendations on how to track professional development (PD) and technical assistance (TA) activities implemented under State Public Health Actions' (1305) School Health Strategies. Professional development and technical assistance are defined as follows:

*Professional development* is defined as a set of skill-building processes and activities designed to assist targeted groups of participants in mastering specific learning objectives. Such events are delivered in an adequate time span (at least 3 hours) and may include training, workshops, and online or distance learning courses about curriculum, instruction, school health strategies or other topics.

*Technical assistance* is defined as tailored guidance to meet the specific needs of a site or sites through collaborative communication between a subject matter expert and the site(s). Assistance takes into account, site-specific circumstances and culture and can be provided through phone, mail, email, internet or in-person meetings.

## Overview of School Health Strategies

State Public Health Actions (1305) calls on states to use PD and TA to facilitate the implementation of several basic and enhanced school health strategies (see Figure 1). Specifically, states are to use PD and TA to educate and inform staff in local education agencies (LEAs) about targeted school health strategies.

**Figure 1. State Public Health Actions (1305) Basic and Enhanced School Health Strategies Related to PD/TA**

<b>Basic</b>	Strategy #1: Promote the adoption of food/beverage guidelines/nutrition standards, including sodium
	Strategy #2: Promote the adoption of physical education/physical activity (PE/PA) in schools
<b>Enhanced</b>	Domain #2, Strategy #3: Create supportive nutrition environments in schools
	Domain #2, Strategy #6: Implement quality physical education and physical activity in K-12 schools
	Domain #4, Strategy #5: Implement policies, processes, and protocols in schools to meet the management and care needs of students with chronic conditions (e.g., asthma, food allergies, diabetes, and other chronic conditions related to activity, diet, and weight)

## Overview of School Health Performance Measures

To measure the performance of states implementing school health strategies, CDC identified specific short-term performance measures (PM). The PD and TA short-term PMs capture the reach of related activities in terms of the number of settings and individuals in the target population impacted by the

strategies implemented, specifically the number of LEAs that receive PD or TA and the number of students in those targeted LEAs receiving PD and TA.

## **Recommendations for Tracking School Health’s Professional Development and Technical Assistance**

To track PD and TA, states will need to develop or use existing systems. When feasible, states should use existing tracking systems to extract relevant data. In consultation with partners and their project officer, states should assess whether or not partners have existing systems to track PD or TA provided to LEAs, individual schools, or school administrators, teachers, and other staff. This may require establishing data sharing agreements with other organizations (e.g., State Department of Education, LEAs, or partner organizations) that deliver and/or track information about PD and TA in schools; are required by the state to report PD and TA hours; and/or have capabilities to generate reports from extant data systems like teacher certification records. States should use any leverage they have to encourage organizational partners to report or share data as a part of any agreement to provide or exchange funding and other resources.

When existing data sources to track PD and TA do not exist, states should work with their partners and their CDC project officer to design and implement systems, or systematic procedures for documenting PD and/or TA activities such as participation rosters, sign-in sheets, registration records, and TA logs. States should include language around PD and TA tracking requirements in their agreements with partners to outline the roles and responsibilities for PD and TA tracking when feasible.

### **Types of PD/TA Tracking Systems**

PD and TA tracking systems may range from basic paper/pencil systems using standard forms (e.g., training participant sign-in sheets, workshop registration forms, PD or TA logs) to more complex systems that are custom built or customizable commercial electronic or web-based data/information management and reporting systems (e.g., teacher certification/licensure electronic records). Various types of PD or TA tracking systems are appropriate to use as long as collected data allow states to report on required performance measures.

### **Core Data Elements for Tracking PD and TA**

At a basic level, the PD and TA tracking system should capture and output key information, or core data elements, related to the PD or TA provided, such as the 1) Name and location of the targeted LEAs; 2) Number of participants attending the PD event; 3) Number of participants receiving TA; and 4) Total number of students enrolled in each targeted LEA. All core data elements can be tracked through a PD or TA tracking system; however, states can access publicly available data (e.g., US Department of Education, National Center for Statistics, Institute of Education Sciences Common Core Data on school LEAs accessible online from <http://nces.ed.gov/ccd/districtsearch>) to obtain reliable data on the number of students from each LEA identified as having teachers or other staff participate in PD, or that received TA related to the school health strategies.

In addition to the recommended core data elements, states may decide to also track other relevant demographic information about LEAs and students. A brief list of core and optional data elements to track PD and TA is outlined in Tables 1 and 2. In addition, Figures 2 and 3 offer examples of simple PD and TA tracking spreadsheets.

