# Improving Professional Development Offerings: Steps to Conduct a Needs Assessment

**Instructions:** Use this checklist as a starting point for items to consider. Customize this document, adding relevant information as appropriate or removing information that does not apply to your situation.

## Conducting a Needs Assessment

A needs assessment should be a thoughtful and purposeful process. Overall, there are four general steps involved in conducting a needs assessment:

1. Plan
2. Develop questions
3. Select data collection method
4. Analyze and prioritize data

### Step 1: Plan

Consider several questions before developing and conducting a needs assessment.

| Check Box | To Consider When Planning |
| --- | --- |
| [ ]  | What is the primary purpose of the assessment? What do you need to know? |
| [ ]  | What do you already know? What existing data do you have? |
| [ ]  | Whose needs are being assessed? Who needs to participate so the results of the assessment are representative? |
| [ ]  | What do you have the ability to change? |
| [ ]  | How will you use the information? |
| [ ]  | What resources are available to conduct a needs assessment (e.g., budget, people, and time)? |

The answers to these guiding questions will inform decisions about what is asked, how it is asked, and how the information is utilized.

### Step 2: Develop Questions

The usefulness of a needs assessment is only as good as its questions. Think about the following guiding questions as you develop your needs assessment:

| Check Box | To Consider When Developing Questions |
| --- | --- |
| [ ]  | What should be assessed (e.g., attitudes, skills, knowledge, technology needs, leadership ability)? |
| [ ]  | Will the question yield useful information? |
| [ ]  | Will the respondent be able to answer the question? |
| [ ]  | Is the question necessary? |
| [ ]  | What question format is best for gathering information (e.g., multiple-choice question, open-ended question, checklist, etc.)? |

Remember, more questions are not always better. Limit the number of questions to only those that are necessary, given the purpose of the needs assessment. It is also important to pilot your questions to verify that the questions are clear and easy to understand and that respondents interpret them in a consistent way.

### Step 3: Select Data Collection Method

A needs assessment may take many different formats. The most common formats include surveys, interviews, focus groups, or key informant interviews. A needs assessment might utilize one or more data collection formats. The following table shows the pros and cons for these data collection formats.

| Check Box | To Consider When Selecting Data Collection Method |
| --- | --- |
| [ ]  | What format best applies for data collection in this case? |
| [ ]  | Will more than one format be utilized for data collection? |

### Step 4: Analyze and Prioritize Data

Once you have planned, developed, and conducted a needs assessment, you will have an abundance of data. For this information to be useful and meaningful, you need to analyze and summarize it. Tips for analyzing data include:

* Look for themes in responses.
* Aggregate data to explore differences in responses (e.g., teachers compared to administrators).
* Synthesize your data. Think about the connections and meaning from different sources of information.

The data from a needs assessment is most beneficial if it is shared and used to guide decisions and focus future work. After the results are analyzed, identify your professional development priorities keeping in mind the following questions:

| Check Box | To Consider When Analyzing and Prioritizing Data |
| --- | --- |
| [ ]  | What is the primary purpose of the assessment? What do you need to know? |
| [ ]  | What do you already know? What existing data do you have? |
| [ ]  | Whose needs are being assessed? Who needs to participate so the results of the assessment are representative? |
| [ ]  | What do you have the ability to change? |
| [ ]  | How will you use the information? |
| [ ]  | What resources are available to conduct a needs assessment (e.g., budget, people, and time)? |

Lastly, given the results of the needs assessment and the prioritization of professional development needs, the next step is to identify solutions and opportunities for action to address the professional development needs of the target audience. Information from a needs assessment can be used as the foundation and guide for determining such things as:

* Professional development goals and objectives
* Design and content of professional development offerings
* Strategies for follow-up support and technical assistance
* Evaluation activities

## Sources

Davis, M. & Harmacek, M. (1997). *School health needs assessment: A starter kit*. Denver, CO: University of Colorado, Health Sciences Center.

Romney, V.A. (1996). *Strategic planning and needs assessment.* Fairfax, VA: Decker and Associates.

Rouda, R.H. & Kusy, M.E. (1995). *Needs assessment: The first step.* Retrieved online on 1/25/2006 at http://alumnus.caltech.edu/~rouda/T2\_NA.html

Tobey, D. (2005). *Needs assessment basics.* Alexandria, VA: American Society for Training and Development.

Wolf Schwartz, M. (2001, October). Needs assessment pointers. *Latitudes, 10 (5)*.