

# Using Needs Assessment Strategies for Effective Workshops

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## INTRODUCTION

For many instructional developers the following situation is probably not an unusual one:

You have just received a telephone call from a department chairperson you do not know very well. She tells you she is responsible for organizing a professional development workshop for her faculty. The "preparation of instructional objectives" was chosen as the topic for the workshop. The chairperson states that you were recommended to conduct the workshop. You decide to accept the invitation because you see an opportunity to work with a new group of faculty members. Your task now is to plan the workshop.

Instructional developers are frequently asked to conduct workshops for a variety of different audiences. Workshop requests may be accepted before developers have a clear understanding of the audience and exactly what the audience needs to know about the topic. Attempting to conduct workshops without initially obtaining such information can be disastrous for both the instructional developer and the workshop audience. This training module will apply some of the concepts from needs assessment to the planning of effective workshops. Several strategies will be suggested for conducting a workshop needs assessment within the practical constraints of limited time and resources.

At the completion of this training module, the reader should be able to:

- Explain the consequences of not conducting a workshop needs assessment
- Identify initial information to be collected before accepting a workshop request
- Explain the different strategies for conducting a workshop needs assessment
- Formulate needs assessment questions that obtain information useful for workshop planning
- State the criteria for selecting a workshop needs assessment strategy

## Why Assess Workshop Needs?

There are a number of options available to instructional developers for determining the learning needs of a workshop audience. The easiest option is to ignore assessment of learning needs altogether and plan the workshop based upon personal beliefs and assumptions about the audience. While this may be the easiest option, it is probably not a wise one because it may create a variety of problems. Specifically, the consequences of *not* assessing the learning needs of a workshop audience include:

- Giving the audience information they already have
- Giving the audience information they cannot use
- Not meeting the audience's expectations for the workshop
- Misjudging the importance of the workshop topic to the audience

In other words, there is a high likelihood that failing to conduct any form of a workshop needs assessment will result in errors that may be costly to the instructional developer and the audience. Conversely, few developers have time to design and implement the formal needs assessment procedures typically referenced in journals and textbooks. Somewhere between the extremes of doing nothing and conducting a formal and exhaustive needs assessment is a point that represents a reasonable effort on the part of the developer to determine the content and strategies of the workshop.

In the sections that follow, a variety of different workshop needs assessment strategies will be suggested. Decisions regarding what strategies to use and what questions to ask will depend upon the nature of the workshop, the audience, and the developer's familiarity with each. Some strategies will clearly require more effort than others; however, any one strategy is better than doing nothing at all.

## Initial Needs Assessment Checklist

From the initial telephone call requesting the workshop, instructional developers can begin collecting information

for workshop planning. By having a brief checklist easily accessible, the developer can begin asking fundamental questions to help determine whether the workshop request is reasonable and to help make subsequent workshop planning less tedious. The checklist shown in Figure 1 is but one example. Such checklists will be most helpful when the questions are tailor-made by the developer.

By using the Initial Checklist, the developer can make an informed decision about whether or not to accept the workshop request. Also, by completing the checklist, the developer has already collected information that will be helpful in planning the workshop.

**Instructions:** Obtain answers to the following questions during the initial workshop request and before agreeing to conduct the workshop.

1. Who is making the workshop request?  
(Relationship to audience?)
2. What is the purpose of the workshop?  
(Use the respondent's words.)
3. Who is the potential audience?
  - a. Is their attendance voluntary?
  - b. How many will attend?
  - c. What are the duties and backgrounds of the audience?
4. What are the audience's expectations for the workshop?
  - a. To be informed?
  - b. To be motivated?
  - c. To be skilled?
5. How much time is available for the workshop?
6. Where will the workshop be held?
7. What are the telephone number of individuals who will be attending the workshop?

Figure 1. Initial Checklist.

