How to Perform a Needs Assessment – Quick Guide

1. What is the purpose of the assessment?
    a. Examine the entire organization, one department, one crew?
    b. Is there an identifiable issue that we are trying to solve?
2. How are we going to get the information we need for our assessment?
    a. Monitoring, QCI, work orders, interviews, focus groups, networking?
3. Who will perform our needs assessment work?
    a. Assigned representative staff (assessment team), management, outside consultants?
4. Where is our organization/staff deficient? What are we doing right?
    a. Monitoring, QCI, work orders, interviews, focus groups, networking?
    b. Client, staff, or management feedback?
    c. DOE, grantee, or subgrantee feedback?
    d. Training center feedback?
    e. Do we have a problem with our organizational culture?
5. How will we measure, organize, and prioritize our results? How will we define success?
    a. Production increase?
    b. Monitoring, QCI, energy audits?
    c. Dollars expended?
    d. Focus on poor performing subgrantees, crews, or individuals?
    e. Prioritize by staff morale, organizational culture, monitoring/QCI results, finances?
6. Who will develop an action plan?
    a. Assessment team, management, outside consultant?
7. Who will write our report? Who is the audience?
    a. Writers – assessment team, management, outside consultant?
    b. Audience – entire organization, department, board, funder?
8. How will we manage/implement our results and plan?
    a. Assessment team, management, outside consultant?
    b. Should we develop a timeline for implementation?
    c. How will we determine if our efforts were successful