

Welcome!

**While we wait for
everyone to join...**

**Please respond
to the poll**

Conducting A Needs Assessment

August 20, 2024

Katherine Webb-Martinez, Program Planning and
Evaluation Director

Vikram Koundinya, CE Evaluation Specialist &
Associate Professor of Extension

Irene Padasas, Community Nutrition and Health Advisor,
UCCE Tulare, Kings, Madera & Fresno Counties

 **University of California**
Agriculture and Natural Resources

Agenda

10:00	Welcome & Overview
10:05	How-to Needs Assessment Presentation & UCCE Examples
10:55	Break
11:00	UCCE Academics Share Their Approaches
11:30	Small Group Discussion & Report Out
11:55	Wrap-up & Training Evaluation

Desired Outcomes

Participants gain ...

- Understanding of needs assessments basics (why, what, how, when)
- Basic understanding of how to write good needs assessment questions
- Understanding of how to use the findings to inform how you focus and develop your program
- Feedback on your needs assessment plan

What is Needs Assessment?

- Is the first step in the overall program planning process. It is an essential step in the program planning, development and evaluation cycle (Etling & Thomas, 1995).
- Driven by the question “*What do clients need and how can those needs be met?*” (Patton, 1982).
- One of the first priorities for a new extension educator is to conduct a needs assessment to inform their programming (Caravella, 2006).
- Needs assessment is one of the key educational competencies for extension educators (Ghimire, 2010; Koundinya, 2010).

Needs Assessment Approaches

Asset-based needs assessment

- Identify what is available or potentially available to a community.
- This approach can identify the available organizational, community, fiscal, and individual people skills .

Traditional needs assessment

- Identify what is needed or lacking in a community.

“Asset-based needs assessment is a useful tool when we don’t know enough about both assets and needs in a community”.

(Elhadi, A. F., & Lewis, D. K., 2016)

When to conduct a Needs Assessment?

- The program is brand new.
- You are new to the job.
- You want to learn more about what your clients need related to a specific condition.
- You need to document the needs for funding (Angima et al., 2014)
- You need additional information to communicate with your stakeholders.
- If the program evaluation focus is on how well it meets the needs of the intended audience (Patton, 1982)

Why do it?

Different potential uses

Definitely

- Developing your program: from goal setting to evaluation
- Performance appraisal

Maybe

- Collaborative statewide or regional needs assessment
- Commissioned study
- Journal article
- Justify requests for funding/grants
- Collaborative research project
- Identify partners/community org.collaborators

Benefits of Collaborative Needs Assessment

- Better understanding of needs at a big picture or regional level
- Addressing shared goals more efficiently
- Leveraging subject-matter expertise
- Leveraging limited resources
- Serving as a strategic planning tool for other program areas

UCCE Climate Smart Agriculture (CSA) Educational Needs Assessment

Purpose: Identify the CSA education needs of growers in California. Use needs assessment data for developing CSA education programs for growers.

Methods and sample: Mixed methods (surveys, focus groups, and individual interviews). Survey sent to more than 12,000 farmers, 341 usable sample.

Benefits: Inform extension and research programming of the diverse team, leverage expertise.

Outputs: Journal articles, conference presentations both on the methods and results.

UCCE Dairy Collaborative & Ongoing NA

2017-2019

Purpose: Identify dairy producer needs and how best to direct & deliver UCCE programming

Target audience: CA Grade A dairy producers (list from CDFA)

Benefits: collective expertise leveraged

Outputs: Peer-reviewed journal publication; presentations at meetings

2024-25

Why: CA dairy landscape (# farms, farm size, etc) has shifted so want to update the data to see how needs and desired outreach has changed.

How: Deploying same survey

First steps for new advisors

- Find out what is already known or available
 - Get out and introduce yourself
 - Develop relationships
 - Define your clientele
 - Get the lay of the land
- This informs who and what to ask about needs

Intro Letter

My name is Fadzayi Mashiri, I am the new University of California Cooperative Extension (UCCE) Livestock and Natural Resources Farm Advisor, working in Mariposa, Madera and Merced counties. I am conducting a Needs Assessment to better understand the ranching community's management practices and challenges; and areas you may need more information or research done to improve production and resource management. My goal is to develop extension, educational and research programs that are relevant to your needs and this can only be possible if I get feedback from the community I am serving.

