

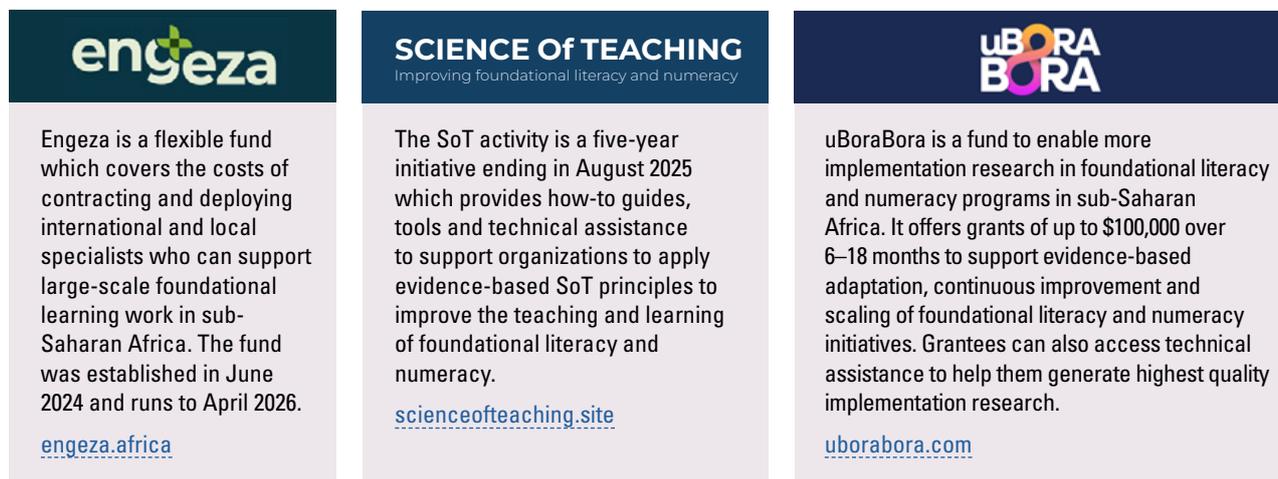
# Providing Effective, Quality Technical Assistance for Foundational Learning: A How-to Guide

## Overview

Technical assistance (TA), grounded in evidence about what works, plays a central role in driving improvements in foundational learning outcomes across sub-Saharan Africa and South Asia. Yet what constitutes effective TA—how it is designed, delivered, and contributes to sustainable improvements in education—remains an area for improved learning, especially in today's context, where resources for education are increasingly strained and investments need to offer value for money.

This how-to guide synthesizes insights from three Gates Foundation-funded programs that have TA as a core component of their programs: Science of Teaching (SoT), Engeza, and uBoraBora (see Figure 1). Each program—which is also a TA administrator—has implemented TA to improve foundational learning across diverse contexts in sub-Saharan Africa and South Asia and with varying models, yet all three share a core commitment to evidence-informed, contextualized approaches that build local capacity over the long-term.

**Figure 1. Gates Foundation-funded TA administrators**



This guide is designed as a practical tool for those funding, designing, and administering TA programs on foundational learning. It organizes TA delivery into three categories—pre-, during, and post-TA—and provides guiding principles for each category. The guiding principles reflect the learnings from SoT, Engeza, and uBoraBora and were derived from monitoring, evaluation, and learning (MEL) data from each administrator. This guide also contains an annex of “checklists” which correspond to the guiding principles around which this guide is organized. These checklists present guiding questions for the requestor and provider of TA to help them prepare for each stage of TA delivery (see Annex A).

There are a variety of actors involved in the TA process, and a number of terms are often used to describe them. For the sake of clarity throughout this guide—and recognizing that such terms and definitions are not set in stone and sometimes overlap—Figure 2 outlines who these key actors are.

Figure 2. Key actors involved in TA (as defined in this guide)

**TA administrator:** The entity managing and overseeing all parties involved in TA. The administrator may sometimes also serve as the provider of TA.

**TA requestor:** The person or organization who contacts the administrator to request TA (sometimes this is the same person as the TA client, but not always).

**TA provider:** The technical and/or contextual expert providing the TA directly to the client (often hired by the TA administrator).

**TA client:** The person or organization receiving the technical support, coaching, capacity building, etc. The TA client is sometimes the TA requestor.

**Client team:** The TA requestor + TA client (when separate entities).

**TA team:** The TA administrator + TA provider.

**Stakeholder:** Any additional groups, individuals, or organizations implicated in or benefitting from the TA activity.

While the future of how TA is administered is certainly changing, the guiding principles in this guide will remain not only relevant but critical to the delivery of quality, contextually relevant, and sustainable TA.

## Why TA?

In low- and middle-income countries, 70% of children are unable to read by age 10—a nearly 20% increase since before the COVID-19 pandemic and learning outcomes in math are equally sobering ([World Bank 2022](#); [World Bank et al, 2022](#)). TA is a key way to address this challenge, equipping stakeholders such as ministry staff and nongovernmental organizations with the skills, tools, and knowledge to strengthen foundational learning systems. While TA is necessarily context-specific, the learnings featured in this guide highlight common best practices in preparing for, delivering, and sustaining TA beyond its implementation.

## The Guiding Principles of Technical Assistance

### PRE-TA: PREPARING FOR TECHNICAL ASSISTANCE

Significant preparation is required to provide quality and timely TA with strong local engagement. Preparing for TA requires not only the right fit of technical expertise but strong project and relationship management skills and the opportune moment (within a program or initiative) of delivery. By addressing these guiding principles before TA begins, you can ensure that the TA ultimately delivered is efficient, impactful, and responsive to the needs of clients.

### 1. Establish clear roles, responsibilities, and expectations from the start.

#### A. Establish a clear goal for TA.

It is critical that the TA administrator be clear about what it hopes to achieve through TA and how TA fits within its overall theory of change. For example, uBoraBora TA was available only for the organization’s grantees, yet it was optional and on-demand; the goal of the TA assignment was to advance implementers’ (grantees’) research. Meanwhile, for SoT, the key purpose of TA was to strengthen capacity within organizations and governments in sub-Saharan Africa and South Asia to embed SoT-informed practices and policies in their respective contexts. An administrator’s goals for providing TA serve as internal guidance for how and why TA assignments are organized. With a common goal, the TA administrator and requestor can outline a specific assignment.



**Tip:** Regardless of the overall goal of TA, the specific TA assignment (i.e., task) should be linked to a foundational learning initiative that meets certain criteria (e.g., is linked to a large reform initiative for foundational learning, uses evidence-based approaches, is likely to have an impact on improving teaching and learning outcomes, etc.). In other words, the task for TA provision needs to be clear, detailed, and practical.

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4. Create a plan.

#### During TA: Managing the Provision of Technical Assistance

1. Sustain engagement.
2. Coordinate strategically.

#### Post-TA: Carrying the Work Forward

1. Safeguard sustainability.
2. Reinforce alignment.

**B. Provide a clear assignment and formalize it.**

The assignment for TA should provide as much detail as possible regarding the scope of work to be performed, the desired outputs or deliverables, check-in points along the way, any MEL data to be collected throughout the TA, and clear roles and responsibilities for each party involved, including who contributes in what capacity to each deliverable. The agreed-on scope of work can also inform a type of memorandum of understanding (MOU) signed by all parties to confirm a shared understanding of the work to be accomplished and that everyone accepts their assigned roles and responsibilities for the assignment. Engeza developed its own agreement form that was less formal than an MOU (see Table 1 on page 8 for Engeza’s “Ways of Working Together”).



