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To cite this article: David Royse & Karen Badger (2015) Needs Assessment Planning: Starting Where You Are, Australian Social Work, 68:3, 364-374, DOI: [10.1080/0312407X.2015.1035661](https://doi.org/10.1080/0312407X.2015.1035661)

To link to this article: <https://doi.org/10.1080/0312407X.2015.1035661>



Published online: 25 Jun 2015.



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Needs Assessment Planning: Starting Where You Are

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Abstract

Needs assessments are a useful part of the program development cycle. However, while step-by-step models are available to guide assessments, they may not be detailed enough for the pragmatic questions that arise. The planning process should be viewed as dynamic and flexible, able to be tailored to the agency's specific organisational and environmental characteristics. This paper presents a practical discussion for social workers charged with planning and implementing a needs assessment. Practitioners are empowered to consider several concerns or issues simultaneously, to build upon their organisational knowledge, and start the process where it intuitively makes sense. Major issues discussed are: planning the needs assessment, evaluating contextual factors, and design considerations.

Keywords: Needs Assessment; Program Planning; Social Work Needs Assessment

Needs assessments are helpful in identifying gaps and priorities in social services and guiding agency development and service provision. Although needs assessments are conducted within many social work settings, they may not take place as often as they should. Social workers may feel ill-prepared to conduct them and organisational, client, and environmental characteristics unique to the agency may present challenges to a planning process. The complexity of the problem being explored can also make planning a needs assessment challenging. Rittel and Webber (1973) have described societal issues such as those social workers face each day as “wicked problems” (p. 160)— meaning that solutions to these types of problems are not easily found and interventions can span multiple system levels and cross into other problem areas. Wicked problems are also characterised by the lack of a permanent solution: “Social problems are never solved. At best they are only resolved over and over again” (Rittel & Webber, 1973, p. 160). Real-life problems such as homelessness, substance abuse, child abuse, and poverty are not tidy or easy to remedy, and they do not lend themselves to a laboratory type of needs assessment where all of the independent variables are methodically controlled. Local context and characteristics must be considered and no one solution will generalise to all situations (Blackman et al., 2006).

Implications of the intricacy of the contexts in which needs assessment occurs may not be readily apparent. Needs assessment is often described in the literature using models that suggest a sequential, task-specific process (Cekada, 2011; Cook, 1989, Royse, Thyer, & Padgett, 2010). For example, a needs assessment model presented by Royse, Staton-Tindall, Badger, and Webster (2009) included these steps: (1) defining the goal or

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Accepted 19 March 2015

purpose of the assessment and why it is thought to be necessary, (2) convening a planning committee or group, (3) taking stock of the resources at hand and the time available, (4) researching the problem to learn what is known about it and what information is available, (5) designing a method to collect the data, (6) implementing the plan and gathering the data, (7) analysing the data, and (8) writing the report and sharing the results.

Although such models help clarify needs assessment tasks, presenting a model in this way may not suggest it is flexible or able to be adjusted. Consequently, one might wonder if a poor product would result if the planning committee spent half a day on Step 3 before having a good understanding of Step 1. For pedagogical presentation, complex activities are broken into discrete steps that may overly simplify the planning process in settings where social work is practised. Realities such as tight budgets, meagre resources, and already overloaded staff members who feel stretched when asked to take on additional responsibilities, all influence the needs assessment process. It is important for practitioners to realise that rather than following any model lock-step, they usually have the freedom to adjust it according to the realities and constraints found in their specific setting. Viewing the planning process as dynamic and flexible can help ensure that the final product is thoughtful, well-suited to unique considerations, and addresses essential tasks.

The following discussion explores how a social worker might go about conducting a needs assessment that accounts for setting, agency resources and characteristics, and the complexity of the problem. The discussion focuses on practical considerations associated with (1) planning the needs assessment, (2) evaluating context, and (3) designing a needs assessment helpful to social workers new to the needs assessment process. This paper does not attempt to develop a theory of human need or propose a new model for investigating need. Instead, described is an adaptable needs assessment process that accounts for local and contextual variables and supports a flexible and nimble response to obstacles that may be encountered.