Your responses will be greatly appreciated. Thank you,

Fadzayi

QUESTIONNAIRE

Name _____

- 1) What is your main production enterprise(s) (cow/calf, stocker, sheep, poultry)
- 2) Herd size 50 or less; 50-100; 100-200; 300-400; more than 500
- 3) What are the main problems you deal with on your ranch or property you would want me as Livestock and Natural Resources advisor to focus the extension programs on? E.g. drought, weeds, diseases etc. Please provide some details about the issues.

Best Practices for Community Engagement

- Participatory approach in developing, pre-testing, analyzing, and interpreting questionnaires with members of the community.
- Tell that you are a UC ANR/UCCE person.
- Specify the purpose of the study.
- Discuss how their participation would contribute to improvements in others lives and their society.
- Do not use subordinating language.

Examples of Subordinating Language

“For us to help solve the school problems in your community, it is necessary that you participate in this study.”

Better alternative: *“Will you please be part of helping to solve the school problems in your county? Your responses can assist the county residents and school administrators in fully understanding the issues facing the schools here.”*

Best Practices for Community Engagement contd

- Establish trust.
- Ask for advice.
- Stress that the opportunities to contribute to this study are limited.
- Convey that others are also participating.
- When appropriate, use incentives as social exchange.

How to Organize a Needs Assessment

Phase 1: Exploration

- NA purpose, potential uses, audience, explore secondary data sources, what & how to collect data

Phase 2: Assessment

- Implement the NA plan: collect, analyze, & synthesize data

Phase 3: Utilization

- Use the data to set program priorities, develop action plan to address needs/issues, communicate results

McKillip (1998) and Lepicki and Boggs (2014) as cited in Donaldson and Franck (2016)

Commonly Used Data Collection Methods

For secondary data:

- Literature/Document review

For primary data:

- Individual Interviews
- Group interviews (focus groups)
- Key-informant interviews
- Observation
- Surveys

Considerations given increased virtual methods

Many methods can be done online & could make data collection easier

- Zoom interviews with clientele and partners
- Surveys often already online
- Building on existing meetings - some are now online, e.g. commodity mtgs. and ramped up other online forums (e.g. Dairy Facebook); it is a lot easier to visit virtual meetings

Document/Literature Review

Content analysis of existing information, secondary data

□ Little to no participant burden

Best practices:

- ✓ Have an audit trail
- ✓ Systematic analysis and documentation

Natalie Price,
UCCE Community Nutrition
and Health Advisor

Mixed methods:
**Reviewed county health
improvement plans, health
center community needs
assessments, and relevant
health data and policy reports,**
and informal interviews with ANR
academics and key partners



Individual Interviews

- Personal contact is desirable
- Sample group is smaller
- Sample group is unlikely to respond to a written survey
- Sample has people incapable of taking a survey
- You are not sure what is most important to potential respondents

Best practices

- State the purpose upfront
- Be consistent and neutral
- Use probing questions
- Send questions 1-2 days in advance

**Elizabeth
Fitchner,**
UCCE Farm/Orchard
Systems Advisor

Informal Interviews
piggy backing
on existing meetings



Key-informant interviews

- Verify collected data (e.g.: to understand needs vs wants)
- Get inputs from knowledgeable and influential people
- Explore unanticipated ideas

Best Practices

- Have a mix of people from different ages, races, ethnicities etc.
- ~10 people

Susie Kocher,
UCCE Forestry/ Natural
Resources Advisor

Mixed Methods
including
Key Informant
Interviews



Group Interviews/Focus Groups

- Understand common issues or needs
- Don't know what questions to ask
- Want to know more from survey responses
- Foster trust and relationship-building
- Piggyback off existing meetings