**Red alert:** You don’t know what you don’t know! Before starting the TA, it can be difficult to know the extent of the challenges to be addressed by the TA. Therefore, there needs to be some level of flexibility built into the scope of work or MOU to accommodate this. For example, once the TA provider has been contracted and begins engaging more deeply with the client, it may transpire that the challenges were different than what was initially identified by the client. Plan for this.



**Example:** uBoraBora uses t-shirt sizing to estimate its TA assignments. This approach helps uBoraBora quickly categorize tasks as Small, Medium, Large, or Extra Large based on their relative complexity and effort, rather than trying to predict exact time commitments.

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**CASE STUDY**

**uBoraBora formalized TA assignments by working through four golden rules:**

*Is it ...*

1. **Feasible** – *Can we do it? We and the grantee can do it with reasonable resources. We don’t have a lot of dependencies. (Dependency = other things that need to happen; e.g., you can’t bake a cake without all the ingredients.)*
2. **Estimable** – *The task is clear enough to estimate time and resources needed.*
3. **Valuable** – *Is this worth doing? The grantee wants it and has requested it, and we think it makes sense too. Tasks might also emerge from a need we’ve spotted.*
4. **Testable** – *It will be clear when the task is done. What concrete change do we see as a result of the assignment?*



**C. Create accountability.**

It is critical to ensure that all actors involved are committed to the TA process. When the requestor of the TA is also the actual beneficiary (direct client) of the TA, their commitment to the process—their stake in it—usually goes without saying. However, in some cases, the TA is requested by one entity (such as a donor) but provided to another (such as a government); in such cases, it is critical to ensure that the direct client has a stake in it. This could mean asking them to dedicate resources (e.g., time from key people, paying for workshops, data collection, or other aspects of the larger initiative the TA might be supporting), commit to certain deliverables (e.g., timely review), share documents, and so forth. Ensuring that the client shares responsibility and accountability for the TA’s success is critical to the uptake of recommendations from TA, while no such buy-in could derail the activity. When the requestor and the client are different entities, drafting an MOU or similar document that outlines the roles, responsibilities, and expectations of each party is even more critical.



**Red alert:** As the TA administrator, think about your management costs to oversee the TA.

While there are management costs associated with the set-up of TA, there will be unforeseen challenges to work through and pivots to make (see red alert above) and this will all take time and budget from the administrator to lead the team to success.



**CASE STUDY**

**Strong Government Engagement Enables Timely TA Delivery | Namibia**

In Namibia, the Ministry of Education, Innovation, Youth, Sports and Culture requested Engeza’s support to develop a comprehensive roadmap for improving mathematics outcomes in junior primary (pre-K to grade 3). This roadmap aimed to translate the government’s commitment to foundational learning—enshrined in a cabinet-approved national development plan—into concrete action. The urgency of fulfilling this commitment drove strong collaboration between government officials and the TA team. Key personnel, within the Ministry, actively supported a rapid yet comprehensive needs assessment, enabling the TA team to deliver on its objectives within the agreed time frame. The government expressed high satisfaction with both the roadmap and its potential to guide sustained improvements in early numeracy outcomes for Namibian learners.



**2. Understand your client and their context.**

**A. Understand the client team’s capacity.**

Every TA assignment has a finite budget and a tight timeline. Therefore, it is important to ensure that the TA meets the client in their current capacity. This will help guarantee that all effort goes into uncovering new critical knowledge to place the client/requestor in the best position to effectively engage with, and benefit from the TA. **Think: What would it take for the client team to thrive and work with TA effectively?** In other words, what is the missing piece that would enable success? The missing piece might include expertise or knowledge (e.g., data skills, subject-matter insight), tools or technology, time and space for collaboration.

Even the most capable team will be unsuccessful if they are overstretched. This is why it is critical not only to understand the technical capacity of a team but to understand their bandwidth for the TA—i.e., how a team operates, their time management, their interpersonal dynamics, etc. The administrator should take note of the number of people on the client/requestor team and how stretched they are, taking note of the skill sets currently available; competing responsibilities and priorities; organizational support (or lack thereof); and energy, morale, and momentum. This makes the assignment more pragmatic and helps you plan the TA within realistic limits.

**B. Understand the client team’s needs.**

Conducting a thorough needs assessment before starting TA helps ensure alignment with the client’s priorities and a comprehensive understanding of the client’s capacity to engage with the TA. Reviewing the appropriateness of tools and resources with partners at the start allows for effective tailoring to specific contexts.



**Tip:** It can be helpful to break the TA itself into two phases: (1) a needs assessment component and (2) work that is based on that needs assessment.

Some assignments may require a more in-depth needs assessment to inform the TA plan and identify the appropriate TA providers. For example, experience has shown that revising or developing teaching and learning materials is best divided into two phases: In the first phase, the TA provider reviews existing materials and identifies the extent of revisions and level of effort needed, time frame, and number and profile of people

needed. The information can then be used to appropriately design the second phase of TA, during which materials revisions and any other related work (e.g., orthography standardization, updates to the scope and sequence, and illustration and graphic design work) can take place.

**C. Understand the initiative, context, and ecosystem.**

TA is usually provided within the context of broader program implementation and is often linked to an even larger foundational learning initiative at the national level. This ecosystem includes other funders, perhaps other

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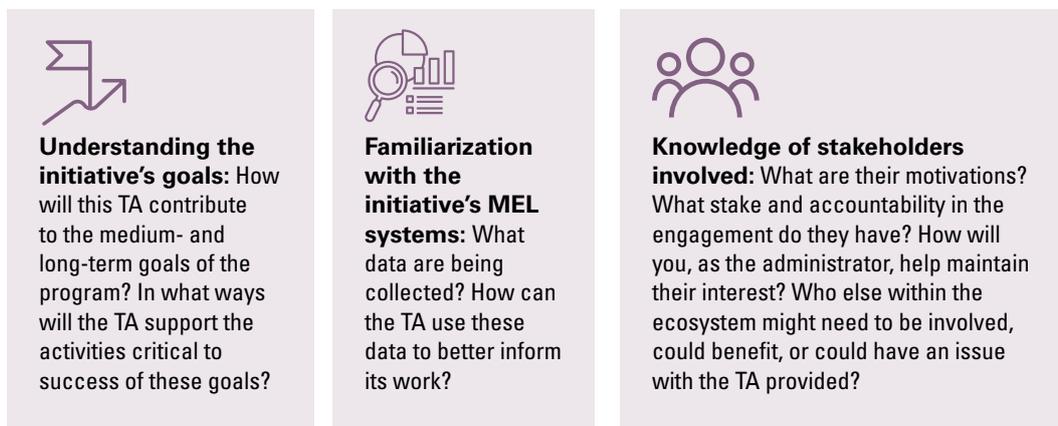
**Red alert:** A client team’s bandwidth can affect the TA budget. If a team is overstretched and misses deadlines, or is unable to complete work, this falls on the TA administrator to troubleshoot. Similarly, if the technical capacity of a client is not well understood from the outset, this could lead to a misalignment of the TA provided, which also has cost implications.

providers of TA, and maybe similar stakeholders. **Consider: Does this initiative complement or duplicate existing efforts? Will it be competing with other stakeholders or priorities?**

While the TA might represent a small fraction of the overall work being conducted as part of a wider initiative, it is no less critical than other aspects of the program. In fact, the TA might be just the precise support needed to make the overall program a success. In order for assistance to be effective in the context it is supporting, both the TA administrator and the TA provider must be well-versed in (1) the education context; (2) any national education priorities or foundational learning agendas or reforms; and (3) the initiative under which the TA is being provided.