Planning the Needs Assessment

Conceptualising Needs Assessment

There is no single way to plan or conceptualise a needs assessment. Different starting points, approaches, and foci can each provide useful information for service providers and concerned stakeholders. A starting place for some discussions involves identifying or grounding the needs assessment effort in a relevant conceptual model. Conceptual models can help focus decision-making about tasks such as what questions need to be asked, who needs to be involved, sampling and methods used, and in understanding results. Many conceptual models can be found in the literature, along with examples of how conceptual models have been used in needs assessment design. For instance, Levesque et al. (2010) in designing a needs assessment of family caregivers with an ageing relative at home, based their effort on the User Involvement Model—“a user-focused approach to research developed jointly by practitioners, family caregivers, older people, and community organisations” (p. 878). Other needs assessment efforts have drawn upon different conceptual models such as the community readiness model (Parker, Alcaraz, & Payne, 2011; York, Hahn, Rayens, & Talbert, 2008), the community-based participatory research and gender analysis framework (Nunez, Robertson-James, Reels, Weingartner, & Bungy, 2012), an educational and ecological framework (Green & Kreuter, 2005) and the “precede-proceed” model (Ying et al., 2009).

However, initial interest in a needs assessment and subsequent planning often advance without a well-defined model in hand because of a specific charge or question to a work group (e.g., do our staff need more cultural-diversity training?). Conceptual models like those used in the examples above may be useful in organising the assessment effort, but not all planning efforts are guided by one.

Bradshaw (1977) conceptualised four types of need in his typology that many will find useful. *Normative need* refers to efforts that use experts and their knowledge of research to set standards or define levels of need. *Expressed need* is determined based on an investigation of clients' use of or requests for services. *Felt need* refers to assessment that asks for clients' perspectives and gathers data about their perception or beliefs about what they need. *Comparative need* refers to efforts that examine characteristics of clients in a specific group that is receiving services and then using these data to estimate the extent of need for similar client groups located in other areas. Defining the type of need that is relevant to one's effort early-on will help to ground the planning process and keep decision-making on course. The type of need assessed has implications for what data should be gathered.

Early Planning Issues

Before beginning to create a data collection plan and further explicate the needs assessment process, some initial planning at a practical level must take place. Asked to conduct a needs assessment, several questions may jump to the forefront. It is important to know: How much *time* do I have to complete the project? What is my *budget*? What *agency resources* are available to me? *Why* is the needs assessment needed? *How important* is our project? The answers to these questions will have bearing on the scope of the needs assessment that is undertaken. It is possible that a planning committee following one of the models mentioned earlier could proceed early and logically to Step 3 (taking stock of the resources at hand and the time available) but another group following a different model may not begin discussing those concerns until much later. Because situations and circumstances will vary tremendously, social workers need to recognise the necessity to approach planning in a flexible and dynamic manner. There is no predicting which logistical questions will arise first within the planning team or which will have the greatest implications for the planning process, but it is important to attend to organisational, resource, and other contextual factors from the start of the planning process.

Time

A critical first question that could be asked by a committee member at a planning meeting might be: How much time do we have to complete this assessment? The deadline set for completion of the needs assessment impacts the feasibility and comprehensiveness of the effort. If there is only a small amount of time (e.g., 30–60 days) allotted, then the agency cannot expect an extremely rigorous and comprehensive effort. Indeed, such a close deadline will very likely convince a social worker or planning committee to use quick and abbreviated techniques (e.g., running one small focus group or conducting a brief survey with a small number of clients or staff). Adequate time is required for planning, reviewing literature, weighing various designs, consulting with the stakeholders, and collecting and analysing the data. Time constraints will definitely affect the scope of the project and influence the choice of the assessment design. If the

timeframe is non-negotiable, perhaps the needs assessment team can suggest a two-step approach and consider this effort as a pilot study that can be used to meet immediate goals, provide a beginning understanding of need, but can also later inform a larger, more comprehensive effort.

