

Conducting a Needs Assessment

Description:

This tool provides an overview of needs assessments, some guidelines, a checklist and a list of the process and steps.

How it can be used:

When considering how integration can benefit your health organization and your community, it is important to understand the needs of the population that you serve. This tool helps to identify the steps and the types of information that you will need to collect. That allows you to determine how and where integration with other services will enhance what you currently offer.

What is a needs assessment in the integration context?

A needs assessment is a systematic process for determining and addressing needs, or "gaps" between current conditions and desired conditions or "wants". Through this process, you can identify where your organization would benefit from linkages or integration with other organizations.

Why do you need to conduct a needs assessment before considering integration activities?

- Gain a deeper understanding of the community you serve – the needs and assets, culture and social structure, relationships, history, strengths and conflicts.
- Understand the community's assets – how they can be used to help address the community's needs.
- Make decisions about priorities for program or system improvement – understanding the needs and assets is empowering when seeking to address issues and enhance services.

What are the characteristics of a successful needs assessment?

1. The current situation is understood: Where are you strong? Where can you improve?
2. A vision of the future is defined: What are you seeking? What is our "best organization"?
3. The assessment process is driven by key questions: How will integration help us improve? What do you need to do? Do you have the capacity? What are our limitations?
4. Issues that are important to stakeholders are addressed: Who needs to be involved and why? How will this affect the services you provide and receive? Are the changes sustainable?
5. Information is communicated back to stakeholders: What types of information does each stakeholder need?

Who should be involved in developing a plan for assessing local needs and resources?

The assessment process is most beneficial when there is full participation from community and organizational stakeholders. Review this checklist and identify the relevant participants. Is there anyone else who should be involved but isn't on this list?

Participant/Function	Potential participants
Those directly affected by the services – patients, clients, their families, etc.	
Health providers – staff, outreach workers, home care workers, community health representative, etc.	
Elders and community influencers	
Community leadership – Chief, Health/Social/Education Councillors, etc.	
Board of Directors – of your health centre, or your health committee.	
Government partners – Regional Health Authority, Provincial, Federal, etc.	

Plan and conduct the assessment

1. Determine why the needs assessment is being conducted. In this situation, you are looking for the reasons why and how integration with other programs and/or services will enhance your organization. This clarifies from whom and how you gather information, what is assessed, and what you do with the information you get. It's important to start planning with a clear understanding of what you're setting out to do, so that your plan matches your goals.
Are you seeking:
 - To address the needs of a particular group?
 - To launch a health campaign or combat a particular disease or condition?
 - To inform the activities of a group?
 - To guide policy creation through the provision of credible recommendations?
 - To improve the cultural competence of health care providers?
2. Recruit a planning/advisory group.
 - Determine whether or not you need two groups and if the advisory group is going to be the coordinating group?
 - Who should be on the planning group?
 - Is any training or orientation required?
3. Design an evaluation process for the needs assessment.
 - Provide evaluation opportunities of the process so it will inform future work.
 - Evaluation needs to be participatory and inclusive, like the needs assessment process.
4. Identify the objectives of the needs assessment (“name and frame” the goal).
 - Develop a process for achieving the goal.
 - Identify the questions and how they should be asked.
5. Determine the data and information that is already available. It may be:
 - Community health information;
 - Health centre data;
 - Program data (e.g., from Home and Community Care);

- Provincial data;
 - Not-for-profit organizations;
 - Research institutions (e.g., universities).
6. Determine what information you still need to collect, as this will guide the development of the questions.
- Include community level indicators.
 - Consider whether or not you require any special permission.
 - Be clear on the level of personal data you are collecting.
7. Determine how you will collect your data. Will you use:
- Listening sessions?
 - Dialogue circles?
 - Focus groups?
 - Public forums?
 - Key informant interviews?
 - Direct/participant observation?
 - Surveys?
8. Decide on the participants.
- Consider this thoroughly, to ensure a broad range of input and perspectives.
 - Include all points of view, not only those that support your intended direction.
9. Identify who will collect the data.
- Will you use employees, consultants or community members working in collaboration with professionals?
 - If you include people from outside the community, is any cultural training required?
 - It is also appropriate to use a mix of different approaches.
10. Contact the participants.
- How will you contact them?
 - What materials need to be prepared in advance? Is there a script or background document? Does a “Release of Information” document need to be developed (for personal information)?
11. Collate and analyze the data.
- Identify main themes.
 - Compare feedback with indicators.
 - Determine how this fits with organizational goals.
12. Report on the findings of the analysis.
- a. To whom will this be presented (e.g., leadership, stakeholders, community)?
 - b. How will you present the results? When?
13. Incorporate the results of the process into your planning processes.