The timing of TA is key. Timing TA engagements to align with ministry implementation cycles, external evaluations, and capacity constraints enhances effectiveness. Avoiding periods of limited availability (e.g., summer holidays, office closures) and ensuring TA providers' availability

**Figure 3. Understanding the initiative goes beyond having read the initiative or program description. It requires:**



during key milestones can prevent disruptions. This requires thorough up-front planning—including timeline alignment with program cycles and key events—to prevent delays and inefficiencies.

### 3. Engage stakeholders and TA providers early.

#### A. Involve all stakeholders before TA begins.

Whether organizations or governments directly request TA, or the request originates with a funding partner, their involvement will determine if and how the work is carried forward beyond the period of TA. This requires the government and any relevant stakeholders to be fully invested in the TA's work, meaning that (1) they collaborate (e.g., collaborate in revising teaching and learning materials, paying for their printing, and training teachers to use them; or collaborate in making time for meetings, providing feedback, co-creating products, facilitating necessary approvals, etc.) and (2) apply the “products” of the TA assignment and continue to use them following the TA period. Ensuring that they and any other relevant stakeholders are involved from the start is critical to garnering this collaboration. This involvement should also include a plan for sustainability in terms of stakeholders who might be responsible for carrying out the work the TA supports or designs, as well as funds for it to be continued.

Early involvement of donors and in-country partners (e.g., World Bank, UNICEF, Global Partnership for Education) is also important because it ensures alignment, increases buy-in, and facilitates potential follow-up support. Importantly, the strategic engagement of these decision-makers in workshops maximizes the impact of TA efforts.



**Red alert:** It is important to build in extra time when planning with governments. Often, governments are the clients of TA but are not the ones who have requested it. For this reason, it is crucial to engage government stakeholders early, secure their buy-in, and leave buffers in the timeline to account for unforeseen delays.

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**CASE STUDY**

**World Bank & Ministry of Basic and Secondary Education |The Gambia**

This TA involved (1) the development of a new language-of-instruction policy and (2) the planning and delivery of a structured pedagogy “study tour” to Ghana.

Early engagement of key decision-makers was critical to success and ensured that stakeholders were accountable, driving both commitment and sustained impact. A needs assessment and alignment with existing initiatives helped build trust and relevance, enabling the ministry to take ownership and allocate key personnel, time, and resources to this TA.



**B. Choose the right TA team.**

TA has developed a reputation of flying in consultants from the Global North to support local stakeholders in the Global South (i.e., “the fly-in, fly-out” model). When experts from the Global North are “flown in,” this undermines confidence in local talent and can weaken the sustainability of the initiative. There are many talented foundational

learning experts in low- and middle-income countries, and so the preference for choosing a consultant to provide the TA should be on the person’s country-specific experience together with their technical expertise, and in-country experts should be used when possible. TA assignments often need a very specific kind of expertise, and it is important to be explicit about the expertise required (see red alert above).



**Red alert:** Expertise is not interchangeable. Whether the TA is needed to support the development of teaching and learning materials, a needs assessment, or an evaluation of a foundational learning initiative, most TA requires a team of people with complementary skills to be effective. In addition to skills in a specific technical area (e.g., reading or math pedagogy, book procurement, evaluation design and data analysis), other critical skills include language skills, country experience, and specialized experience within a given technical area (e.g., sampling expertise, math assessment, etc.).

Only if there is a dearth of local technical expertise should an “international expert” (i.e., someone from a country other than the one where the TA is being performed, but not necessarily a country of the Global North) be considered (see red alert to the left). If an international consultant is selected because of their technical expertise, they should be paired with an in-country counterpart to ensure that knowledge of the local context (i.e., creating a team with complementary skill sets) is sufficiently embedded in the TA.



**Red alert:** It is essential that the sector continue to work on building up the pipeline of local expertise so that they can be the experts providing TA in the future. This means that when there is a dearth of local technical expertise for a given assignment, the TA initiative is intentional about pairing local consultants with the technical experts who can mentor them.

Engaging an in-country consultant from the start, alongside international consultants, if and where appropriate, ensures a shared understanding of

decision-making processes and enhances contextual relevance.

The composition of personnel of the TA administrator is also critical to choosing the right the team. While the administration team should comprise staff with strong project management skills, there should also be a technical lead on this team. Such a person should have enough technical knowledge to be able to have the initial scoping conversations with the requestor of TA, determine the technical skills needed to deliver the TA assignment and meet the client’s needs, and to support the selection and onboarding of the TA provider (i.e. to assess whether the selected provider has the requisite skills and expertise). In essence, the TA administrator must also be a three-legged stool (see Tip box) in and of itself.



**Tip: Make your 3-legged stool: expertise, planning, and management**

Putting together the right TA team is like building a stool with three legs—if any one leg isn’t as strong as the other, the stool is unstable. If there is good management and expertise but poor planning, TA will not run smoothly. Or if there is effective management and planning, but the expertise isn’t right, TA will not be effective. Finally, if there is strong expertise and planning, but the TA is poorly managed, it won’t work.

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**CASE STUDY**

**Bringing Together the “Right” TA Team in Nigeria**

For a TA assignment in Nigeria, Engeza brought together a team of five experts to develop a teaching and learning material (TLM) review tool for math and reading and to facilitate a review of TLMs in math, English, and three Nigerian national languages. The TA provider team included individuals from Nigeria, Kenya, and the United States with expertise in foundational literacy and numeracy TLMs. The team collaborated remotely, with three of the five team members participating in in-person workshops in Nigeria. Although the overall TA time frame was relatively short, the five-person team was necessary given people’s availability during the implementation period, as well as the need for people with diverse experience across multiple subjects. The team’s quick mobilization to implement the work was further supported by some members’ previous experience working with one another and strong technical management from the TA administrator, the client, and the TA providers.



Finally, putting together a team requires consideration of other factors such as the complexity of the assignment, the amount of work to be conducted, and the timeline. The longer the timeline, the larger the team will likely need to be in order to complete the work, for many reasons. For example, if work takes place over an extended period of time, people may need to support one another during times when one team member is not available. For such TA, it can be useful to engage a team of multiple individuals, or an organization with several personnel (with diverse skill sets, with overlapping skills, and of various levels—senior and junior). While a larger team may initially appear more costly than hiring one or two consultants, experience has shown that appropriately staffing the TA assignment will result in higher-quality TA, help avoid delays, and be more cost-effective in the long run.

**4. Create a plan.**

**A. Establish clear measures of success.**

From the outset, the TA team should define its indicators for success so that progress can be tracked effectively. These indicators should be measurable and include both process and performance. Process indicators help the team determine if and what progress has been made and if the work is on schedule; these indicators should be reviewed at predetermined intervals throughout the TA assignment. Performance indicators signify what the TA has achieved and contributed to.



**CASE STUDY**

**uBoraBora’s “Pre-mortem Tool”**

uBoraBora uses a “pre-mortem” tool before TA begins. Typically, teams use a “post-mortem” approach, asking “How did it go?” or “What could we have done better?” at the end of a project. By contrast, a pre-mortem approach considers these issues ahead of time. Thinking about the future and what challenges might arise can help surface opportunities and risks that could make or break the work.

uBoraBora also builds in mid-sprint reviews so that there exists a point where the entire TA team can reflect not just on the work but also on their working relationship with one another and how they could improve their ways of operating as a team. See Annex B for a template of uBoraBora’s pre-mortem tool.

