A Guide to Performing Needs Assessments

Methods to Identify Perceived and Unperceived Learning Needs Standard

Conducting a needs assessment is the critical first step in the CPD activity planning *process. All accredited CPD activities must be planned based on the learning needs that were identified from a needs assessment.*

The Royal College Accreditation Standards outline the following:

a) CPD developers must perform a needs assessment to identify the target audience's perceived and/or unperceived learning needs.

b) The needs identified through the needs assessment must inform the:
   o Learning objectives
   o Most appropriate learning format to address these learning needs and objectives
   o Selection of content
   o Suitable evaluation strategies that assess whether the learning objectives were met

c) Activities should address learning needs across one or more of the other CanMEDS roles beyond the 'Medical Expert' role. Therefore, the needs assessment should actively seek to identify educational needs across the different CanMEDS roles.

d) There is no expiration date or shelf life for needs assessment data. It is the responsibility of the Scientific Planning Committee to validate that the needs assessment data remains current and relevant.

A needs assessment is a set of tools and processes used to collect information about the target audience's learning needs. These learning needs can include gaps in the target audience's knowledge, skills, performance, and/or health outcomes that need to be addressed or improved.

A needs assessment strategy can use multiple sources and/or methods to collect data about the target audience's learning needs: both perceived and unperceived.

Perceived learning needs are those that members of the target audience are aware of. These are the gaps that learners will report that they need and/or want to improve. Methods for identifying *perceived* learning needs include:

- Collecting subjective data through methods such as:
  o Consultation with scientific planning committee (SPC) members
  o Direct requests from the target audience
  o Surveys
  o Focus groups
- Collecting objective data such as:
  o Literature reviews
  o Clinical practice guidelines
  o Information about changes and trends in practice

Unperceived / misperceived learning needs are those that members of the target audience are not aware of. Your target audience will not report these gaps when asked. You will therefore need to look to alternative methods for identifying these learning needs. Methods for identifying *unperceived* learning needs include:

- Collecting subjective data through methods such as:
  - Observation of performance (either in practice or simulation), with attention to how learner(s) are currently performing tasks and how this compares to practice standards or expectations
  - Patient and/or simulated patient feedback
- Collecting objective data such as:
  - Results of self-assessment tests
  - Quality assurance data
  - Patient data sources, including: safety incident reports, critical incident reports, chart audits
  - Published literature
  - Information about changes and trends in practice

AREAS OF LEARNING

CPD developers should provide their target audience with opportunities to develop their capacity across different areas. Your needs assessment should therefore aim to identify perceived and/or unperceived learning needs across two or more of the areas listed below:

- Clinical knowledge and skills, which also includes the knowledge and skills required for contributions to health care quality, patient safety, and patient-centeredness
- Communication and relationship-building with patients and families
- Collaboration with other health care professions, community care providers, patients and families, and others in care, administration, education, advocacy, and research
- Leadership in contributing to improvements at the personal practice, team, organizational, and system level
- Advocacy for change that addresses patient needs, important health issues, and determinants of health and that supports health promotion and disease prevention
- Scholarship, including:
  - Teaching and learning: Planning for and engaging in lifelong learning, developing learning opportunities, and teaching others
  - Engagement in research: Creating, evaluating, and disseminating research and translating research into practice
- Professionalism, including:
  - Adherence to best practices and ethical standards
  - Contribution to social accountability and the public good
  - Engagement in self-reflection for self-awareness
  - Support of self and colleagues

IMPORTANT CONSIDERATIONS

- When conducting a needs assessment, other questions to consider are:
  - Why should a learning need be addressed or improved?
  - What result / outcome / impact will be achieved by addressing the learning need?
  - Which of the identified learning needs should be prioritized?
- SPC members who are representative of the target audience will have extensive knowledge of the target audience's learning needs. Therefore, the expertise of the SPC is an acceptable form of needs assessment. However, it is recommended that the SPC's expertise be accompanied by other data sources and methods such as surveys, performance data, evaluation reports, or another source of objective data.
- Surveys are one of the above methods that are commonly used.
  - Surveys are useful for identifying *perceived learning needs*. Responses from different professional groups can be compared to identify any perceived learning needs that are common across professions.
  - Surveys are also useful for identifying *unperceived learning needs*. A survey to your target audience can be paired with a similar survey to patients. The results from your target audience and patient groups can then be compared to determine any unperceived learning needs.
  - Additional tips on developing and delivering needs assessment surveys are included below.

Needs Assessments: Surveys

- Clearly define the purpose of your needs assessment right from the outset. Be as specific as possible. This will guide you as you develop your needs assessment. The purpose could be one of the following:
  - Identify whether the target audience is interested in the topic
  - Define competencies and learning objectives
  - Verify competencies and learning objectives
  - Identify any gap(s) in current practice based on an existing framework / best practice
- Keep your survey short
  - Consider the goal and usefulness of <u>each</u> question in the survey and how you will action the data that you receive from it. Consider removing the question if you find that you cannot articulate the goal, usefulness, and plans to action the data.
  - Keep all question stems concise. If additional context is needed, consider adding a preamble that provides added detail without distracting from the core question.

- All wording should be concise, consistent and easy-to-understand
  - Run your survey by people unfamiliar with the subject matter to ensure that you are not making any assumptions about your survey respondents' knowledge.
  - Determine the language you will use and use it consistently throughout the whole tool
  - Include specific definitions of any key terms at the start of your survey
- Include a carefully articulated and purposeful introduction within the survey and e-mail (if distributing the survey by e-mail)

- Identify your target audience and the groups that are representative of your target audience. Then think about contacts within your network (direct or indirect) who have a connection to those groups. A group is more likely to respond to a survey from someone who they know. Ask these contact(s) to disseminate the survey to the group(s).
  - The CPD developer should write the introduction contained within the actual survey. However, the contact disseminating the survey should write the e-mail (as they are most familiar with the group's working and communication style).
- Monitor response rates: Disseminate the survey a second time and extend the time window of your survey if the response rate seems low.
- Consider your questions in the context of each group that you are surveying: Ensure that all questions and wording are still appropriate for each group or whether any question(s) should be edited or removed

Suggested Resources:

1. UHN Competencies for Teaching
2. 12 Tips for Education Needs Assessments through an Interprofessional Lens (University of Toronto)
1. Centre for Interprofessional Education)
2. CPD Planning Template (Royal College of Physicians and Surgeons of Canada)
3. Needs Assessment and Grand Rounds: How to Do It (Jocelyn Lockyer)
4. Needs assessment: Issues, methods, research and future directions. *The Journal of Continuing*
5. *Education in the Health Professions, Vol. 18-3*