How do you carry out a needs assessment survey?

A step by step approach

Here's an important point to consider: Most effective community actions start with thought. That thought takes place not in the community, but inside the thinker's head. Needs assessment surveys are no exception. So if you choose to do a survey here are some internal steps you (or your group) should take, and decisions you should make, before any information is collected at all:

Helpful hint: An assessment can be done by one person, acting alone. But generally speaking, a needs assessment survey will be more effective and more useful if it is designed and carried out by a group. This is especially true when no one has special experience in this field. In most needs assessment cases, many heads will usually be better than one. So try to assemble a small group of interested people to help you answer the questions below, make decisions, and carry out the job.

1. Ask yourself: What are my reasons for choosing to do this survey? Why am I getting involved in this? The answers may be immediately clear to you. They may also include many of the reasons previously listed. But perhaps your reasons are not entirely clear. Asking these questions gives you the chance to become clearer.

2. Ask yourself: What are my goals in doing this survey? What do I want to get out of it? How will the results be used? Again, your goals (and uses) may be very apparent; they may also relate to your reasons above. But you ought to be able to state them before you begin.

3. Ask yourself: Am I ready (or, Is my group ready?) to conduct this survey? Am I prepared to do the work that needs to be done, with high-quality effort? Before you begin, make sure your answer is Yes.

Our point of view: These three questions may seem obvious or trivial; but they are neither. Much success in community work, as in life, depends on prior preparation, both technical and mental. The better you are prepared, both technically and mentally, the more effective your work is likely to be.

Now for the more technical side of things. We'll go through them, step by step:

4. Decide how much time do you have to do the survey, from start to finish? How much time can you allow? Your answer will depend upon what is already known; upon the size of your target group; upon the importance involved; and upon the resources you have at your disposal. (How many people can help? How much money is available to spend?)

If nothing is known, the community is large, resources are low, and importance is high, your survey may take considerable time, several months or even more. And properly so. But if the reverse is true, you could complete a good survey in a month or less.
These figures are approximations. We would like to be more specific, but that is hard to do. There is no one universal answer to how much time? A minimum standard might be this:

**Collect enough reliable information from a representative group so that you are sufficiently confident in using that information to guide future action.**

Apply this standard to your own situation. How much time do you think might be involved?

5. Decide: **How many people** are going to be asked? If you are surveying the needs of a small or even medium-sized group, you can (and should) include every single person. But suppose you have a neighborhood of 5,000 people, or a larger community still; you probably will not be able to ask everyone directly.

When the group is larger, you can make your survey available to everyone who wants to answer it. But a more objective technique, which will usually give you more reliable information, is to construct a sample a pre-determined percentage of the total group -- and to ask each member of the sample for their input.

6. Decide **what kinds of people** will be asked? For a smaller group, where you are asking everybody, this question will not arise. But with a larger group, when you are using a sample of the total population, you may want to be sure that certain parts of that population are included. For example, are you assessing community childcare needs? You'd then want to be sure to include parents of young children; and you might also survey or interview that group separately.

7. Decide **what questions** will be asked? These questions will depend upon the scope of the assessment. If you are asking about all possible needs in the community, then phrase your questions accordingly, and allow for a wide range of possible answers. On the other hand, if you are asking only about certain types of needs let's say transportation, or violence prevention then your questions will naturally be geared to transportation or violence prevention issues.

Either way, you have a choice between asking more quantitative, or closed-ended questions, and more qualitative, or open-ended questions. Closed-ended questions involve a choice among fixed alternatives -- you might state your degree of agreement with certain questions, or place your preferences in rank order. Open-ended questions allow more freedom; they give those answering the chance to say anything they want, even though the answers may be less precise. In many cases, your survey can include both types of questions.

8. Decide who will ask the questions? If you do interviews, the more people asking, the more ground you can cover; but the more interviewers will have to be trained. And they will need to be trained to use a standard procedure, so that results don't vary just because the interviewers operated differently. If you use written surveys, this question is less relevant; those who give out and collect the surveys should be thoroughly and uniformly instructed.

And remember: If you can, bring together a group to help you design the actual questions. Your group members will almost always think of good questions and ideas you wouldn't come up with alone.
9. Now that you've answered all the questions above, create a draft of the full survey. (Include the instructions; this is an often-neglected part of survey work, but don't forget it. Your instructions will set the tone for those who will be responding.)

10. Then, try out the survey on a test group. The test group should ideally be composed of the same kinds of people who will be taking the full survey. Why a test group? Because they will let you know if your instructions are clear and if your questions make sense. Even if your survey is perfectly clear to you, it may not be clear to them. You need to find this out before the full survey gets dispersed. Don't bypass this step, your test group is like a trial run, or dress rehearsal, which will help you get rid of the rough spots before you hit the big time.

11. Revise the survey on the basis of your test group feedback. Sometimes this test-and-revision process may need to be repeated more than once.

12. Finally! When you are satisfied that all necessary revisions have been made, administer the survey to the people you have chosen.

13. Tabulate your results. For closed-ended questions, this can be a matter of simple addition. For open-ended questions, you can code the results into categories. What categories to use? Get some feedback from others, because the categories you decide on will shape how you interpret the data which is the next step.

14. Interpret your results. Interpretation goes beyond simple tabulation. It asks the questions: What is the meaning of the results? What are the main patterns that occur? What possible actions do the results point to? It's helpful if a group of people perhaps the same people who carried out the assessment review the results and share their own interpretations. The same numbers can mean different things to different people; some discussion here will clarify the most accurate interpretations to draw.

15. Plan future actions. Now comes the main payoff of your needs assessment survey, and your main reason for having done all this work. Bring the results and interpretations to your full group. Ask, and answer, the question: What should we do now? A good answer may once again take thought and discussion. That comes with the territory. But the key point is that you can now plan and implement future actions with greater confidence that those actions are based upon important needs of the people you want to serve.

There are added benefits here, too.

- The actions you take are more likely to be supported by your group or community.
- Because they are supported, they are more likely to be successful.
- And let's not forget a basic principle of community work -- success attracts resources to your cause. Directly or indirectly, success can lead to more (and more favorable) publicity, to more members, to more dollars coming your way, to a variety of unexpected happy opportunities.
And many of those benefits might be traced back to your assessment. Aren't you glad you listened to that stranger who said, Have you done a needs assessment survey?

Now, all that is left for you to do is:

16. Implement your actions. Which of course is the reason we do these surveys in the first place. The results are there to be used for action; and your group should have already agreed to use them, going back to the beginning.

Now you really are ready to act. But this is a topic for another section.

And finally, later on:

17. Repeat your assessment. Not right now, but at some point down the road. If a physical check-up for yourself is a good idea, so might be a check-up for the community, maybe every two years or so. Community needs can change; you want to be sure you know if, when, how, and why they do. For needs assessment is really an ongoing process just like community action itself.

Community needs or community assets?

We've taken some time to talk about community needs, since knowing them is basic to good community development work. But despite their importance, needs are just part of the picture. The other part, at least as basic, is community assets -- the skills, interests, capacities, and other resources that can be found in any community. Those assets ought to be identified, just as thoroughly as needs. That is the topic of the next Tool Box section.

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