**B. Establish ways of working.**

Make a workplan. A great deal of success for the provision of TA boils down to effective project management (within a solid team; see tip in 3B). The MOU (or similar agreement) discussed in point 1B represents the first step in establishing how the team will operate because it delineates the scope of work, objectives, and roles and responsibilities of each party involved. However, no document is more effective than a workplan at articulating the necessary steps and timeline needed to accomplish an objective.



**Red alert:** The workplan should be a standalone document and not just part of the terms of reference or MOU.



**Tip: Conditions for TA success**

1. Sufficient lead-time exists for assignment planning and preparation before the work begins.
2. The assignment is “implementation ready.” In other words, the objectives, activities, and outcomes are clear.
3. Plans and funds exist for TA assignment-related activities (e.g., workshops, data collection).
4. Client has identified a point person on its team to work with the TA administrator to supervise the TA provider and manage the assignment.
5. All partners are on board and committed to collaborating with the TA provider and one another.

The TA administrator should propose regular check-ins with different team members, as well as regular group check-ins (with the TA provider, requestor, and client). Prepare an agenda in advance of each check-in and share it with the team for feedback. This will help ensure that everyone is prepared for the meeting and maintains a set of shared expectations for the goal of the meeting. It is also helpful to create a single, main communication channel to streamline coordination, prevent misalignment, and ensure that all relevant stakeholders remain engaged throughout the TA process. Engeza provides all actors involved in its TA team a document titled “Ways of Working Together.” The purpose is to ensure that all members of the assignment team are aware of and agree to specific “ways of working.” It specifies stakeholders’ roles and responsibilities

and how they will work together and is reviewed and signed off by the relevant authority for each stakeholder group as applicable (e.g., requestor, TA providers, client). Table 1 below summarizes the content from this document.

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**Table 1. Summary of “Ways of Working Together” document**

Administration, Management & Communications			
	TA Administrator	Client/TA Requestor	Technical Assistance Provider
	<ul style="list-style-type: none"> <li>• Contract TA providers in accordance with organizational policies.</li> <li>• Convene kick-off meeting with TA and client.</li> <li>• Provide administrative and logistical support to TA with respect to onboarding, travel and hotel arrangements (in coordination with [list other stakeholders]), and payment for services rendered in alignment with the agreed-upon TOR.</li> <li>• Manage assignment budget and provide updates to client and TA providers as needed.</li> <li>• As needed, facilitate communication and collaboration between/among TA providers and client to support successful completion of the work; respond to communications from client and TA provider in a timely manner.</li> <li>• Organize meetings to facilitate collaboration and address any concerns or issues that arise during implementation (If a difference of opinion arises between any members of the assignment team regarding any aspect of the work, the TA administrator will help to broker a solution).</li> <li>• Provide assignment updates to the other stakeholders if relevant.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide overall direction and supervision for the assignment and the TA provider’s work.</li> <li>• Organize TA provider’s in-person activities, including any meetings or workshops that need to be organized to allow the TA provider to conduct the activities and complete the deliverables in the agreed-upon TOR. Pay for any expenses associated with the meetings or workshops.</li> <li>• Attend planning and check-in meetings with TA administrator and TA provider, as needed.</li> <li>• Provide updates as needed regarding any issues that may affect the TA provider’s ability to conduct and complete the work as planned.</li> <li>• Provide guidance on appropriate protocols TA provider should follow with respect to any interactions with government officials and visits to schools. Facilitate introductions to government stakeholders.</li> <li>• Facilitate communication and collaboration between/among TA provider and other stakeholders to support successful completion of the work. Respond to communications from TA administrator and TA provider in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>• Adhere to terms of reference and contractual agreement.</li> <li>• Respond to communications from Engeza and client in a timely manner.</li> <li>• Attend planning and check-in meetings, as needed.</li> <li>• Adhere to client’s and TA administrator’s guidance, policies and protocols regarding safety and security, travel, accommodations and in-person visits to schools as agreed upon.</li> </ul>
Technical Work			
	TA Administrator	Client/TA Requestor	Technical Assistance Provider
	<ul style="list-style-type: none"> <li>• Verify TA has been conducted in accordance with TOR.</li> <li>• Provide limited technical support if needed and requested.</li> </ul>	<ul style="list-style-type: none"> <li>• Serve as the main point of contact for TA provider with respect to assignment tasks and deliverables.</li> <li>• Provide overall technical direction on activities and deliverables, as described in the TA TOR.</li> <li>• Review TA deliverables and provide feedback in a timely manner, so as not to jeopardize TA’s ability to complete the work in accordance with the TOR timeline.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide technical assistance as described in the TOR.</li> <li>• Collaborate with other TA providers, client, government and other stakeholders to carry out the work in an agreed-upon manner.</li> <li>• Submit technical deliverables to client/TA requestor/ relevant counterparts for approval. If a deliverable does not meet agreed-upon standards, client and TA administrator will provide concrete feedback to the TA and will agree upon changes to be made.</li> </ul>

Table 1 (continued). Summary of “Ways of Working Together” document

Reporting, Accountability & Invoicing			
	TA Administrator	Client/TA Requestor	Technical Assistance Provider
	<ul style="list-style-type: none"> <li>Provide client and TA provider with required monitoring and evaluation forms/report templates/guidance and verify that required reporting is submitted; review reports and take follow-up action as appropriate.</li> <li>Process TA provider invoices and payments in a timely manner, as agreed upon in contract.</li> </ul>	<ul style="list-style-type: none"> <li>Complete required monitoring and evaluation forms/report templates/guidance.</li> <li>Communicate via monthly reporting, email and/or during period check-in meetings any challenges or issues that might affect the TA provider’s scope of work, ability to complete deliverables as indicated in the TOR, client’s ability to provide agreed-upon support/organize activities that involve the TA provider, and successful and timely completion of the TA assignment in general.</li> <li>As noted above, review deliverables and provide final sign-off.</li> </ul>	<ul style="list-style-type: none"> <li>Complete required monitoring and evaluation forms/reports.</li> <li>Provide additional assignment updates to the client and TA administrator as needed; this includes any changes in timeline, budget and deliverables, and any challenges or issues that might affect the successful and timely completion of the TA assignment.</li> <li>Submit deliverables to the client and TA provider as indicated in their terms of reference.</li> <li>Adhere to Engeza invoicing timeline and requirements. <i>NB: client must approve all deliverables in writing before TA administrator can approve and process TA invoice.</i></li> </ul>

Relationship building is another important aspect of priming the team to work well together. Establishing a working climate that is psychologically safe for all parties involved is essential to facilitating honest and open discussions and fostering environments where the team feels and can perform their best. See the tips below on how to create a psychologically safe working environment.



**Example:** To support the effective design, implementation, and management of its TA assignments, Engeza developed a detailed guide for its staff outlining tasks to conduct at each step in the process. The guide includes descriptions of each step and who is responsible, example communications, links to templates and forms, and other useful tips. This internal tool supports consistency in assignment development and implementation, while providing staff with the support they need to efficiently carry out their duties.



**Tips** for creating working environments that are psychologically safe for all team members:

- Model vulnerability and humility from the beginning.
- Ask, explicitly, for input from quieter team members.
- Co-create ground rules for collaboration.
- Normalize disagreement.
- Regularly ask questions like: How are you feeling? What do you need?