### Workshop Needs Assessment Strategies

Assuming the workshop request has been accepted, the next step for planning effective workshops is to amplify and confirm the information obtained from the Initial Checklist. Given the constraints of time and resources, what are the different strategies instructional developers can use to collect this vital information? Eight different workshop needs assessment strategies are presented below. Each strategy may be used singly or in combination with other strategies. Also, remember that each strategy can be used not only with the workshop audience, but also with the audience's superiors and subordinates to confirm information. The workshop needs assessment strategies are:

1. **Personal Interview**—Prepare a series of questions about the workshop and interview a sample of the potential audience. Ask the audience what they see as their needs, what they know about the topic, what they would like to etc.
2. **Telephone Interview**—Similar to the personal interview; prepare a series of questions and telephone a sample of the audience.

3. **Written Questionnaire**—Have the workshop audience complete a brief written questionnaire with in depth responses to needs assessment questions.

4. **Preworkshop Letter**—Send the workshop audience a letter which describes the tentative goals, agenda, and strategies of the workshop. Request their feedback on the importance and relevance of the workshop plan.

5. **Observation**—For some workshop topics, it is possible to observe members of the audience performing a job-related skill. Also, it may be possible to observe products developed by the audience to determine their mastery of the topic.

6. **Interview Past Presenters**—Valuable information about the audience may be obtained by interviewing someone who has previously conducted a workshop for this audience.

7. **Talk to Early Arrivers**—By talking with those members of the audience who arrive early, it may be possible to conduct a "mini-interview" to determine their problems, needs, and motivations for attending the workshop.

8. **Problem Posting**—If it is impossible to contact the audience prior to the workshop, begin the workshop by asking the audience to identify their problems related to the topic, and the questions they would like to have answered during the workshop.

If after collecting the workshop needs assessment information, there is still some confusion over what exactly the workshop should address, proceed carefully. Recognize that the person requesting the workshop may represent one view of what is needed. Others, such as the workshop participants, may have entirely different perspectives. Also, the persons contacted may have been expressing their wants instead of their needs. In such cases, it may be necessary to collect additional information from other sources, or use additional needs assessment strategies. This process can be continued until the instructional developer feels sufficient information has been collected to conduct an effective workshop.

### PRACTICE EXERCISE 1: SELECTING STRATEGIES

**Situation:**

Assume you have agreed to conduct the workshop on "instructional objectives" described earlier in this module. From your Initial Checklist, you know the workshop will be given 2 weeks from today. There are 30 faculty members in the department, all are currently teaching undergraduate or graduate classes. Some of the faculty have developed objectives for their courses and some have not. The workshop is scheduled to last 3 hours. You have a limited amount of time between today and the workshop to assess the learning needs of the audience.

**Task:**

1. Using the list of different needs assessment strategies, identify which strategy or strategies you would use to prepare for this workshop.
2. List each strategy you would use and who you would contact.

After you finish, compare your responses with the solution presented at the end of this module.

## Formulating Needs Assessment Questions

Many of the workshop needs assessment strategies presented in the previous section depend upon posing questions to individuals. The way these questions are formulated may greatly influence the type of information obtained. For example, consider the following two questions:

1. "Do you understand what 'enabling objectives' are?"
2. "What does 'enabling objectives' mean to you?"

There are several critical differences between these two questions. The first question is called a closed-ended question because it requires only a single-word answer. While this format allows an easy response (from the person being interviewed), it will not always provide the instructional developer with information crucial for workshop planning. First, many people would hesitate to answer "no" to the first question because they might appear to be ignorant (resulting in a deceptively high number of "yes" answers). Second, whatever a person answers, there is no certainty that the answer is valid because the judgment is made by the person responding and not the developer. That is, individuals may honestly believe they know what "enabling objectives" are; however, they may be totally incorrect.