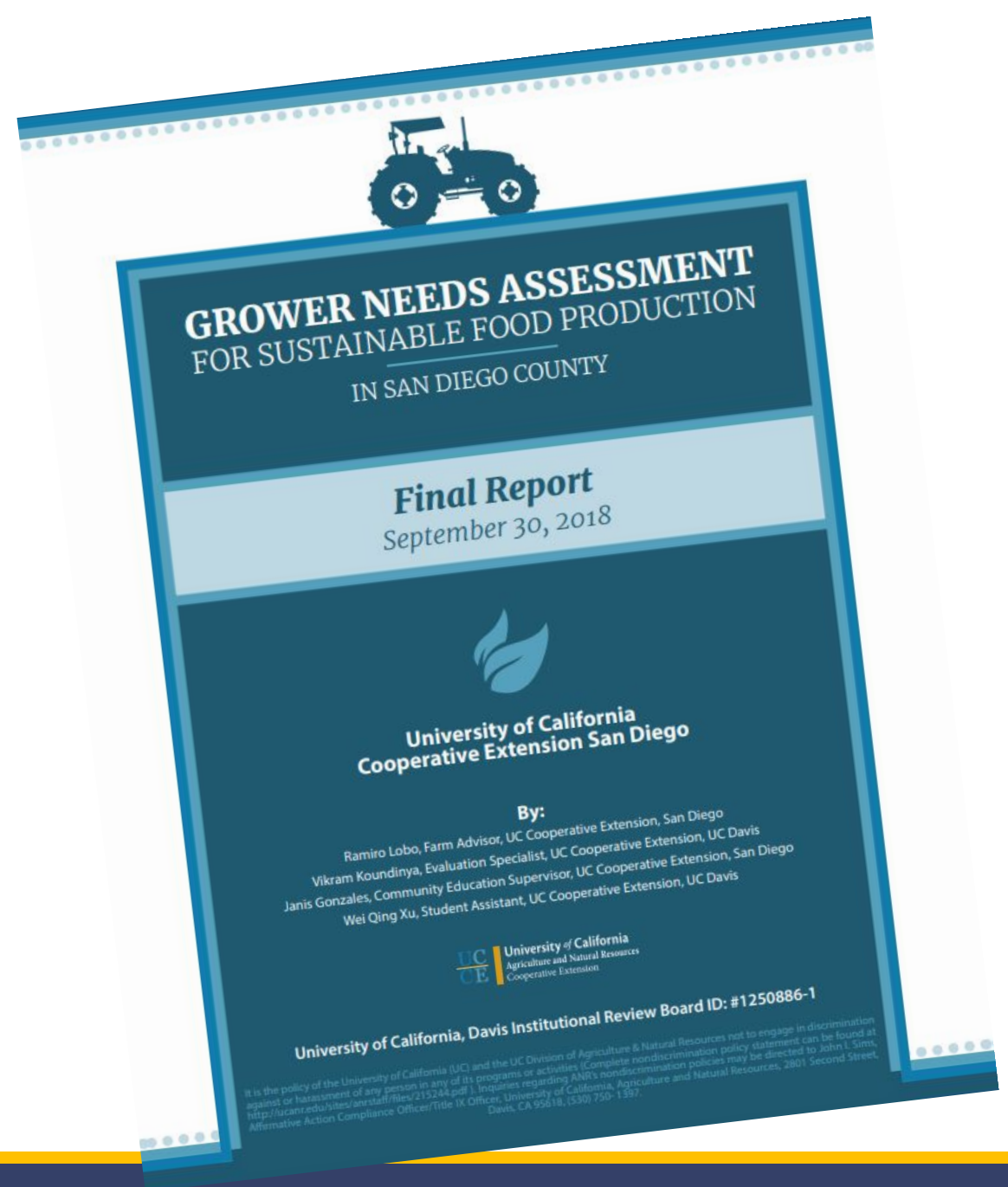
Best Practices

- 6-12 people
- Explain the rules
- Make deliberate efforts to get answers from everyone

Video: <https://www.youtube.com/watch?v=FHcCNufXLsg>

Ramiro Lobo,
UCCE Small Farms & Ag
Economics Advisor & **Jan
Gonzales,** Community
Education Specialist

Mixed methods: Online
survey, In-person interview &
Focus Groups (postponed)



Observation

- Observe practice/behavior
- Want to see and listen
- Confirm fidelity of implementation

Best Practices

- Have an observation guide
- Take field notes

Observation Guide: Elkus Ranch Summer Camp (June 25th – Aug. 26th, 2018)

Adapted from

Klink, J. (2014). *Field Day Observation Guide*. Environmental Resources Center, University of Wisconsin-Extension.

Carlson, S. P., Heimlich, J. E., Storksdieck, M., & Meyer, N. (2009). *Best practices for field days. Assessment tools and observation protocols*. University of Minnesota Extension.