The Guiding Principles of Technical Assistance

**Pre-TA:** Preparing for Technical Assistance

1. Establish clear roles, responsibilities, and expectations from the start.
2. Understand your client and their context.
3. Engage stakeholders and TA providers early.

**4. Create a plan.**

**During TA:** Managing the Provision of Technical Assistance

1. Sustain engagement.
2. Coordinate strategically.

**Post-TA:** Carrying the Work Forward

1. Safeguard sustainability.
2. Reinforce alignment.

**DURING TA: MANAGING THE PROVISION OF TECHNICAL ASSISTANCE**

Now that you have a clear and formalized TA assignment, roles and responsibilities for all stakeholders involved, and a coordinated plan for operating, you are ready for the TA assignment to begin. By implementing these strategies during the provision of TA, you can ensure that the support is effectively managed, contextually relevant, and better aligned with TA client/requestor needs.

**1. Sustain engagement.**

**A. Make in-person support a priority.**

TA can maximize its impact through in-person support. A sustained, in-country presence or regular in-person interactions allow for greater collaboration and provide opportunities for co-creation and learning on both sides. **TA is a process of mutual learning and mentorship.** While the TA provider is hired to train and build capacity on a particular technical aspect of foundational learning, the TA requestor and client both have contextual experience to share that is critical to enhancing the effectiveness of the TA. If the TA provider sets an intention to learn, they will find that their technical expertise is sharpened by the knowledge their in-country counterparts have to share.



**Tip:** Managing power dynamics in both virtual and in-person workshops can be challenging. Especially if the consultant/team providing TA is from the Global North, it is important to express humility and recognize you are not an expert of the context.

For example, we might say something like: “As researchers based in the Global North, we recognize that our perspectives and experiences are shaped by our cultural, academic, and institutional contexts, which differ significantly from ...”



**Tip:** As discussed earlier (“Pre-TA” 3B), the ideal TA provider is an in-country expert. However, in cases where this is not possible and the TA provider is an international (i.e., non-local) expert, be sure to budget for at least one trip (if not more) for the TA provider to work in person with the TA requestor/client.

Workshops are a common activity during TA, and the post-COVID world has mastered the art of hosting them virtually. However, virtual workshops can never replace an in-person setting. Workshops are most effective when conducted face to face, as they minimize technical issues, improve engagement, and allow for interactive facilitation. Sessions should focus not only on learning but also on implementation, where participants co-

create plans for next steps. The case studies from SoT in the box below illustrate how in-person support was critical to TA delivery.



**CASE STUDY**

**Sustaining Engagement on SoT**



**Kenya | GRiC – teaching and learning materials development:** In-person support from local consultants (such as the planning and delivering of in-person workshops on how to develop teaching and learning materials) proved highly effective during this TA, leading to deeper stakeholder engagement and real-time feedback that enhanced learning and led to high-quality materials.



**Sierra Leone | Ministry of Basic and Senior Secondary Education – foundational learning roadmap:** A hybrid model that consisted of remote support with some strategic in-person missions—such as attendance at a kick-off retreat—helped the consultant build trust, drive engagement, and strengthen ministry ownership of the foundational learning roadmap. A sustained, in-country presence would have been even more beneficial.



**Burkina Faso | World Bank & Ministry of National Education, Literacy and Promotion of National Languages – curriculum development:** Due to security constraints in the country, only remote support was possible, which reduced opportunities for meaningful collaboration. Long virtual workshops were also difficult given the technical IT challenges. It is important to consider how to overcome such barriers and try to find solutions to reach fragile contexts that often need the most hands-on assistance.

**B. Set up mechanisms that encourage continuous learning.**

TA should emphasize enabling clients to develop their own solutions. Coaching, ongoing thought partnership, and iterative feedback loops help a client take learnings from the TA exercise and apply them to their own thinking and ideas. However, for these learning mechanisms to be effective, they must be established and agreed on from the outset within an environment that is psychologically safe, respectful, and mutually enriching (see tip in “Pre-TA” 4B). Hubris can sabotage the potential of these continuous learning opportunities. To foster such an environment, the TA administrator and the TA provider can:

- Model vulnerability and signal when they too need help.
- Regularly communicate the boundaries of their own knowledge.
- Be intentional about bringing in other voices and soliciting multiple points of view.
- Ask explicit questions to understand clients’ underlying concerns or unmet needs. For example: What is the one thing that is keeping you up at night? What would you solve tomorrow if you could? What is something you wish you knew or could do?

There are also contractual mechanisms that the TA administrator can put in place that allow for more room to learn and adjust (see red alert in “Pre-TA” 1B). Milestones can be flexible (if appropriate), which empowers the TA team to set and move deadlines based on their needs (though this should be approached with some caution

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to ensure that deadlines are not constantly being pushed back and the work delayed). Milestones can also include reflection calls that are focused just as much on learning—where failure and setbacks are welcomed and surfaced—as they are on outcomes. Sometimes, challenges are internal. The TA administrator can act as a neutral facilitator, ensuring that all perspectives are heard and helping teams move forward.



**Tip:** Consider how to position yourself as a continuous thought partner. The work is hard and roadblocks are inevitable. What mechanisms can you set up so that the TA requestor/client feels comfortable approaching you and saying, “Help, I’m embarrassed to say this but ...”?

## 2. Coordinate strategically.

Many clients receive multiple streams of TA support, which means that the TA administrator must coordinate across multiple initiatives. Funding for TA might come from different donors, each with their own priorities and agendas. Sometimes, multiple and simultaneous mechanisms of support can derail TA because there are competing demands on the client’s attention. This is why it is so important to take time to understand the ecosystem in which the TA will operate (“Pre-TA” 2C). Will the TA initiative add noise to the sector? Is this TA competing for the same stakeholders?



**Tip:** A structured roadmap with corresponding resources and templates can improve coherence across various TA efforts.

Coordinating across multiple TA initiatives requires advanced planning, organized project management, and good communication. If the TA you are managing is entering an ecosystem where multiple TA initiatives are already taking place, set up meetings with members of those TA teams (the administrator, requestor, client, and provider) to understand their TA goals,

the activities they have planned and when, and which stakeholders are involved, and to discuss if there are areas where your respective TA initiatives can support one another. Use this opportunity to clarify reporting lines and consolidate communication channels to avoid fragmentation and support sustainable impact. Regularly reviewing timelines and holding routine check-ins will prepare the TA team to evolve flexibly to challenges.

In addition to regular check-ins with the TA team, it is important to set up a check-in with the requestor/client midway through the TA process to make sure that the work delivered still meets their needs and is still relevant and that the established ways of working together remain effective.

Effective coordination throughout the duration of TA can also require aligning any new terms of reference to the current TA assignment. It is important to ensure that any subsequent terms of reference for follow-up support align with best practice, build on existing TA, and strengthen the sustainability of TA efforts. Advising the next TA team on partner selection can provide technical continuity and help support this alignment of efforts.



**Red alert:** The task of coordinating across multiple TA mechanisms often falls inadvertently to the TA provider because this person or team is more involved in liaising with stakeholders in the delivery of TA. If it makes sense to delegate this coordination task to the TA provider, make it clear what they are responsible for and allocate additional level of effort for them to provide this support.