The second question is considered an open-ended question because the respondent is free to answer in any way believed appropriate. It is more difficult to summarize the results of open-ended questions; however, such questions have several advantages over closed questions. Because the open-ended question requires the respondents to answer in their own words, a great deal can be learned from how a person answers the question. For example, if an individual responds with a "textbook" answer, he or she probably has a high level of knowledge about the subject matter or has encountered the topic. Conversely, someone who answers with a popular though incorrect response probably has been exposed to the topic but is misinformed. Another advantage of open-ended questions is that an attitude can often be inferred from the answer. That is, if a member of the workshop audience answered, "I don't really care what enabling objectives are," the developer could easily predict that person's attitude toward the workshop topic.

The following are general guidelines for developing better questions when collecting needs assessment information:

1. Be specific and clear about the information to be obtained from the question. Is understanding of the topic being assessed? Prerequisite knowledge? Attitudes? Expectations?
2. Ask only questions that will actually be used to help plan the workshop. It may appear necessary to ask certain questions, but if the responses will not influence the content or strategies selected for the workshop, such questions are really a waste of time for the developer and the respondent.
3. After the questions have been drafted, try them out on a person whose background is similar to the workshop audience's. Sometimes a question may not be asking what is intended.
4. Eliminate all unnecessary professional jargon.
5. Limit each question to one main point.

## PRACTICE EXERCISE 2 FORMULATING QUESTIONS

### Situation:

For the workshop on "instructional objectives," you have chosen the telephone interview as one needs assessment strategy. You are now preparing the questions you will use when you telephone a sample of the departmental faculty.

### Task:

1. Write three questions you would ask to obtain the following information:
  - a. The faculty's knowledge or experience with the workshop topic
  - b. The faculty's attitude toward the topic
  - c. The faculty's expectations for the workshop
2. Use these guidelines to assess your questions:
  - a. Does the question yield information that is usable for workshop planning?
  - b. Does the question really ask what is intended?
  - c. Does the faculty member have the information necessary to answer the question?

After you finish, compare your responses with the solution presented at the end of this module.

## Selecting Needs Assessment Strategies

With so many different needs assessment strategies available, how does the instructional developer decide which strategies to use, and where to stop? The selection of appropriate workshop needs assessment strategies can be determined by answering the following questions:

1. How confident must I be of knowing the learning needs of the audience? If the workshop topic or audience is unfamiliar, it may be necessary to use several strategies and collect information from different sources to confidently assess the audience's learning needs. Conversely, for audiences familiar to the developer, the need for in-depth information may not be as great. As the need for confidence increases, so should the number of needs assessment strategies and the different sources of information.

2. How much time do I have? The amount of time between the workshop request and the actual workshop may determine the available needs assessment strategies. Some strategies, such as the written questionnaire, observation, and the personal interview, require a great deal of time to complete and analyze. Other strategies may not yield as much in-depth information, but they can be quickly and easily completed by the developer.

3. How can I get the most information with the least amount of effort? Certain needs assessment strategies, such as the written questionnaire, can be administered and tabulated by others. Depending upon the availability of resources and support personnel, it may be possible to select needs assessment strategies to obtain the necessary information without a great deal of personal effort.

Assessing the learning needs of a workshop audience is not an end in itself. Rather, it is a means to an end. By asking these three questions, it should be possible to select the appropriate needs assessment strategies and sources of information to design effective workshops.

### PRACTICE EXERCISE 3 APPLYING THE CONCEPTS

#### Situation:

Several months ago, you submitted a proposal to your professional association to conduct a training workshop on "designing instructional simulations" at the association's annual meeting. The professional association accepted your proposal. The association's program committee tells you you have 3 hours to conduct the workshop and that 17 people from across the country are enrolled. You have been allocated \$50.00 to cover the costs of preparing materials and conducting the workshop, which will be conducted 6 weeks from today.

#### Task:

Using the information presented in this training module and your own experiences, complete the following tasks:

1. Identify the needs assessment strategies you would select to prepare for this workshop.
2. Categorize the strategies into areas you could conduct before the workshop and during the workshop.
3. Identify the different sources of needs assessment information.