Observation Prompts	Actions You See or Comments You Hear
<p>1) Engagement/Delivery</p> <ul style="list-style-type: none"> a. How are students engaging in the activities? b. What is their body language? 	
<p>2) Learning</p> <ul style="list-style-type: none"> a. Are students expressing what they are learning? b. Is the environment conducive to learning? c. Are students forming new connections? Why? How? 	
<p>3) Staff friendliness & circulation</p> <ul style="list-style-type: none"> a. Warm tone of voice and respectful language b. Attentive and responsive c. One-on-one interactions with every student 	

Surveys

- To collect standardized information from large sample
- Privacy is important or independent opinions and responses are needed
- When there are resource constraints (mainly time and money)

Best practices

- Be clear about the purpose
- Be focused: only ask what you need to
- Establish reliability and validity of the questionnaire
- Follow design principles

**Michelle
Leinfelder- Miles,**
UCCE Farm / Delta
Crops Advisor

Mixed Methods:
Document review,
**Survey using
Clickers** & Informal
Interviews



Culturally Responsive / Cross-Cultural Need Assessment

“cultural competence is an ethical imperative”

“cultural competence is not a state at which one arrives; rather, it is a process of learning, unlearning, and relearning”

- American Evaluation Association (AEA), 2011

Tips

- Work with clientele/partners to develop needs assessment that are culturally responsive and equitable
- We cannot know everything about another culture, but we can continue to ask questions and learn in service of others
- Practice self-reflection
- Secondary data: might miss some marginalized groups; identify and contact organizations working with marginalized groups

Compiled from AEA blogs

Considerations

How might participant characteristics affect your needs assessment?

- Language
- Age
- Abilities
- Male-female interactions, communication styles, decision-making styles, family relationships
- Approaches to knowing and ways of knowing

**Margaret
Lloyd,
UCCE
Small Farms
Advisor**

**On farm
Observation
& Interviews**



Guidelines for Writing Good Questions

1. Do not use abbreviations, slang, or acronyms.
2. Avoid double-barreled questions.
3. Avoid questions that have unstated assumptions.
4. Avoid leading questions that imply a desired response.
5. Avoid questions that may elicit embarrassment, suspicion, or hostility in the respondent.
6. Have mutually exclusive answer options.
7. Have equal variation on both the sides of the rating scale.
8. Ensure that the question stem matches the answer choices.

Writing Questions Group Discussion

1. Research indicates that buying high salt foods is bad for health? Do you buy such foods for your home?

- Yes - No

2. Was your community's input taken and used in developing IPM Extension programs in your county? - Yes - No

3. To what extent do you utilize nutrition information from UC ANR Advisors to inform food purchase decisions?

-Yes - Somewhat - No

Using the Findings to Focus and Develop Your Program

Priority Setting

- You may not ask clientele to prioritize their needs, but even if you do -- clientele priorities are not the only things to be considered...
- You can take a qualitative approach to analyze all that you know using a variety of filters/considerations to help you determine the priorities on which you will focus