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## POST-TA: CARRYING THE WORK FORWARD

Must all good things come to an end? This certainly does not hold true for TA. If pre-TA is approached with careful attention to detail and intentional planning, and the TA process is well-coordinated with ample opportunities to learn and course-correct, the impact of the TA is sustained. By focusing on the post-TA actions outlined below, organizations can maximize the impact of TA efforts, sustain momentum, and build more resilient education systems.

## 1. Safeguard sustainability.

### A. Revisit the sustainability plan.

While the sustainability of TA really begins in the pre-TA phase (3A), efforts to support the client’s ability to maintain the improved learning or capacity from TA should be reinforced throughout the TA assignment and even after it concludes. The TA administrator should periodically review the sustainability plan (developed in the pre-TA phase) to verify that it is still viable, that the client is in a position to take over the work (if relevant), that the appropriate stakeholders remain engaged and committed to it, and that, if needed, there are additional available funds for it to be continued. These contingencies re-emphasize the importance of securing buy-in and understanding the context and ecosystem during the pre-TA phase (“Pre-TA” 1C and 2C), as well as sustaining engagement—specifically in-person engagement—and coordinating strategically across TA mechanisms and stakeholders during TA (“During TA” 1A and 2A). Revisit the sustainability plan as TA ends and check in with the client and relevant stakeholders after the TA assignment concludes to ensure that they have the expertise and independence to carry TA recommendations forward.



**Tip:** Ensure that all resources used during TA are available after the fact. Developing a centralized online repository with context-specific learning materials, coupled with physical copies to address connectivity issues, ensures broader access.

### B. Maintain momentum through structured follow-up.

Post-TA check-ins (for example, six months after TA has ended) will help track implementation progress and identify ongoing support needs. Clear accountability lines and structured implementation plans—which were prepared during the pre-TA phase (4B) are essential to prevent the loss of momentum. Conducting follow-up workshops is a great way to allow stakeholders to refine outputs, reflect on learnings, and train additional partners who were unable to participate earlier. This enhances local capacity and reduces long-term dependency on TA support.



#### Example: SoT’s Follow-Up Questions 6 Months Post-TA

1. Now that some time has passed, could you provide some overall reflections on the technical assistance that your organization received ~6 months ago?
2. In what ways has the technical assistance process affected your organization’s knowledge or understanding of SoT principles and topics?
3. Could you describe any tools, research, or resources that have been developed by your organization or key stakeholders following the TA you received?
4. Overall, what do you think was the biggest value-add of the TA you received?

## 2. Reinforce alignment.

### A. Support system-level change and policy alignment.

Sustaining TA efforts requires engagement beyond a few individuals. Often, it requires systemic policy shifts and curriculum adjustments to encourage the long-term adoption of best practices. If the TA team engaged stakeholders early (“Pre-TA” 3A) and explicitly sustained engagement with them throughout TA (“During TA” 1A and 1B), there is a greater chance of pushing necessary reforms forward.



**Example:** STiR included local Ugandan stakeholders in all stages of the TA process. Before TA began, STiR supported the Ministry of Education and Sports (MoES) to host a co-design session for the local TA provider, central and district MoES officials, and teachers, during which they reviewed pedagogical areas for growth (from SoT resources) to select which seemed most relevant and useful for their teacher learning improvement cycle (LIC)—a professional development exercise in which teachers participate multiple times a year. STiR—with support of the MoES—then delivered a teacher needs analysis survey to all primary teachers in the districts they served. This survey listed the pedagogical priorities (as agreed during consultation during the co-design session) to inform the focus of the LICs. Teachers selected assessment-informed instruction as the most important pedagogical area for growth to prioritize. STiR then created materials for the next LIC with support of the TA provider and input from the MoES. Because the co-design stage was highly collaborative with input from and consultations with local stakeholders, the MoES remained engaged throughout the TA process and final dissemination event. Engaging government stakeholders was a key entry point for learnings from the TA to be embedded at the system level to help improve teachers’ understanding and application of assessment-informed instruction in teacher training and classroom practices.

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**B. Facilitate stakeholder collaboration and further opportunities.**

Do not disappear once TA ends. Re-engage target stakeholders after the assignment is formally finished (as well as throughout TA) to ensure that outputs are embedded within the education system. This might mean exploring the possibility of including a small amount of funding to enable a help-line style model of ongoing support in future TA mechanisms, such as light-touch coaching and technical assistance for understaffed ministries or overstretched stakeholders. A helpline-style model could provide on-demand guidance where needed. Identifying opportunities for further collaboration with ministries, curriculum bodies, and non-governmental organizations will maximize impact. Really, this should be done throughout TA so that the exercise is connected to ongoing efforts and thus more likely to be sustained.

Many organizations face funding limitations for scaling efforts. Supporting fundraising strategies, identifying high-value areas for future TA involvement, and collaborating on resource mobilization can enhance long-term sustainability as well.

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## Conclusion

**Successful TA begins when preparing for TA, before the assignment itself begins.** While TA, of course, requires sound technical expertise and the right fit for context, successful TA really boils down to a focus on several guiding principles that begin before TA, are sustained during TA, and are revisited after TA: the explicit and sustained engagement of government counterparts and other stakeholders; creating a plan (for TA and sustainability) and maintaining organized communication and management around that plan; developing good relationships within the ecosystem of operation; and ensuring the alignment of time, personnel, and resources. By addressing these guiding principles, TA administrators can make the TA process more efficient, impactful, and responsive to the needs of the education system. Importantly, the “fruits” of the TA will have an ecosystem in which to grow.