Project deadlines are a major concern in the needs assessment process, but the amount of time the team leader and other staff involved have to dedicate each day to the needs assessment is also crucial. Temporary reassignment of some duties or overtime for the responsible staff in order to complete the project may be required. If this is not possible and staff members are already overburdened, this may result in their collecting quickly obtained information that is not useful.

Budget

The budget available for the needs assessment influences the final product, especially in situations where time is limited. In situations in which it is determined that staff availability and the allotted timeframe are not adequate, a sufficient budget could support alternative options such as hiring assistance from outside the agency. However, with enough time, limited budgets don't pose a terrible constraint to producing a strong product. Committees can be formed to assist with the project workload and volunteers can be solicited. When budgets or time create obstacles, thinking "outside the box" can be beneficial. For example, a number of years ago Stefl (1984) reported receiving help with a needs assessment from a probation officer who, following established protocol, was able to offer community service to a select group of offenders as an alternative to incarceration. These individuals were screened, trained as interviewers, and completed over 800 telephone interviews in less than a month. This partnership benefited the needs assessment project and provided a reciprocal benefit to the offenders who participated. There may also be organisations or other social service agencies with similar missions, concerns, or populations with which one could partner in most communities to extend personnel and budget and potentially enrich the project.

Another creative alternative would be to partner with a university and work with faculty and students if the project is relevant to their course of study or the work of faculty. A number of articles have been written over the years suggesting what a wonderful idea it is to teach students about needs assessment by engaging them in a "hands-on" learning experience (Anderson, 2002; Hash, Chase, & Rishel, 2012; Jacquez & Ghantous, 2013; Norris & Schwartz, 2009; Timm, Birkenmaier, & Tebb, 2011). Consider those faculty and student resources available at local universities—especially those already involved with engaged research or community service—and ask for assistance. In our experience, faculty have been glad to provide guidance to students involved in such activities, and students have appreciated the opportunity to participate in projects that have real meaning.

Resources

Whether the needs assessment is one conducted by internal or external personnel, one resource that should always be sought would be a key staff person who knows the personnel, the informal leaders and their idiosyncrasies, the agency's policies, and the best way to communicate with staff and receive their feedback. The availability of this knowledge and awareness will assist an agency-based team in its planning efforts while keeping the greater context in mind. Anyone going into a new or unfamiliar agency is likely to make assumptions and, possibly, mistakes. The assistance of a key staff contact

would be of great value in learning about its inner workings and culture to help create a relevant assessment plan. This key contact would also be a valuable resource when vetting issues of time and budget. His or her availability may also need to be negotiated in the interest of moving the project forward as expected.

Initial planning related to resources should also involve thinking about the support resources needed to carry out all phases of the project. For instance, will the data collection design require *administrative support* for mailings or other such tasks or additional space to conduct focus groups or meet with stakeholders? If data will be collected using technology, will there be a need for *technological support*? Will *current staff or practitioner support* be necessary for records reviews or other data collection efforts? Anticipating assistance that might be required and thinking ahead of the step *you think you are on* can also be valuable in the logistical planning process, particularly when discussing the budget and needed support. This may help to avoid problems down the road and unexpected obstacles as the assessment moves forward.

Importance of the Effort

While one hopes that all needs assessments will be useful and highly valued, the importance placed on these efforts may vary. When considering the investment of time, money, and resources, it is also a good idea to ascertain the significance the assessment and its findings will have for the agency. Sometimes needs assessments are implemented in response to mandates that are put in place by funding sources or governmental units as part of an effort to encourage agencies to engage in a systematic planning process. Although desirable, if the funding organisation does not have standards or guidelines about what constitutes a “good” needs assessment, the efforts may result in products that fulfil the mandate but lack usefulness.