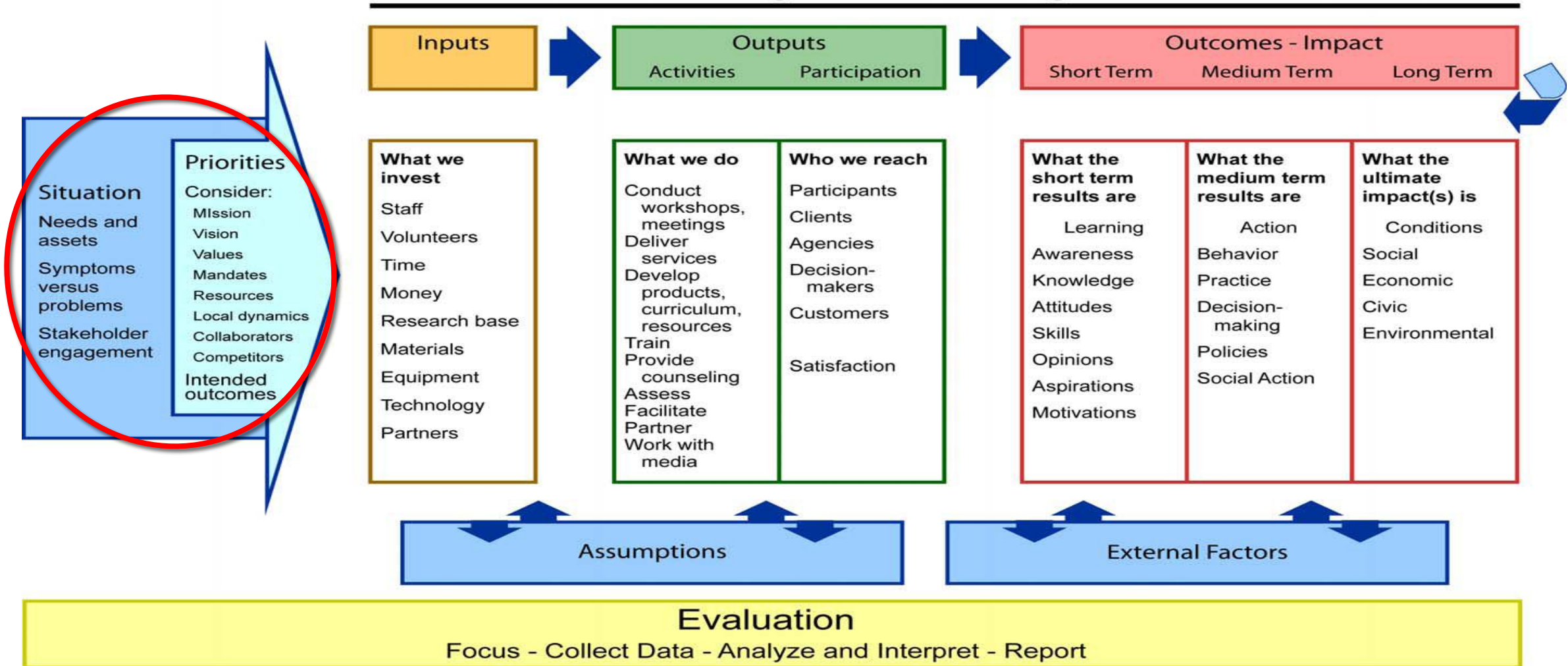
Priority Setting Considerations?

- Individual - job description, expertise, collaborations, resources
- Organization - strategic vision, public values, comparative advantage
- Clientele - what's important to them, extent and frequency of problem
- Likelihood of Impact - What's the state of the science (i.e. is there enough known for you to make progress)? Probability of successful resolution (i.e., probability of an economically feasible solution)

Using Your Needs Assessment Findings

To Develop Focused, Relevant Programs

Program Action - Logic Model



BREAK



UCCE Needs Assessment Speakers

Irene Padasas, Community Nutrition and Health Advisor

UCCE Fresno, Kings, Madera, and Tulare Counties

Grace Woodmansee, Livestock & Natural Resources Advisor

UCCE Siskiyou County



Community Nutrition and Health (CNH)

Needs Assessment

Irene Padasas

UNIVERSITY OF CALIFORNIA
Agriculture and Natural Resources

CNH Advisor Academic Responsibilities

- Onboarded in June 2022
- CNH Advisor for 4 Counties
- Healthy lifestyles, health equity, food, nutrition and water security and safety, and/or climate change
- Local PI for Calfresh, UCCE in Tulare, Kings, Fresno, and Madera
- Program Supervisor for the Expanded Food Nutrition and Education Program (EFNEP)



Needs Assessment Process

- Conducted between September 2022 – May 2023
- Determine research and programmatic gaps align with CNH responsibilities and ANR's public values
- Understand factors/facilitators in improving health and wellness in the communities
- 5 Data Sources: Primary and Secondary Data

Needs Assessment Process

CNH Advisor (Counties)

- US Census Data
- County Health Assessment Reports (Local Public Health Departments)
- Hispanic/Latino Health Beliefs Study (with IRB)

Nutrition Programs (CalFresh and EFNEP)

- Program reach and outcomes in the last 2 fiscal years
- Local staff interviews

Strategies

- Review publicly available data (state and local)
- Review nutrition program data
- Attend community meetings
- Meet with CBOs
- Meet with government agency leaders
- Meet with program staff
- Literature review
- Quantitative data and interview with local leaders largely informed the qualitative interview questions (e.g., gaps, challenges, issues)
- FGD with nutrition program staff
- 4 CBOs helped with participant recruitment
- Interview with research participants



Needs Assessment Findings: Priority Areas



Provide ongoing administrative and programmatic support to UCCE nutrition programs



