Needs Assessment Guide

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# About this Document

This document contains a description and examples of needs assessment in CPD. It is followed by a sample needs assessment survey that can be adapted for your “perceived needs” assessment.

# Definition and Purpose

Needs assessment is used to define the rationale and background for the program.

* Why is this area of interest?
* What is the gap that we are trying to fill?

There are two parts to a needs assessment for Continuing Medical Education

* Unperceived needs
* Perceived needs

## Unperceived (objective) needs

Unperceived needs are gaps between the present situation and optimal care, that a learner does not know exist; when learners do not know what they do not know. They address the gap from the experts’ point of view: what are the problems related to the perceived health issues? For example:

* There may be new developments in the field that should be explained or communicated; or
* There may be specific issues such as challenges in diagnosing certain specific conditions that are very prevalent and have serious implications

Given the areas you wish to investigate the need, choose the methods you wish to use:

* The published literature, syntheses of the literature, guidelines?
* Sources of quantitative data that would provide info about the problems?

Examples can include:

Self-assessment tests

Chart audits

Chart stimulated recall interviews

Direct observation of practice performance

Quality assurance data from hospitals, regions

Standardized patients

Provincial databases

Incident reports

Published literature (RCT, cohort studies)

Other

## Perceived (subjective) needs

Perceived needs address the gap from the learners’ point of view. What are they looking for? What is most important to them and their patients?

* Would a questionnaire or survey for potential attendees provide the kind of info you need?
* Would focus groups?
* Do you suspect that the gaps in best practices exist due to lack of knowledge, skill, a need for change in how the profession deals with something, glitches in the system, communication issues?

Examples can include:

Questionnaire or survey

Course evaluations

Opinion of Planning Committee

Focus groups

Other

## Steps to take

1. Identify the objectives of your survey based on the above
2. Create your needs assessment survey.
3. Below you will find samples of questions that you can use to create a survey for your target learners.
4. You can supplement these questions with topics that are specific to your field, your particular needs.
5. You can delete those questions that are not important to you. (We want to get the information we need but the briefer the survey, the more attractive it will be for those pressed for time.)
6. Submit the survey to the CPD office.

If you have questions or concerns feel free to contact you program planner, or **Robert Parson**, Directeur, Formation et agrément /Director, Education and Accreditation Tel.: 613-798-5555 Ext. / Poste 16879; Email: [rparson@toh.ca](mailto:rparson@toh.ca).

# Examples of Needs Assessment Descriptions

The following are examples of both unperceived and perceived needs.

## Examples of Unperceived Needs

**Remember:** These needs are the gaps between present and optimal care that a learner does not know exist; when learners do not know what they do not know. They address the gap from the experts’ point of view: what are the problems related to the perceived health issues.

**The following are from actual CPD accreditation requests:**

* There is ample evidence in the literature that physicians thrive better and meet career and research goals easier when they have an effective mentor to aid that process. There is also evidence to suggest that in the field of medicine we are often assumed to be good mentors just by virtue of the fact that we are in this apprentice-type of learning environment.
* There is clear evidence for the value of interactivity within formal CPD programs (recent published met analysis). Even small changes in knowledge or attitude that are sometimes acquired during a lecture type presentation tend to be short term and rarely impact medical practices. Although this observation has been clearly established through CPD research, lecture type presentations continue to be the predominant format for a high proportion of CPD programming.
* A panel of Canadian and US family physicians, and … prioritize the (programs) eligible for CME/CPD activities among all reviews available for... The eligibility criteria are: perceived knowledge, competence, or practice gaps, perceived relevance for family physicians, access data (abstract and full-text) to reviews in North America.
* We then built on (previous surveys) by reviewing advances in … by reviewing relevant literature and operational changes that have occurred in .(topic area) in the last year. As well, the current clinical practice guidelines and policy changes to other (topic area) labs within North America were also relevant in deciding on topics for this event.
* A needs assessment survey was sent to the target audience in June 2010 (see attached). The Planning Committee also considered the feedback provided by attendees on speaker evaluations from previous sessions that were held on this topic. (see attached)
* To develop the content of this event we conducted a synthesis of the research literature. The (topic area) research that we intend to present at the … conference is based on themes that were found with a review of current (topic area) research literature. These themes include: …..
* Reviews of scientific literature in (topic area) and clinical practice guidelines (in particular the … guideline) were done. An informal synopsis provided by the Director of the Ontario … was also useful as it provided additional insight into the needs of professionals working in Ontario. We also examined:
* CMPA data
* Implementation of clinical practice guidelines-data
* Performance and competency data –

## Examples of Perceived needs

**Remember:** “The gap from the learners’ point of view”. What are the learners looking for? What is most important to them and their patients?”

