**A STREAMLINED CHECKLIST: NEEDS ANALYSIS (Chapter 2)**

Use this to checklist to analyze project needs. Select those questions that are applicable to the project needs, constraints, and resources. Adjust wording based on the nature of the project and the sponsoring organization. Compare and verify the results of your analyses of: people, data, documents, and things.

**NEEDS ANALYSIS:**

* What is the problem that needs to be solved in the organization, and what do you think has caused or contributed to it?
* How do you think the problem should be solved?
* How would you describe the current situation ("what is"), the desired situation ("what should be"), and the gap between the two (the needs)?
* What will it look like when this need is met successfully? What results are you expecting? What should the proposed instruction accomplish for the organization and for the learner?
* Who is the primary audience/learner for the instruction/training/learning experience?
* What should the learner know, be able to do, and what attitudes should he/she exhibit after the instruction or learning experience?
* What non-instructional needs might impact the effectiveness of the instruction and the success of the project?

**CONSTRAINTS ANALYSIS:**

* How would you prioritize these three factors for this project: low cost, high quality, and timely completion?
* What budget, schedule, and milestones have been established for this project?
* Are there established communication or delivery platforms or currently available technology that should be used? What is the current status of the learners’ connectivity and access?
* Have you already made decisions concerning the format of the instruction: f2f, online, blended? Self-paced or collaborative? Synchronous or asynchronous? Etc.
* Are there any constraints? Geographically dispersed learners? Time zones? International students? For how the instruction is designed? For reliable technical and logistical support? For bandwidth and connectivity?
* Are there standards, certification or regulatory requirements, or organizational guidelines that must be addressed in the instruction?

**RESOURCE ANALYSIS:**

* What human and non-human resources are available for the development and delivery of the instruction?
* What facilities, equipment, software, supplies, and services are available for the project?
* Is there technical support available?
* What is the SME availability for the development, review, and testing of the instruction?
* Who will review the instruction for accuracy, completeness, and appropriateness? Who is ultimately responsible for approving the instruction?