On the other hand, if the local board of directors has high expectations for the needs assessment because they will be reallocating funds from one program to another, then the project may be viewed much differently. Most likely there will be interest in developing a needs assessment process that is viewed as thoughtful and fair—one that instils confidence in the results. Although separate, the issues of *time*, *budget*, *resources*, and *importance of the effort* are intricately connected and necessary to address at the front end of a project. They also must be discussed concurrently with design considerations.

Evaluating the Context

Starting with a Specific Concern

Placido and Cecil (2014) posited that needs assessment efforts need to be “anchored first in the organization’s identity [which] includes their mission and vision” (p. 81). To begin to accomplish this, an effort must be made to understand these contextual components of the organisation in relation to the needs assessment. The call for a needs assessment can arise from shifts in the agency’s organisational mission, funding, culture, or policy changes, from organisational downsizing and restructuring, and from response to community trends and priorities (Royse et al., 2009). Such events may require managers and boards of directors to make decisions about the allocation of staff and adjustments to the agency budget to address emerging or changing needs.

The suggestion that a program or agency would benefit from conducting a current needs assessment can originate from different stakeholders. For instance, concerns about

waiting lists or gaps in services can serve as a starting point from which the focus of the needs assessment can be easily identified. Leaders in a community might be concerned about recent events reported in the news (e.g., increased heroin overdoses or low rates of service provided to at-risk youth). Other concerns might include a desire for a larger facility or a location that would improve clients' access to services.

Questions can also arise about the *accessibility* of the agency—do the clients believe that the agency's programs can be easily reached? Similarly, it may be important to know if the clients experience their services as *available* to them. Can they afford services? Are they able to get appointments when needed? A director or manager might want to know to what extent the residents in the area know about the range of services provided and how *aware* they are of what the agency offers. Those responsible for program oversight might want to know if residents consider the agency's services of *acceptable* quality. Needs assessments can also be initiated to identify staff training needs in an agency—especially when there is a plan to provide services to a new client population. Concerns voiced about programing or services provide a good starting place and establish a structural focus.

Once a commitment has been made to conduct a specific type of assessment, other issues may be added by those outside the planning committee. However, too many foci, too many “important” questions to be answered, can confuse the direction of the needs assessment and create a cumbersome process. Should this begin to occur, revisiting its original brief may help the committee get back on track.

Unmasking Values and Hidden Agendas

Almost all agencies articulate a set of agency-wide values and expect their staff to espouse these professional values as well. Core values, along with an agency's mission and goals, greatly influence its decisions and policies. If these values are transparent, agreed upon, and lived day-to-day, they will help to shape a cohesive organisation. However, practically any decision that a board of directors, advisory body, or manager makes has the potential for creating conflict within the organisation, and a needs assessment is no exception. In deliberating about a proposed data collection design, it is possible that previously unstated values become apparent, if not influential, in charting the course of a pending assessment. Policy-makers, administrators, and board members make decisions through the lens of their knowledge and life experiences. For example, those who strongly value a grassroots approach involving opinions of community members or current clients are not likely to support a top-down planning model with no community input.

Decision-makers may also simplify a “wicked problem” and concentrate only on one of its facets, possibly as a result of life experiences or interests. For example, one of the authors once observed a judge serving as a mental health system board member strongly advocate for increased service to the alcohol-abusing population in the community. His strong and spirited declarations about what he thought the community needed greatly lengthened the board's deliberations as they sought diplomatic ways to hear his concerns without committing all of their resources to a single problem in the community. Board members and other decision-makers might require an orientation as to their roles in a needs assessment planning discussion and again after the findings are presented to them.