Provide academic leadership in county-based coalitions and health-focused committees to initiate more policy, systems, and environmental changes in the counties



Expand community partnerships to conduct research and deliver extension-based support with/for local schools, CBOs, government agencies

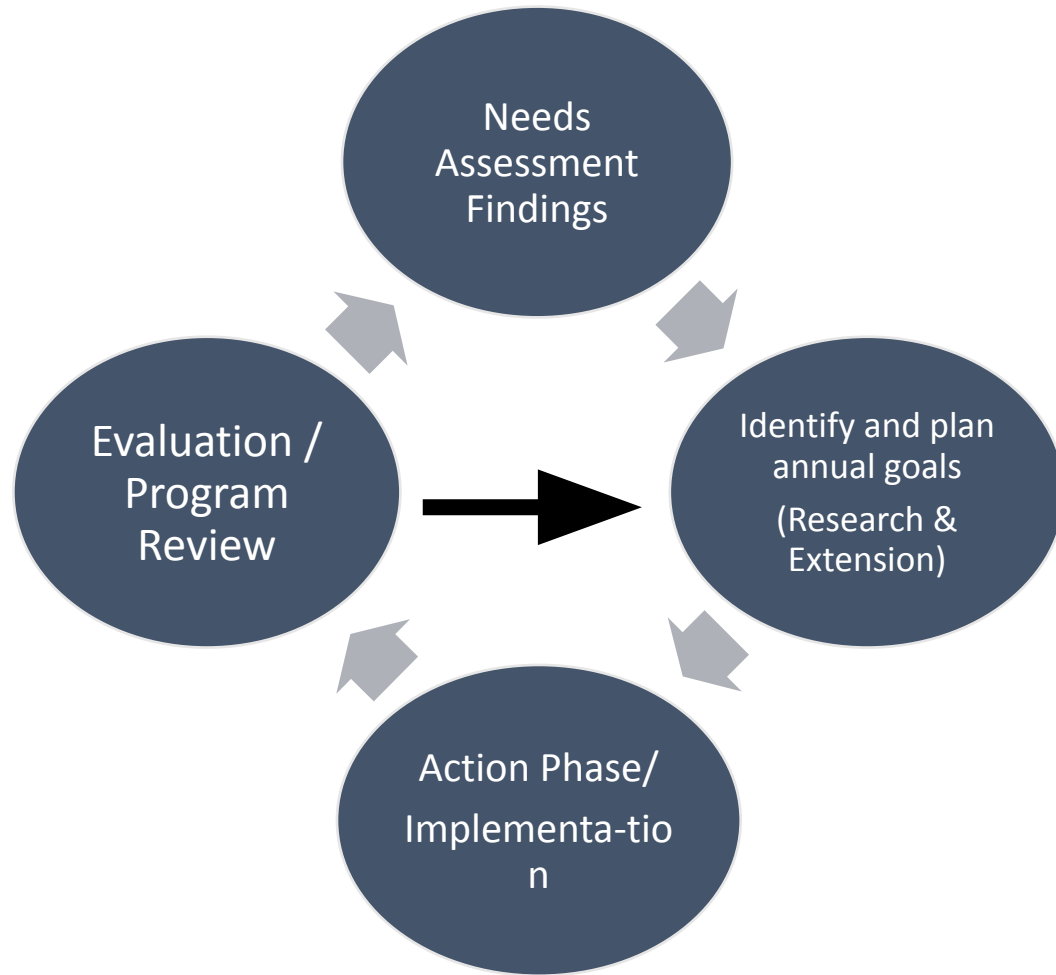


Use indirect education to provide communities with accessible and relevant health information materials