After you finish, compare your responses with the solution presented at the end of the module.

#### Summary

- Although a workshop needs assessment does take time, the alternative of doing nothing creates a high risk of serious and costly errors.
- It is possible to begin a workshop needs assessment from the first contact by using the Initial Checklist.
- The workshop needs assessment may use a variety of different strategies, depending upon the purpose of the workshop and the constraints upon the developer. Further, using more than one needs assessment strategy will help determine the accuracy of the information.
- The way needs assessment questions are asked will greatly influence the quality and accuracy of information.
- Some workshop needs assessment strategies are more complex and demanding than others. However, by asking questions about the amount of time available, the level of confidence and the cost-benefits of various strategies, instructional developers can tailor-make a needs assessment plan to assist in the planning of effective workshops.

#### Additional Readings

- Bland, C. J. *Faculty development through workshops*. Springfield, Ill.: Charles C. Thomas, 1980.
- Davis, L. N. *Planning, conducting and evaluating workshops*. Austin, Tex.: Learning Concepts, Inc., 1974.
- Laird, D. *Approaches to training and development*. Reading, Mass.: Addison-Wesley, 1978.
- Steadham, S. V. *Learning to select a needs assessment strategy*. *Training and Development Journal*, 1980, 34, 56-61.

### SOLUTIONS TO PRACTICE EXERCISES

#### Exercise 1: Selecting Strategies

While there are many ways to assess the audience's learning needs for this workshop, here is one possible plan:

1. Confirm the departmental chairperson's perspective of the need for the workshop by telephoning a sample (four to five members) of the departmental faculty.
2. Observe course objectives developed by the departmental faculty.
3. Mail a preworkshop letter to the departmental faculty describing the reason for the workshop, the workshop objectives and agenda, and materials the audience should bring to the workshop.
4. Talk to the early arrivers.
5. At the beginning of the workshop, ask faculty members to identify questions they have about instructional objectives and post them on a flipchart for later use.

Three strategies were not selected for this problem: The personal interview and written questionnaire were not selected because of the time required; there was no previous workshop presenter to contact for this audience.

#### Exercise 2: Formulating Questions

The following are possible questions to ask faculty members in conducting the needs assessment for the instructional objectives workshop. They represent suggested questions formats, but not all possible questions.

##### Faculty Knowledge

- What does the term "learning conditions" mean to you?
- How do you use instructional objectives in your courses?

##### Faculty Attitude

- Do you believe objectives are necessary for effective teaching? Why or why not?
- What disadvantages can you see in using objectives? Advantages?

##### Faculty Expectations

- What problems have you experienced in using instructional objectives?
- What questions about instructional objectives would you like to have answered during the workshop?

#### Exercise 3: Applying the Concepts

Here is one possible way to conduct the audience needs assessment for the workshop:

##### Before the Workshop:

1. Contact the professional association (by phone or letter) to get the names, addresses, and telephone numbers of those registered to attend the workshop.
2. Conduct a telephone survey of a sample (four to five members) of the audience. Interview each to determine knowledge of the workshop topic, attitude toward the topic, and personal expectations for the workshop. Or prepare a written questionnaire asking the same questions and mail it to all people currently registered for the workshop.
3. Talk with someone at the association or past presenters to learn the procedures, timelines, norms, and resources for conducting workshops.
4. Interview colleagues to get their reactions and input to the tentative workshop objectives, agenda, and strategies.
5. As people arrive for the workshop, briefly interview the early-arrivers to find out what they already know, what they would like to know, etc.

##### During the Workshop

1. Ask the audience to complete a brief pretest. This provides an early indication of the audience's mastery of the workshop topic.
2. When asking the audience to introduce themselves to the entire group, also ask them to share their reasons for attending the workshop and what they would like to learn.