Practitioners might also be surprised by other organisational dynamics that can affect the needs assessment process. The decisions of boards and administrative teams are not always unanimous or well-considered. Indeed, it is good to keep in mind that service organisations are formed of many components—each organisation has its own culture, cohesiveness, and intellectual capital (Jaskyte, 2012). As Jaskyte (2012) noted, boards of directors differ in their size, diversity, and in the relationships between the executive director and the board and between the board chair and the executive director. These considerations have the ability to affect the trajectory of the needs assessments. Within the decision-making group, there may be a cultural value of encouraging constructive deliberation and respectful disagreement or both of these may be missing. To complicate things further, any perceived leader on the board of directors or in other administrative structures, will have friends within the group and in the community. Political relationships will exist. Some board members or administrative leaders may support even an unpopular issue in exchange for support on another issue.

Anyone planning a needs assessment and presenting the plan to a decision-making group for approval needs to be aware of the potential for the planning process to become debated by those outside the planning group. Should this occur, it might be difficult to resolve the problem of one faction arguing for a particular approach or methodology and another group harshly critical of that approach and insisting upon a different way or emphasis. Working with the executive director and other key leadership positions ahead of major decisions may help the needs assessment to continue to move forward. Similarly, before going too far, staff planning the assessment effort may need to discuss with the director or other appropriate staff the requirements and process for obtaining ethics approval associated with plans to collect data from clients.

Designing the Needs Assessment

The idealistic person charged with planning an agency's needs assessment might start from a perspective of "What would be the best needs assessment for this program/agency/community?" However, as initial planning begins, it is not uncommon for the planning committee to ask: "What can actually be done in this agency/community given the constraints that we'll be under?"

Whenever the planning committee has a reasonable understanding of the four key factors discussed earlier (time, budget, resources, and importance), and the questions or purpose identified, it must then confront the sticky problem of design. Just as there may have been early clues as to who should be included in the sample, ideas about the most appropriate design may also have occurred in discussions at some earlier point. It is possible that a procedure (e.g., personal interviews) could be selected before it is decided whether the target population would be former or current clients.

Quantitatively-oriented committees may prefer large samples and view them as producing greater confidence in the assessment results, but a small budget can negatively affect sample size. Qualitatively-oriented committees may prefer personal interviews and be quite comfortable with small samples. At any rate, design details must be worked out regarding the recruitment and sampling of participants, the questions or instruments to be used, and the actual data collection procedures. Because planning a needs assessment is a complex task, those involved may wish to employ a technique such as storyboarding (Hetherington, 1999) to visually portray the various tasks along the way and the key decisions to be made at each of these points.

Sampling

The prime issue to consider in sampling is *who* should be interviewed or surveyed, and considered a valid respondent. If you have identified the type of need to be explored, that information will help to inform how you think about tasks related to sampling. Such elements as the availability of potential respondents, their relevance to the project, and the size of the potential respondent pool will also help guide these decisions. One could sample only active clients to obtain current knowledge and perceptions of the agency and its services. On the other hand, the decision might be made to contact former clients (although their contact information may not be as available or accurate). A realistic appraisal about accessibility of potential respondents is necessary in order to gather enough data for meaningful results within the time and budget allotted.

Simultaneously, the needs assessment task group must wrestle with the decision of *how* to contact the clients or potential respondents. Most often, convenience samples are used in needs assessments and the sample sizes found in published needs assessments have an extremely wide range. Smith, McCaslin, Chang, Martinez, and McGrew (2010) reported on the needs of older LGBT adults with a sample of 38. West, Williams, Suzukovich, Strangeman, and Novins (2012) conducted 16 focus groups ($n=107$ participants) to assess the health needs of urban Native American youth and their families. On the other hand, de Anda, Franke, and Becerra (2009) constructed a sample of 1784 Latino respondents consisting of 892 parent/adolescent dyads. The ease in locating the target population, their cooperation, the focus of the needs assessment, whether it is quantitative or qualitative in nature, its purpose, and the budget and resources available will all influence the ultimate size of the sample.

