NEEDS ASSESSMENT AND TRAINING NEEDS ANALYSIS CHECKLIST

The need for training is often driven by a recognized gap, which is the difference between the way things are and the ways they could be improved. However, training is not always the solution, and it's important to find out what is causing the gap to identify the best solution. As you explore these solutions you will see that need assessment is a form of evaluation, and some of these resources will link to evaluation tools.

Use this checklist to guide you through the needs assessment steps to determine if training is needed to address a gap and gather information for your training development plan. Adapt the checklist to suit your specific project. If you determine that training is the solution, then use the tools on the Training Development site to help you create effective training.

1 Plan for needs assessment.

Define the goal of the needs assessment in relation to your program's goal.

Describe the gap(s) by identifying the program goals or outcomes that are not currently occurring. Focus on understanding the current situation, not solutions.

Identify decision makers or partners who will use the needs assessment and how.

Establish and engage with stakeholders (partners) that include representatives of the learner audience.

Plan to provide updates to your partners throughout the needs assessment process.

Develop questions you want the assessment to answer about your program that will identify the source of the public health or organizational gap.

2 Collect data and information needed to answer the assessment questions and to help find the source of the performance gap.

Identify existing data or scientific literature about the gap(s).

Conduct an environmental scan, if needed. Existing data and results from an environmental scan might be sufficient to answer assessment questions or to find gap sources.

Identify who can provide information about the gap(s).

Select the best methods (e.g., existing data review, interviews, surveys, or focus groups) to collect information about the gap(s). If you are creating new data collection tools, allow time and resources to pilot test with the intended audience. Evaluation questions may include questions about the gap source and what is needed to close the gap.

Closing the gap might include the following elements:

» Policy changes

» Change in the work environment

» Leadership

» Communication

» Attitude change

» Knowledge

» Skill(s) and Behavior

Use data collection tools to answer your evaluation questions.

Collect data from people, if needed.

3 Analyze the data to determine why a performance gap exists.

If your findings show a need for a change in knowledge, skills, or behavior then you have a performance gap that training can help address. Different solutions might be available, such as changes in policy, technology, organization, or standard operating procedures. Your analysis will help you learn if training is a solution that can address the gap.

Identify specific gaps in knowledge, skills, or behavior.

Describe potential gap causes, in terms of both people and systems.

Set criteria for identifying possible solutions to close the gap.

Evaluate context (e.g., existing resources and lessons learned from past efforts).

Identify barriers and facilitators for training delivery to ensure inclusion and accessibility (e.g., language, technology, or location).

Collaborate with partners to decide on potential solutions.

If training is part of the solution, conduct a training needs analysis.

4 Conduct a training needs analysis if training is needed.

If a performance gap exists, then you will want to identify what your organization will need to provide training to your audience. Conduct a training needs analysis by identifying the "who," "what," "when," and "where" specifically for developing training. The "who" is the job performer and is often referred to as the learner. Your training needs analysis may include additional information collection and should help as follows.

Clarify expected learning outcome(s) or the training goal with decision makers or partners.

Describe the learners. This information comes from a learner analysis. The data are collected separately from step 2, and it will help you gather specific information about your learners, which includes the following.

» Characteristics of the learners (e.g., demographics or role in the organization).

» Barriers and facilitators that affect your learners' performance (e.g., language, technology, or location).

» Learners' training preferences (e.g., formats, timing, or current sources of learning).

» Learners' educational and reading levels.

List critical competencies to address in the training, if relevant.

Assess opportunities to build trust, engage, and advance equity through training.

List and review trainings that already exist.

» Determine if these trainings meet CDC Quality Training Standards.

» Review training evaluations and determine if the current trainings meet the needs of the learners and address the performance gap.

If no trainings exist, conduct a content analysis to identify, focus, and organize the potential training content for best learning. Describe what is needed to create new training that includes the following:

» Source(s) for the content,

» Organizational constraints (e.g., budget and time), and

» Available resources for creating or delivering training.

5 Review and interpret findings to identify possible training solutions.

In the training needs analysis step, you collected the information needed to address the organization, learners, and current resources and capacity for addressing the performance gap. In this step the information is reviewed, analyzed and prioritized with input from partners. Your review and interpretation will provide context for developing recommended training solutions.

Engage partners to strengthen the relevance of conclusions and recommendations.

Consider strategies to make content and delivery methods appropriate for learners and their settings.

Prioritize which training solutions to implement based on your organization's long-term goals and resources.

6 Summarize and make recommendations.

After conducting your needs assessment and training needs analysis, analyze the results, make recommendations, and write a report. Share and discuss the report with key partners to determine next steps. Include the following information in your report.

The goal of the needs assessment and background for context.

The evaluation questions that the needs assessment was designed to answer.

The methods for collecting, analyzing, and interpreting data.

A summary and findings of the data collected.

Your recommendations, including:

» how to develop the training;

» which technical topics to cover;

» the primary learning audience; and

» what learning methods will best serve the audience.