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## ANNEX A: CHECKLIST FOR PROVIDERS AND REQUESTORS OF TA

### Pre-TA: Preparing for Technical Assistance

Checklist for TA requestors (when requestors are also recipients of TA)	Checklist for TA requestors (when requestors are NOT recipients of TA)	Checklist for TA providers
<ul style="list-style-type: none"> <li><input type="checkbox"/> Is the TA request aligned with your organization's/system's broader goals for foundational learning?</li> <li><input type="checkbox"/> Have you clearly defined what you want to achieve through the TA?</li> <li><input type="checkbox"/> Has this been clearly communicated to the TA provider?</li> <li><input type="checkbox"/> Do you understand the scope of work—what will happen, by whom, and when?</li> <li><input type="checkbox"/> Have you ensured that the timing of TA fits well with your team's calendar and avoids periods of low availability (e.g., holidays)?</li> <li><input type="checkbox"/> Have you agreed on your team's responsibilities (provision of documents, availability of people, timely feedback)?</li> <li><input type="checkbox"/> Are all roles and responsibilities clearly assigned?</li> <li><input type="checkbox"/> Is your team ready to actively engage and provide timely input and access to information?</li> <li><input type="checkbox"/> Have you considered formalizing the partnership through an agreement or MOU?</li> <li><input type="checkbox"/> Does your team have the bandwidth and energy to fully participate in the TA?</li> <li><input type="checkbox"/> Are there competing priorities that could interfere?</li> <li><input type="checkbox"/> Have you allowed sufficient time for a proper needs assessment before the TA begins?</li> <li><input type="checkbox"/> Have you shared relevant background and context with the TA provider?</li> <li><input type="checkbox"/> Have you identified how this TA complements other initiatives?</li> <li><input type="checkbox"/> Have you informed the TA provider of other relevant efforts to avoid duplication?</li> <li><input type="checkbox"/> Have all key stakeholders been identified and engaged from the beginning?</li> <li><input type="checkbox"/> Are you involving relevant partners (e.g., World Bank, UNICEF, GPE) to support sustainability?</li> <li><input type="checkbox"/> Are the success indicators aligned with your goals?</li> <li><input type="checkbox"/> Have you agreed on ways of working with the TA team (communication, decision-making, etc.)?</li> <li><input type="checkbox"/> Have regular check-ins with the TA provider been scheduled?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Is the TA request aligned with your and the recipient's broader goals for foundational learning?</li> <li><input type="checkbox"/> Have you clearly defined what you want to achieve through the TA?</li> <li><input type="checkbox"/> Has this been agreed with the TA recipient?</li> <li><input type="checkbox"/> Has this been clearly communicated to the TA provider?</li> <li><input type="checkbox"/> Do you and the TA recipient understand the scope of work—what will happen, by whom, and when?</li> <li><input type="checkbox"/> Have you ensured that the timing of TA fits well with the TA recipient's calendar and avoids periods of low availability (e.g., holidays)?</li> <li><input type="checkbox"/> Have you agreed on your team's responsibilities (provision of documents, availability of people, timely feedback)?</li> <li><input type="checkbox"/> Are all roles and responsibilities clearly assigned, including within the TA recipient's team?</li> <li><input type="checkbox"/> Is your team ready to actively engage and provide timely input and access to information?</li> <li><input type="checkbox"/> Is the TA recipient ready to actively engage and provide timely input and access to information?</li> <li><input type="checkbox"/> Have you considered formalizing the partnership through an agreement or MOU?</li> <li><input type="checkbox"/> Does your team and the TA recipient have the bandwidth and energy to fully participate in the TA?</li> <li><input type="checkbox"/> Are there competing priorities that could interfere?</li> <li><input type="checkbox"/> Have you allowed sufficient time for a proper needs assessment before the TA begins?</li> <li><input type="checkbox"/> Have you shared relevant background and context with the TA provider?</li> <li><input type="checkbox"/> Have you identified how this TA complements other initiatives?</li> <li><input type="checkbox"/> Have you informed the TA provider of other relevant efforts to avoid duplication?</li> <li><input type="checkbox"/> Have all key stakeholders been identified and engaged from the beginning?</li> <li><input type="checkbox"/> Are you involving relevant partners (e.g., World Bank, UNICEF, GPE) to support sustainability?</li> <li><input type="checkbox"/> Are the success indicators aligned with your goals and with the goals of the TA recipient?</li> <li><input type="checkbox"/> Have you agreed on ways of working with the TA team (communication, decision-making, etc.)?</li> <li><input type="checkbox"/> Have regular check-ins with the TA provider been scheduled?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Have you understood both the requestor and administrator's goals and expectations?</li> <li><input type="checkbox"/> Do you have clarity on the broader system or organizational objectives the TA is meant to support?</li> <li><input type="checkbox"/> Are your role, responsibilities, and deliverables clearly defined and agreed upon before starting?</li> <li><input type="checkbox"/> Do you understand the timeline, milestones, and any interdependencies involved?</li> <li><input type="checkbox"/> Have you allocated time and resources to conduct a thorough needs assessment?</li> <li><input type="checkbox"/> Are you listening carefully to the requestor's / TA recipient's context, challenges, and goals before designing support?</li> <li><input type="checkbox"/> Do you understand how your support fits within the wider landscape of initiatives and efforts?</li> <li><input type="checkbox"/> Are you clear on what unique value your TA brings and how it can create meaningful impact?</li> <li><input type="checkbox"/> Have all relevant stakeholders (e.g., ministry staff, partners, donors) been identified and engaged from the start?</li> <li><input type="checkbox"/> Are you creating space for inclusive participation, including from marginalized or underrepresented groups?</li> <li><input type="checkbox"/> Are you coordinating with other TA providers or development partners to avoid duplication and promote synergy?</li> <li><input type="checkbox"/> Are you aligned with local processes, cycles, and systems?</li> <li><input type="checkbox"/> Have you agreed on ways of working, including communication channels, frequency of check-ins, and decision-making processes?</li> <li><input type="checkbox"/> Are expectations around responsiveness, timelines, and input clearly communicated?</li> <li><input type="checkbox"/> Are you supporting local ownership and capacity development to ensure the sustainability of your TA?</li> <li><input type="checkbox"/> Have you explored opportunities to bring in or align with in-country partners (e.g., UNICEF, World Bank, GPE)?</li> <li><input type="checkbox"/> Are your success indicators aligned with the requestor's goals and realistic given the context?</li> </ul>

## During TA: Managing the Provision of Technical Assistance

Checklist for TA requestors (when requestors are also recipients of TA)	Checklist for TA requestors (when requestors are NOT recipients of TA)	Checklist for TA providers
<ul style="list-style-type: none"> <li><input type="checkbox"/> Are you actively applying insights and learnings from the TA to inform your strategies, decisions, and practices?</li> <li><input type="checkbox"/> Are you encouraging your team to adapt and evolve their thinking based on what's being learned?</li> <li><input type="checkbox"/> Are you creating space for regular reflection, including discussing challenges, setbacks, or what hasn't worked?</li> <li><input type="checkbox"/> Are you fostering a culture where honest feedback is welcomed to improve the TA process and outcomes?</li> <li><input type="checkbox"/> Are you facilitating ongoing dialogue between the TA team and other partners or initiatives to ensure alignment and complementarity?</li> <li><input type="checkbox"/> Are you sharing relevant updates or changes from related programs that could affect the TA?</li> <li><input type="checkbox"/> Are any new terms of reference, policies, or plans being aligned with the goals and direction of the current TA?</li> <li><input type="checkbox"/> Are you avoiding parallel efforts that could duplicate or dilute the TA's impact?</li> <li><input type="checkbox"/> Are you actively identifying ways to embed and sustain the gains from the TA?</li> <li><input type="checkbox"/> Are you involving relevant stakeholders early in planning for long-term ownership and follow-through?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Is the TA recipient actively applying insights and learnings from the TA to inform their strategies, decisions, and practices?</li> <li><input type="checkbox"/> Are you encouraging the TA recipient to adapt and evolve their thinking based on what's being learned?</li> <li><input type="checkbox"/> Are you creating space for regular reflection, including discussing challenges, setbacks, or what hasn't worked?</li> <li><input type="checkbox"/> Are you fostering a culture where honest feedback is welcomed to improve the TA process and outcomes?</li> <li><input type="checkbox"/> Are you facilitating ongoing dialogue between the TA team, the TA recipient, and other partners or initiatives to ensure alignment and complementarity?</li> <li><input type="checkbox"/> Are you sharing relevant updates or changes from related programs that could affect the TA?</li> <li><input type="checkbox"/> Are any new terms of reference, policies, or plans being aligned with the goals and direction of the current TA?</li> <li><input type="checkbox"/> Are you avoiding parallel efforts that could duplicate or dilute the TA's impact?</li> <li><input type="checkbox"/> Are you actively identifying ways to embed and sustain the gains from the TA?</li> <li><input type="checkbox"/> Are you involving relevant stakeholders early in planning for long-term ownership and follow-through?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Are you spending meaningful, in-country time with the TA recipient, especially for key activities like workshops and planning sessions?</li> <li><input type="checkbox"/> Are you using in-person settings to build trust and deepen understanding?</li> <li><input type="checkbox"/> Are your workshops and meetings focused not just on content delivery but on actionable learning and clear next steps?</li> <li><input type="checkbox"/> Are responsibilities and follow-up tasks clearly assigned after each session?</li> <li><input type="checkbox"/> Are you acknowledging when you're unfamiliar with aspects of the local context and inviting learning from the recipient's expertise?</li> <li><input type="checkbox"/> Are you demonstrating openness and vulnerability to build a stronger partnership?</li> <li><input type="checkbox"/> Are you showing reliability, responsiveness, and flexibility throughout the TA engagement?</li> <li><input type="checkbox"/> Have you created a safe environment where the client can raise concerns or challenges honestly?</li> <li><input type="checkbox"/> Are you maintaining a clear, professional approach that builds trust and encourages long-term collaboration?</li> <li><input type="checkbox"/> Are you transparent about the boundaries of your own knowledge (e.g., cultural or geographic limitations)?</li> <li><input type="checkbox"/> Are you intentionally bringing in diverse voices and seeking multiple perspectives?</li> <li><input type="checkbox"/> Are you asking open-ended questions to uncover underlying issues or unmet needs (e.g., "What's keeping you up at night?")?</li> <li><input type="checkbox"/> Are you actively listening for concerns beyond what's immediately visible?</li> <li><input type="checkbox"/> Are you encouraging the recipient to develop and apply their own solutions using insights from the TA?</li> <li><input type="checkbox"/> Are you fostering capacity, not dependency?</li> <li><input type="checkbox"/> Are you creating opportunities for honest reflection, including discussion of challenges or failures?</li> <li><input type="checkbox"/> Are you collecting feedback and adapting your support in response to evolving needs and circumstances?</li> <li><input type="checkbox"/> Are you in regular contact with other TA providers or partners to align activities and avoid duplication?</li> <li><input type="checkbox"/> Are you promoting coherence between different support mechanisms through shared meetings or planning?</li> </ul>