Data Collection Methods

Options for structuring the data collection method include qualitative, quantitative, or a combination of the two approaches. The choice of method will be influenced by the factors previously discussed such as sample size and the type of need being explored. For example, it may be that a number of questions about met and unmet needs—or *expressed* need (Bradshaw, 1977)—can be answered retrospectively through a method that involves examining agency records of clients who have used services to determine and categorise their characteristics. On the other hand, assessment of *felt* need may be best assessed by designing a method that involves going directly to the clients or community members themselves.

Identifying the questions that must be answered and the type of data desired will assist in deciding upon the final data collection strategy. Quantitative approaches and surveys are frequently the method of choice for large scale needs assessments. However, qualitative data collection methods, such as individual semistructured interviews (Wong, Mendelsohn, Nyhof-Young, & Bernstein, 2011) or focus groups (Levesque et al., 2010), can be useful in gathering a more detailed and in-depth understanding of participants' perspectives and experiences.

In addition to the issues already discussed, cultural considerations can influence the decision about methodology. Knowledge of the client population and their preferred means of communication and self-expression are important. Use of email or internet surveys may not be a good option for some client populations but could work well for others. The postal service may not be a good option if it is known that the client group

does not return surveys and responses to mailed surveys are expected to be low. If there is enough staff, volunteers, or paid assistants, and time, then the planning group might consider gathering data via methods such as phone calling or designing a qualitative data collection method involving personal interviews or focus groups. If funds are more limited and the sample very accessible (such as the case with current clients), a good option might be to have an agency staff member hand clients questionnaires to fill out as they enter the agency and wait for their appointments. Multiple methods can be used and data can be collected from various stakeholder groups in order to build a comprehensive picture.

Data Collection Measures and Tools

If it is necessary to construct a needs assessment questionnaire, the creation of the items needs careful attention. Questionnaire items are not always understood by the clients or target group in the same way as intended, and one should plan, at a minimum, for the items to be tested for clarity with a small pilot study or reviewed by several colleagues.

Keep in mind that clients may not fully understand clinical jargon and terminology, so this should be avoided. Care should be taken to avoid leading questions, double-barrelled items, and using insensitive or inflammatory words or items that are too vague such as, "When was the last time you saw a social worker?" A useful web-based resource for question developers is *Innovation Network* (n.d.). It is advised that questionnaire items be appropriate for the reading level of the expected recipients. Microsoft Word is able to provide readability statistics, for which Dubay (2004) provided instructions.

The selection of appropriate questions is also important for focus groups and qualitative designs. Turner (2010) provided an excellent tutorial to help individuals become acquainted with personal interviews as a qualitative data collection method. Reviewed are options for structuring interviews, constructing questions, and preparing for and carrying out interviews, among other topics. For some populations and purposes, focus groups may be a better choice for the gathering of qualitative data and open exploration of key issues. Buttram (1990) provided a detailed description of the focus group process and its application to needs.

Planning for the Presentation of Results

When designing the assessment and dissemination of its findings, planners must understand the audience who will be receiving the results, and the importance the audience will ascribe to it. Presenting results can be challenging as stakeholders can include funders, politicians, administrators, community residents, service providers, or staff, as well as representatives of other programs and organisations in the community who make or receive referrals, businesses, and current, past, and potential clients. As Mika (1996) noted, each group of stakeholders can have a different perspective on the program and are likely to interpret results from their own reference point. As the committee plans the methodology, it might want to consider the reception that the assessment could receive from the groups most invested in the results, with specific consideration of those who are perceived to be most influential and most directly impacted by its results.

Conclusion

A number of considerations with bearing on the planning and reporting of a needs assessment have been identified. The main intent of this discussion has been to empower social workers to utilise knowledge regarding the program, agency, or clientele, and start at the point most fitting given the context. This is akin to the well-known maxim in social work of “starting where the client is”. That is, starting with the resources and problems that the client or organisation presents. Approaching a needs assessment as a dynamic and flexible process that can be adjusted and modified as planning committee members, agency staff, and other stakeholders provide input can yield meaningful results to guide service development and social work practice.

Disclosure Statement

No potential conflict of interest was reported by the authors.

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