Application of Needs Assessment Findings: Examples

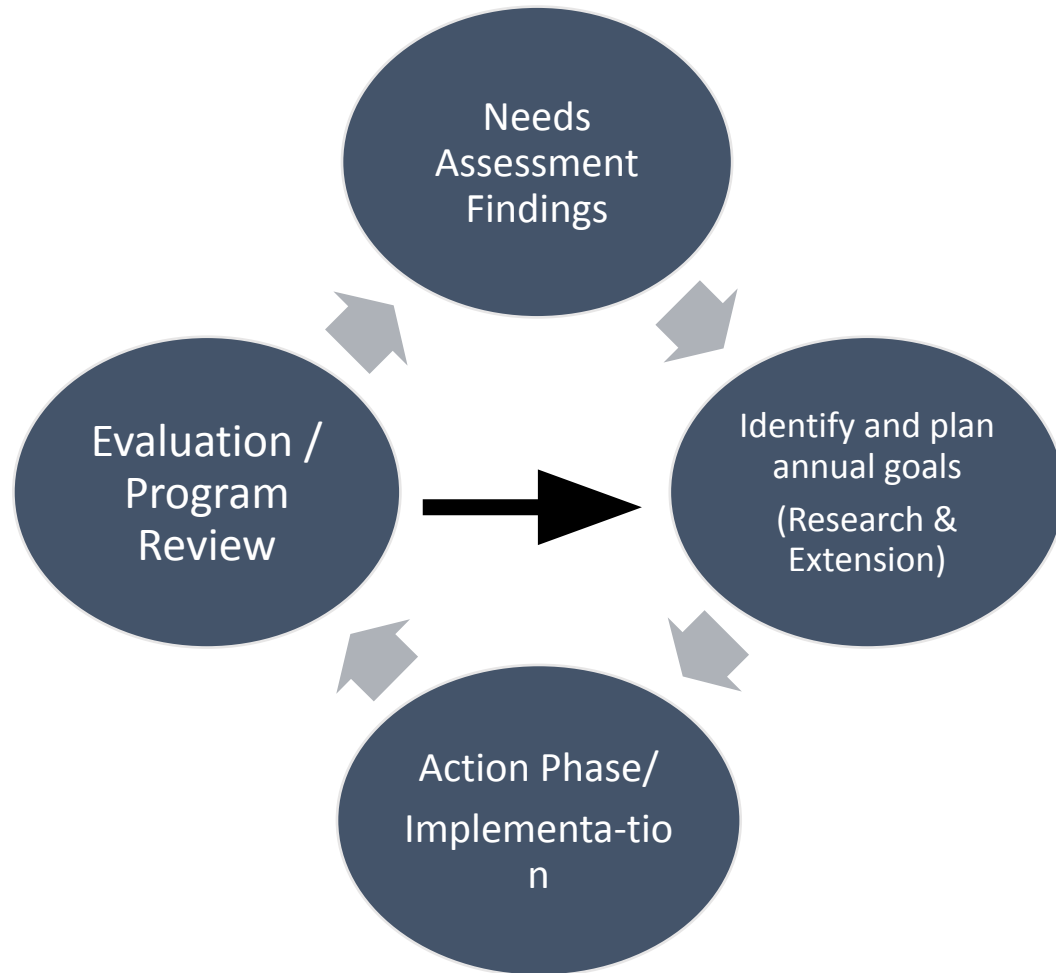
- ✓ Deliver in-house training for nutrition educators
- ✓ Establish MOUs with program sites to ensure consistent programming (e.g., local school district, Tulare Sheriff's Department)
- ✓ Serve in health equity advisory board and steering committees (Local Public Health Departments)
- ✓ Co-chair a coalition for Health Eating and Active Living in Kings County
- ✓ Covid-19 Vaccination Campaign for Indigenous Mexican Communities in the Central Valley
- ✓ Distributed 800 copies of parent handouts on healthy habits and supportive meal style practices
- ✓ Present preliminary findings of the qualitative study to CBOs that assisted in participant

Needs Assessment: Lesson Learned



- Start with readily (credible) available data
- Drives programmatic work: statewide and local
- Process integrated in partnership building
- Collaboration with CBOs can be an opportunity to reinforce the importance of research-informed work/programs in the community

Needs Assessment: Lesson Learned



- It's not always about the gap – identify assets to build on the work

Example:

Committed and passionate nutrition educators

Internal resources – UC MFP & UC MGP

Leverage partnerships

Existing programs in the counties

- Don't rush it!

UCCE Sustainable Natural Resources Example

Grace Woodmansee, Siskiyou County Director and Livestock & Natural Resources Advisor

[Needs Assessment Example](#) (video passcode: hZC8#=kX)



Peer-to-Peer Learning

- *Describe your needs assessment approach, including which data collection method(s) you used/plan to use & why*
- *How will you use the results of your needs assessment?*

Report Out

1. Any *ahas* to share?
2. Any final questions?



Wrap-Up

- Click the training evaluation survey link in the Chat
- Follow-up message will provide links to resources webpage

Thank you!