**Table 1. School Health Professional Development Tracking Core and Optional Data Elements List**

<b>Professional Development Core and Optional Data Elements</b>	
Event Info	<ul style="list-style-type: none"> <li>✓ PD event title and date(s)</li> <li>✓ PD provider’s and/or presenter’s/facilitator’s name and organizational affiliation</li> <li>✓ PD Event (e.g., Nutrition, PE/PA, Clinical Community Linkages, Other)</li> <li>✓ Duration of the PD event (in number of hours)</li> <li>✓ PD/training learning objectives</li> <li>✓ PD/training provider follow-up actions</li> </ul>
Attendee Info	<ul style="list-style-type: none"> <li>✓ Name of attendee</li> <li>✓ District (LEA) and/or school affiliation of attendee</li> <li>✓ Total number of students in the LEA</li> <li>✓ Attendee’s email address and phone number</li> </ul>

**Table 2. School Health TA Tracking Core and Optional Data Elements List**

<b>Technical Assistance Core and Optional Data Elements</b>	
Event Info	<ul style="list-style-type: none"> <li>✓ TA provider’s name and organizational affiliation</li> <li>✓ Mode(s) (e.g., phone, email, in person, other) and date(s) of communication</li> <li>✓ Subject of TA (e.g., nutrition, physical activity, clinical community linkages, other)</li> <li>✓ Description of TA requested (i.e., policy, curriculum and instruction, assessment of student performance, reducing disparities among populations of youth at disproportionate risk, other)</li> <li>✓ TA provider follow-up actions</li> </ul>
Recipient Info	<ul style="list-style-type: none"> <li>✓ Name of recipient</li> <li>✓ District (LEA) and/or school affiliation of TA recipient</li> <li>✓ Total number of students in the LEA</li> <li>✓ TA recipient’s email address and phone number</li> <li>✓ TA recipient follow-up actions</li> </ul>

**Figure 2. State Example Professional Development Tracking Spreadsheets**

PD/ Training Date(s)	PD Title	PD Type (PA/Nut/Bo th)	PD/Training Learning Objectives	Training Length (hours)	PD/ Training Consultant	Consultant Agency/ Org	Participant Name	Participant District (LEA)	Participant School	Total SD Students	Participant Email	Participant Phone	Follow-Up Action by TA Consultant
<i>[Record the date that professional development /training was provided.]</i>	<i>[Record the title or name of the PD/ training event.]</i>	<i>[Record the subject(s) covered during the PD/training event.]</i>	<i>[Record the overarching learning objectives for the PD/training event.]</i>	<i>[Record the total number of hours that the PD/training event took place.]</i>	<i>[Record the name of the PD/training provider.]</i>	<i>[Record the name of the organization with which the PD/training provider is affiliated.]</i>	<i>[Record the name of the PD/training attendee.]</i>	<i>[Record the name of the LEA with which the PD/training attendee is associated.]</i>	<i>[Record the name of the school with which the PD/training attendee is associated (if applicable).]</i>	<i>[Record the number of all students attending a school in the LEA.]</i>	<i>[Record the PD/training attendee's email address.]</i>	<i>[Record the PD/training attendee's phone number.]</i>	<i>[Record follow-up action items to be followed by the PD/training provider.]</i>

**Figure 3. State Example Technical Assistance Tracking Spreadsheet**

TA Date	School Name	School District	Total LEA Students	Lead TA Consultant	Consultant Agency/ Org	Participant Name	Participant Phone	Participant Email	TA Type	TA Mode	Specific Assistance Requested	Follow-Up Action by TA Consultant	Follow-Up Action by TA Participant
<i>[Record the date that technical assistance was provided.]</i>	<i>[Record the name of the school with which the TA recipient is associated (if applicable).]</i>	<i>[Record the name of the LEA with which the TA recipient is associated.]</i>	<i>[Record the number of all students attending a school in the LEA]</i>	<i>[Record the name of the TA provider.]</i>	<i>[Record the name of the organization with which the TA provider is affiliated.]</i>	<i>[Record the name of the TA recipient.]</i>	<i>[Record the TA recipient's phone number.]</i>	<i>[Record the TA recipient's email address.]</i>	<i>[Record the subject(s) (e.g., nutrition, physical activity, clinical-community linkages of the TA request.)]</i>	<i>[Record the mode(s) of communication used to deliver TA.]</i>	<i>[Describe the nature of the technical assistance requested.]</i>	<i>[Record follow-up action items to be followed by the TA provider.]</i>	<i>[Record follow-up action items to be followed by the TA recipient.]</i>