## Post-TA: Carrying the Work Forward

Checklist for TA requestors (when requestors are also recipients of TA)	Checklist for TA requestors (when requestors are NOT recipients of TA)	Checklist for TA providers
<ul style="list-style-type: none"> <li><input type="checkbox"/> Are you clear on what your team needs to do to implement the TA recommendations?</li> <li><input type="checkbox"/> Have you confirmed that you have all necessary materials, tools, and guidance from the TA provider to move forward?</li> <li><input type="checkbox"/> Are regular check-ins or follow-up conversations planned to track implementation and identify any ongoing support needs?</li> <li><input type="checkbox"/> Are you monitoring progress and adjusting actions as needed based on real-time feedback?</li> <li><input type="checkbox"/> Is your team actively pushing forward key reforms or changes identified through the TA?</li> <li><input type="checkbox"/> Are you leveraging the momentum from the TA to build broader support and accountability for implementation?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Are you clear on what your team needs to do to support the TA recipient in implementing the TA recommendations?</li> <li><input type="checkbox"/> Have you confirmed that you have all necessary materials, tools, and guidance from the TA provider to move forward?</li> <li><input type="checkbox"/> Are regular check-ins or follow-up conversations planned to track implementation and identify any ongoing support needs?</li> <li><input type="checkbox"/> Are you monitoring progress and adjusting actions as needed based on real-time feedback?</li> <li><input type="checkbox"/> Are you supporting the TA recipient in actively pushing forward key reforms or changes identified through the TA?</li> <li><input type="checkbox"/> Are you leveraging the momentum from the TA to build broader support and accountability for implementation?</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Have you revisited the sustainability plan with the TA requestor/recipient to ensure that they have the skills, resources, and confidence to carry the TA recommendations forward independently?</li> <li><input type="checkbox"/> Have you confirmed that key outputs are clearly documented and accessible to the TA requestor/recipient?</li> <li><input type="checkbox"/> Are regular post-TA check-ins scheduled to monitor progress and offer ongoing support as needed?</li> <li><input type="checkbox"/> Are you responsive to emerging implementation challenges or questions?</li> <li><input type="checkbox"/> Have you considered follow-up workshops or sessions to:                         <ul style="list-style-type: none"> <li>• Refine and build on the outputs</li> <li>• Reflect on implementation learnings</li> <li>• Engage and train partners who were not involved earlier?</li> </ul> </li> <li><input type="checkbox"/> Have you re-engaged key stakeholders to support the institutionalization of TA outputs within the education system or broader structures?</li> <li><input type="checkbox"/> Are the tools, practices, or frameworks developed through the TA being integrated into ongoing work?</li> </ul>

ANNEX B: BRINK'S PRE MORTEM TOOL FOR UBORABORA

<h2>Pre Mortem</h2>	<b>Level</b> Simple	<b>Who you need?</b> > Facilitator > Team > Product Owner	<b>Time it takes</b>  1 hour	<b>You can do this...</b> <input type="checkbox"/> IRL <input type="checkbox"/> Virtual <input type="checkbox"/> DIY	<b>Ideal moment</b> > Project kick off > After a rough patch > Moving between phases
<p>We all have optimism bias. We need it for survival. But it means when we're planning and delivering projects, we all think the bad things won't happen to us.</p> <p>Cue: the pre-mortem. Typically teams ask 'how did it go?' or 'what could we have done better?' at the end of a project. A post-mortem. Instead a pre-mortem asks us ahead of time. By putting ourselves in the future and using 'prospective hindsight' we surface opportunities and risks that could make or break the work.</p> <p>This <a href="#">increases our ability</a> to draw on our expertise and apply it to the tasks ahead.</p>	<b>Facilitator notes</b> <ol style="list-style-type: none"> <li><b>1   Introduce the exercise</b> This exercise will help us visualise a goal, imagine what success and failure looks like, and discuss what lies ahead that's likely to cause this project to succeed or fail.</li> <li><b>2   Success and Failures</b> Ask the group to close eyes and visualise: <i>We're at the end of the phase or project and it has been a huge success. Why? What comes to mind when we think about this moment?</i> Then repeat the exercise, imagining that it has been a failure: <i>It's the end of the phase or project and it has failed. What went wrong? Why?</i></li> <li><b>3   Enablers and blockers</b> Facilitate the group to identify what would cause these risks or opportunities to occur. As they call out enablers or blockers write each on a post it and map onto a 2 x 2 on the wall or floor, from high to low probability and high to low impact.</li> <li><b>4   Actions</b> Focus on everything in the high impact, high probability quadrant. Does the group agree on which should be addressed most urgently? Leave room for debate where there is difference in opinion. Finally assign each risk one an owner to keep an eye on it during the project and enlist others' help when they need.</li> </ol>				
<b>Nudges &amp; skills</b> <ul style="list-style-type: none"> <li>&gt; Deep democracy - all voices have equal say. Have the product owner or most vulnerable person speak last</li> <li>&gt; Visualisation - take yourselves into the future. Be specific, and use language that indicates you are in the future</li> <li>&gt; Psychological safety - work to make sure people feel safe to express their worries</li> </ul>	<b>Indicators of Success</b> <ul style="list-style-type: none"> <li>&gt; Clear vision and goal</li> <li>&gt; Issues surfaced which have not previously been discussed openly</li> <li>&gt; Clear action to address issues, with an owner assigned to each</li> </ul>	<b>Good to know</b> <ul style="list-style-type: none"> <li>&gt; This is Nobel prizewinning psychologist Daniel Kahneman's <a href="#">favourite tool</a> for overcoming the optimism bias we all have, and at Brink it's our favourite, too.</li> </ul>  <p><a href="http://www.hellobrink.co">www.hellobrink.co</a></p>			