



## **Needs Assessment and Analysis**

The Learning Key® Approach

Organizations today, stressed by enormous competitive pressures, often jump into action before stepping back and analyzing exactly what action is most appropriate. This translates into programs and human resource systems designed and delivered by “crisis” management, often without integration with other organizational activities. Organizations, regardless of size or industry, cannot afford a haphazard approach to organizational development or to education and training. Identifying and defining appropriate processes or programs, based on more than initial assumptions, is critical.

A needs assessment can be used to determine the extent of a specific issue or concern and to plan a way to address that issue. Alternatively, and more appropriately in our experience, such a process can be applied in a broader context. In the training function, for example, this might include analyzing an entire “learning” curriculum needs and priorities to form the basis of an implementation plan. In organizational consulting a needs assessment can provide the foundation for changing structures business processes and roles, or improving intergroup collaboration, or changing work approaches or culture.

In each of these examples, a needs assessment is a cost-effective approach to minimize the likelihood of misspent resources and of inappropriate solutions. It also tends to expand the number of techniques used to gather information and reduce dependence on one or two favorite strategies. Thus, it is essential to use a variety of diagnostic tools for assessing organizational development or training and development needs.

### **The Process**

#### ***Understanding the Situation***

- Defining objectives, people impacted, and tasks
- Developing agendas, sample questions

#### ***Collecting information***

Using information from only a few sources may restrict the range of alternatives considered as well as mislead. For this reason we generally use a variety of methods, often including:

- Identification of sources of data
- Review of existing data
- Data collection techniques, such as interviews, questionnaires, small and large group meetings, committees, focus groups, and observations

#### ***Analyzing the Data***

A variety of quantitative methods are generally used in data collection and analysis. For example, data can be rank-ordered in terms of priority, interest, etc. so the responses between participating groups (such as departments or divisions) can be compared. In determining organizational priorities, for example, there may be areas of common need as well as areas of disparate need, even within a single division.

#### ***Planning the Implementation***

Often, recommendations coming out of a needs analysis process form the basis of both a short- and long-term plan. The data collected is analyzed to prioritize needs and create an implementation plan. Generally, we do this prioritization in several steps:

1. Rank ordering data by importance, desirability, frequency selected, etc.
2. Presentation of ranked data and preliminary conclusions to one or more representative groups able to weigh all the information, assess relative importance and priority, and come to consensus. This process is a fine-tuning of the results and leads to step three.
3. Incorporating recommended modifications and revisions.

#### ***Needs Analysis Report***

This document summarizes data findings and recommendations.

# Examples of Different Types of Needs Assessment Projects

Completed by The Learning Key®

Project	Goals	Process	Time
A	Assess general learning needs and priorities for coming year in a clinical organization	<ul style="list-style-type: none"> <li>• One-on-one interviews with senior leaders representing all major areas; analyze data collected and generate report summary and recommendations</li> </ul>	6 Days
B	<p>Assess skills and training needed for R&amp;D and manufacturing divisions</p> <p>Develop priorities out to five years</p>	<ul style="list-style-type: none"> <li>• One-on-one interviews with directors</li> <li>• Half-day meeting, including lunch with several representatives from each dept: analyze present and future skills needed, develop survey (common survey and sections for each dept/division)</li> <li>• Distribute survey; collect and collate data</li> <li>• Meet with one representative from each department (selected at one-half day meeting)--discuss survey results and make additions. Discuss implementation plan</li> <li>• Develop implementation plan</li> <li>• Prepare final report</li> </ul>	5 Days
C	<p>Assess soft skills and technical training needed for R&amp;D division of 2,500</p> <p>Develop roll-out plan and curriculum for next five years</p> <p>Develop ongoing process for updating and links to performance management system</p>	<ul style="list-style-type: none"> <li>• Process similar to above, with more face-to-face group sessions to try to get as much involvement and buy-in as possible; address a number of issues in addition to skills and specific training, including delivery issues such as Who? (internal/external) When? (off or on company time) How? (formats and options, especially for some of the technical training) Non-training development alternatives</li> </ul>	18 Days
D	Assess organizational development needs	<ul style="list-style-type: none"> <li>• Interview leaders and selected staff members to collect data for a customized survey</li> <li>• Create a 360° survey for the client to evaluate areas of success and opportunities for improvement</li> <li>• Analyze and summarize data</li> <li>• Run a 2 ½-day meeting to work with the data collected and plan for future</li> </ul>	8 Days + feedback meetings