**The following are from actual CPD accreditation requests:**

* The scientific planning committee used evaluation forms from previous symposiums as a starting point to develop the content for this year.
* This will be the third time Drs. … have offered this workshop. Each year the evaluation from the previous year provides input for the content and design of the next. ... The presenters … rely on the feedback from participants; requirements for producing accreditable CPD and their own experience in working with Faculty of Medicine presenters.
* The planning committee was guided by the results of a needs assessment, to determine the speakers and topics. An online questionnaire was developed using “Survey Monkey”. Multiple choice and open-ended questions were used to gather demographic information and needs and preferences with respect to the topics, series format, and timing. An email with the survey web link was distributed to our partner agencies, with the request that they distribute broadly within their networks.
* The committee drew heavily upon information provided by the evaluation of last year’s program (6th annual) as well as the results of ongoing clinical research education session evaluations to determine this year’s course outline.
* …created based on the topics identified from the course evaluation forms from the previous six years as well as evaluations from ongoing clinical research education sessions.
* We queried the provincial … society and found that (topic area) is a topic that (specialists) in Canada are hoping to hear at meetings. Based on this data, the following needs were identified and utilized in the creation of this program and its learning objectives…

# Needs Assessment Survey (Perceived) Template

You can use this template as a base for building your own needs assessment survey. Choose what will be useful; delete questions you do not want to use.

## Demographics

**Please check your professional role:**

FP/GP

Resident

Nurse

Nurse Practitioner

Other Healthcare Professional (please specify)

**In what setting do you practice?**

Inner-city group practice

Inner-city solo practice

Urban group practice

Urban solo practice

Rural group practice

Rural solo practice

Other (please specify)

**How long have you been in practice?**

< 1 year

1- 5 years

6 - 10 years

11- 15 years

16 - 20 years

> 21 years

**Year of your undergraduate medical graduation:**\_\_\_\_\_\_\_\_

**Year of completion of your MOST RECENT postgraduate medical training (i.e., residency/internship):**\_\_\_\_\_\_\_

## Specific Content

Use the following types of questions to find out what is of interest to your target audience and identify their learning needs. Choose what will be useful; add elements or topics that are specific to your program; delete questions you do not want to use.

**Please rate your interest in learning more about the following topics related to …** *(insert topics below)*

**In general, what are the most challenging aspects when addressing / performing this topic or procedure…?** *(insert topic(s) below; these are samples)*

* Lack of resources in the community to …
* Lack of referral options for services
* Knowledge of patient management
* Knowledge of … long term outcomes
* Knowledge of physical examination requirements
* Lack of information for patients and their families

**Do you need information on obtaining the resources you need for…** *(insert topics below)*

Or

**How easy is it to get the resources you need for…** *(insert topics below)*

Or

**What are the most challenging resources to access** *(select all that apply) (insert resources below)*

**Is there a problem case in your practice that you would like discussed in a workshop session about …?** Please give a brief synopsis.

**Are there any other specific topics or issues that you would like addressed in the…** *(name of program/conference/update lectures?).* Please list them below.

## Other Possible Questions

Physical exam

**What physical exam skills would you like to have updated? Please indicate all skills that are of interest.** *(insert topics below)*

### Procedural skills

**What skill training would be beneficial to you? Please check all that are of interest**. *(insert topics below)*

### Communications skills

**What communications skills would be helpful to you?**

### Other

* **Are there any other skills that you would like us to demonstrate?**
* **How confident are you in your ability to**…? *(insert topics below)*
* **List any other questions specific to your audience’s needs.**

## Preferred Learning Formats

Choose what will be useful; add elements that work with your program; delete questions you do not want to use.

### Face-to-face formats

**Please rate the importance of the following learning activities for you:**

* Plenary presentations
* Small group sessions (<50 attendees)
* Small group(< 15) case-based presentations
* Blended learning, (some technology and some live elements)
* Brief, didactic presentations
* Interactive workshops
* Simulations
* Expert panels
* Time spent with experts
* Confirmation that I am up-to-date in my clinical practices
* Time spent with colleagues outside of sessions

### Other

* Web-based courses
* Video conferences
* Personal study (self-assessment, practice audit, personal learning projects)
* Other – Please specify

### Location, time, date questions

* Programs that run over several days
* A series of sessions such as biweekly on Saturday morning
* What days of the week are most convenient for you?
* What times in your days are most convenient for you?
* What is your preferred venue?

# Additional resources and references

*Royal College of Physicians and Surgeons of Canada (2014) Identifying the educational needs of the target audience. Available at:*

[CPD activity toolkit - conducting needs assessment](http://www.royalcollege.ca/rcsite/cpd/accreditation/toolkit/cpd-activity-toolkit-needs-assessment-e).

McMaster University Faculty of Health Sciences Continuing Health Sciences Education Program (2009),*Guidebook for Planning and Delivering Continuing Professional Development Programs and Events*, pp. 9-11.

[McMaster CHSE Guidebook](http://www.fhs.mcmaster.ca/conted/documents/CHSE-Guidebook_web.pdf).

We hope you have found this guide useful. If you have comments or suggestions, these are always welcome.

Thanks,

Bob Parson