

## Community Schools Technical Assistance Centers Site Visit Report and Summary Templates

These templates are designed to standardize follow-up documentation for technical assistance, ensuring clarity and consistency across reports. While you may not have content for every single bullet point in each template, aim to address most of the points to provide a well-rounded summary. The goal is for your documentation to reflect the depth and duration of each session, covering key activities, resources shared, and recommended next steps proportionate to the level of support provided.

To streamline your reporting, consider developing outlines or summaries for commonly addressed topics and frequently shared resources. Having prepared content for these recurring areas will make it easier to complete reports efficiently and ensure consistent messaging. You can then adapt these outlines as needed for each specific session, dropping them into reports when relevant. This approach not only saves time but also enhances the quality and consistency of documentation across different sessions.

It is not required that you use these templates *word for word*. Greetings and language can be adapted to reflect your personal style and tone. Content *should* reflect the overall structure of the templates.

## Template for TA of 2 Hours or Less

- **Assistance Focus:** Briefly describe the main topic or issue addressed during this session.
- **Key Activities:** Summarize core activities or guidance provided.
- **Immediate Outcomes:** Note any quick feedback or immediate actions taken by the client.
- **Additional Resources Shared (if any):** List specific resources, links, or documents provided.

## Follow-Up Email Template for TA of 2 Hours or Less

**Subject:** Summary of Our Recent Technical Assistance Session

Dear [Name],

Thank you for the opportunity to support your work. Below is a brief summary of our recent session, including resources and suggested next steps.

**Topics Covered:**

*Briefly summarize the main topic or focus of the session (cut and paste from site visit report where possible).*

**Key Activities and Guidance Provided:**

*Summarize the activities or guidance provided, focusing on the essential points (cut and paste as needed).*

**Resources Shared:**

*Include links to any documents or resources provided during the session.*

**Next Steps:**

*Provide a simple, actionable recommendation based on the discussion. Tailor this suggestion to the client's current capacity (cut and paste or summarize from site visit report).*

Please feel free to reach out with any questions or additional needs. I look forward to our continued work together.

Warm regards,  
[Your Name]  
[Your Position]

## Template for TA of 2-5 Hours

- **Assistance Focus:** Describe the primary goal(s) and the issues discussed.
- **Detailed Summary of Activities:**
  - Highlight significant activities, including specific strategies shared and main discussion points.
  - Note any adaptations or tailored support based on client needs.
- **Outcomes and Next Steps:** Document observable changes, client feedback, or follow-up actions recommended.
- **Follow-Up Resources or Contacts:** List resources, contacts, or next steps for ongoing client support.

## Follow-Up Email Template for TA of 2-5 Hours

**Subject:** Follow-Up and Summary from Our Technical Assistance Session

Dear [Name],

Thank you for your time and partnership in our recent technical assistance session. Here is a summary of our discussion, along with relevant resources and steps for moving forward.

### **Summary of Discussion:**

*Summarize primary goals and topics discussed, adapted from the site visit report.*

### **Key Activities:**

*Provide a summary of significant activities or strategies covered in the session (cut and paste or briefly describe based on the site visit report).*

### **Resources Shared:**

*List and link to any documents, tools, or resources provided to support your work (cut and paste as needed).*

### **Recommendations and Next Steps:**

*Provide tailored recommendations for next steps that align with the client's needs and capacity. Use suggestions directly from the site visit report, summarizing where appropriate.*

Please let me know if any additional support or resources would be helpful as you move forward. I look forward to seeing your progress and am here for further assistance.

Best regards,  
[Your Name]  
[Your Position]

## Template for TA of Over 5 Hours

- **Assistance Focus:** Define the primary objectives and contextual background of the TA provided.
- **Comprehensive Activity Summary:**
  - Describe each session or set of activities in detail, including:
    - **Topics Covered:** Major themes or areas of focus.
    - **Methods Used:** Specific strategies, tools, or frameworks discussed.
  - Any client engagement, such as collaborative planning or feedback integration.
- **Results, Observations, and Client Response:**
  - Summarize documented outcomes, including progress on specific goals or tasks.
  - Include client feedback and any requests for additional support.
- **Documentation and Resources Provided:** List all materials shared (e.g., handouts, links, templates), along with any resources recommended.
- **Future Plans and Follow-Up Actions:**
  - Outline any planned follow-up sessions or areas identified for further support.
  - Specify any deadlines or points for reevaluation if applicable.

## Follow-Up Email Template for TA of Over 5 Hours

**Subject:** Comprehensive Summary and Recommendations from Our Technical Assistance Engagement

Dear [Name],

It's been a pleasure supporting your work. I'm pleased to provide a comprehensive summary of our recent sessions, including recommendations and additional resources tailored to your needs.

### **Summary of Activities and Topics Covered:**

*Provide a detailed overview of the key topics and strategies covered. Include specific methods and any adjustments made for the client's unique needs (cut and paste directly from the site visit report).*

### **Engagement and Feedback:**

*Summarize any collaborative planning, feedback, or notable responses from the client during the engagement (cut and paste or summarize as appropriate).*

### **Resources and Documentation:**

*Attach or link to relevant materials provided during our sessions, such as handouts, templates, or recommended readings (cut and paste from the site visit report).*

**Tailored Recommendations and Next Steps:**

*Outline recommended actions and follow-up steps based on session outcomes. These should align with the client's ongoing needs and capacity. Adapt recommendations directly from the site visit report.*

I'm excited to see these strategies take shape in your work and am available for any additional support or follow-up as needed. Please don't hesitate to reach out with questions or updates.

Warm regards,

[Your Name]

[Your Position]