# Coalition Manager Guidance Note

* What is TA?
* What should I record under PA?
* How should I record site visits?
* How do I record non-coalition trainings?
* Do I include meeting prep time in total time?

## Contact Types

**Member programs:** ANDVSA’s organizational member programs

**Individual Partner**: partners that we work with who are not representing a specific organization or agency. *Examples: elder representatives on Pathways to Prevention*

**Partner Organization:** organizations who are not member programs but that ANDVSA works with closely or frequently. *Examples: Alaska Native Women’s Resource Center, Alaska Institute for Justice, CDVSA*

**State/National Coalitions:** other groups made up of different members, agencies or groups who have joined together for a specific purpose. *Examples: Alaska Housing Coalition, Alaska Resiliency Commission, NNEDV*

## Technical Assistance

### What is Technical Assistance (TA)?

 “Technical assistance” is a term used frequently in our field and by grant funders. It is direct, problem-solving service provided by ANDVSA; provided to members, non-members, partners, and individuals. TA provides sound advice and in-depth analysis of the intended and unintended consequences of actions and decisions callers are contemplating. It supplements training rather than replacing it.

* If it takes more than 10 minutes
* If you are sharing resources, phone numbers, handouts on a specific topic or to another professional
* If you have to contact someone else to get an answer
* If you are offering suggestions to fix a problem or improve a response

**Technical assistance is NOT:**

* Answering a general question, for example, “When is your conference?”
* Helping someone log into Basecamp
* Connecting a caller to a member program or sending them basic information about DVSA

The **types** of requests ANDVSA commonly receives include:

* Personnel issues
* Standards provision and assistance
* Questions regarding the provision of services to survivors of domestic and sexual violence
* Assisting survivors with services when there is a gap in existing services
* Handling complaints with and gaps in existing services
* Legal issues related to the operation of their organization
* Legal issues affecting survivors/clients
* Current laws, needed laws, and public policy

**Technical Assistance according to OVW:**

Technical assistance is… “A wide variety of activities designed to facilitate individual or agency change in some systematic manner by providing expertise to solve a problem.”

“Examples of technical assistance activities include clarifying legislative and policy implementation and/or standards of service, technology consultations, and assistance with problem-solving.”

### Entering Technical Assistance

**When entering TA to a survivor,** input first name as “Anonymous”, last name as “Survivor” or “Secondary Survivor” if not direct victim. Do not list an occupation.

## Site Visits

The goal of entering site visit information is to make it very easy to pull a snapshot of which programs have had site visits, what services were provided and total the information required for grant reporting. Depending on the type of support you provide during a site visit you may need to enter multiple types of activities.

Project Activity:regardless of the other services you provide, **always enter a site visit under Project Activity with the project type as “Site Visit”.** Set the time to be the days you were on-site. You can manually add the program staff who participated to the “Participants”, or just add the member program and increase the “Participant Count” to total the number of program staff members who were present. If you provided training or TA, include this in the notes section. When possible, use the specific title of the training or presentation to make it easier to find in the Training module.

Training: if you do a workshop, presentation or other training event, enter it in the Training module. Fill out the information as you normally would and include in the notes that it was part of a site visit.

Technical Assistance: if you do technical assistance while on-site, enter it in the Technical Assistance section. Fill out the information as you normally would and include in the notes that it was part of a site visit.

*Tip:**Because the note section is searchable by term, always include the term “site visit” in your notes for any activities conducted during a site visit. This makes it easier to track what training and technical assistance was conducted as part of a site visit.*

*\*\*\*Questions for staff:* when you do a site visit, how do you report it in your grants?

What if you provide multiple sessions? ie, morning training on confidentiality, afternoon training on substance use? Count all participants twice, or consider it one event and count once?

## Project Activity

The Project Activity (PA) section is used to track meetings, projects, and professional development. Examples include:

* Attending a training or conference *(professional development)*
* Attending a round-table or other networking event
* Meetings to plan a training
* Meetings with subrecipients or other partners

The Project Activity module is more flexible in how it can be used. Use these criteria when deciding if you should enter a Project Activity:

* Is the activity something I need to report on for my grant?
	+ Coordinated community response, system improvement, etc.
* Did the activity involve important strategic partners or subrecipients?
* Was the activity a professional development activity?
	+ Professional Development is an in-person or online training, conference or workshop that was intended to be a learning experience or improve your ability to do your job
* Are there other reasons why I would like to track this activity?

### Entering Project Activities

**In order to have a project activity show up on a grant report, you must complete the Staff Involvement section with your total time and grant code.**

## General FAQs

### Should I include meeting prep time in my overall time entry?

No. Only include the time spent in the meeting. If you want to also track your meeting prep time, enter that in as a separate Project Activity, or include the prep time in your notes.

### If multiple ANDVSA staff people are involved, who should enter the activity?

Typically, the person organizing and leading the event or activity should enter the activity and add the other ANDVSA staff members as participants. When both parties are responsible for coordinating and leading the event or activity, the person who manages the grant the activity relates to should enter the activity in Coalition Manager.

*Tip: make sure to mark the activity as “Pending” if you tag someone in it. They should review their “billed hour” and funding source if applicable.*

### Do I have to enter the “Miles Traveled” for PA or training?

No, but make sure to select the region where this activity occurred if travel was involved.

### I can’t pull the information I’m looking for, or it’s showing up wrong.

Contact the point-person for Coalition Manager, Maria, to troubleshoot. If there’s an error in the system or other issues, she will contact Coalition Manager support.

## General Tips

### Making it easier to search

When entering notes, remember that the notes sections are searchable by keyword. Select terms and titles carefully with this in mind. Include the exact name of a presentation, resources, etc, in order to make it easier to find.

Example: *“Presented on LGBTQ issues during site visit using Culturally Proficient Care for LGBTQ individuals”* is easier to search and track compared to *“Presented on LGBTQ issues during site visit”*

### Use standardized words

**Site visit** not “site-visit”, “on-site”, or “in the field”