Media File Name: Needs Assessment.mp3
Media File ID: 2656396
Media Duration: 1:00:01
Order Number: 1929100
Date Ordered: 2018-06-22

Naomi: Hello, everyone and welcome to this "Ask the Expert at Webinar, Tips and Tools, Planning and Conducting a Community Need Assessment". I'm Naomi Clemmons with the Healthy Start Epic Center. We have approximately 60 minutes set aside for today's presentation and conversation. The webinar is being recorded. The recording along with the transcript and slides will be posted to the Epic Center website following the webinar. We encourage your participation so at any point in time if you have questions or comments please chat them in at the bottom left corner of your screen.

We will only be taking a few questions via chat. Also we want your feedback on this event so please take a moment following the webinar to complete the survey that will pop up right after it ends.

So here is how we structure the webinar. First you'll hear welcome remarks from the division of Healthy Start and Perinatal Services. Then you'll hear from my colleagues Alec McKinney and Natalie Truesdell at JSI on conducting a needs assessment. We'll do a Q&A through the presentation...throughout the presentation and also have time at the end of the webinar for more questions and answers.

But before we get started let's do a quick pretest knowledge check. Let us know your answers to these following questions. So the first question. Needs assessment is one-time activity that primarily focuses on quantitative data. True or false?

Looks like answers are coming in. False. Thanks, everyone for completing that first question. Now the next question. There's only one effective approach to needs assessment for Healthy Start. True or false?

Fantastic. Thanks, everyone. And now for the last question. It's important to develop a stakeholder engagement plan to capture broad input, promote collaboration and facilitate implementation. True or false?
Great. Thanks, everyone for participating.

So now I would like to introduce Madelyn Reyes, Senior Nurse Consultant with the Division of Health Start and Perinatal Services.

Madelyn: Thank you, Naomi. Good afternoon and welcome. Conducting a needs assessment is an important step in understanding areas for improvement within your community. The purpose of this webinar is to explore the process of conducting a needs assessment such as the importance of planning, ways to engage stakeholders, strategies for collecting data and then translating the findings to an action plan to inform your work. The presentation will cover tips, tools and templates for Healthy Start programs looking to update or start fresh with their needs assessments and explore whether trends and gaps in the community have shifted or new opportunities have emerged. Specifically, this webinar has the following objectives. To describe the

importance of planning when conducting a needs assessment, identify relevant data sources, describe effective data collection methods and describe tips, tools and templates for a needs assessment. Thank you and now I'll turn it back to Naomi to introduce our presenters.

Naomi: Thanks so much, Madelyn. So most of you know me. I'm one of the technical assistants, coordinators with the Healthy Start Epic Center at JSI and in addition to my work with the Epic Center I've also participated in many needs assessments including supporting state Title V programs on their strength and needs assessment processes. I'd also like to introduce my colleagues Alec McKinney and Natalie Truesdell. Alec?

Alec: Hello, everybody. My name is Alec McKinney and I'm really thrilled to be here. I'm also an employee at JSI and I have not been with the Epic Center before but a huge portion of my work is with needs assessments for a variety of different clients and I'm excited to share my expertise and experience today about...just so you have the context of my past work. About a third of my work was primary care. Not so much Healthy Start. A third of this with community health needs assessments and a third is doing strategic planning for cross sector collaboratives, HDOs or coalitions or sometimes Medicaid providers that have to deal with broad prospectives and providers.

So I am not the expert in Healthy Start but I am an expert in needs assessments and with these types of cross sector collaborative. So I will rely on Naomi's help to give some context. But I'm thrilled to be here. Thank you.

Naomi: Thank you, Alec. Natalie, do you wanna say a few words?

Natalie: Thanks, Naomi. Hi, everyone. My name's Natalie Truesdell and I'm also with JSI. I had the pleasure of working with Alec on needs assessments for about a decade now. So everything I know about needs assessments really comes from Alec but I'm happy to join him on the call today. And similar to Alec, I know maternal and child health. I have had the pleasure of doing one very focused needs assessment of maternal health.

But more often I'm doing more broad needs assessments that are looking at a community from all aspects of health and I've done that with communities that, you know, the city, county, region and state level. I'm currently working on the state wide needs assessment for the state of Maine in fact which is a shared collaborative process between four major hospital systems and the state health department. So excited to share with you all some of the things that Alec and I have learned along the way.

Naomi: Thank you, Natalie. And Alec, I am going to hand it over to you.

Alec: Terrific. Well, thanks, Naomi. So let me just say based on your

performance on the pretest I don't...I'm not sure I need to present today. You all did extremely well. Perhaps those are softball questions. But I just wanted to spend a little bit of time talking about the importance of conducting needs assessments and, you know, certainly the, you know, one of the main objectives is to identify community need. But they're much more broad than that and much more important.

In my experience they...you often will understand what your needs are in your community because perhaps you've done needs assessments in the past or, you know, or because, you know, a lot of the needs that are out there related to community health are relatively well understood. But I think it's absolutely important to use these assessment processes to educate people, to create a dialogue and to really engage people in the process both in understanding and clarifying need but also with respect to, you know, initiating plans and implementing plans.

So I would really encourage you all to view the needs assessment as a...not just a means to understanding and identifying community need although of course that's a critical part but also to truly, truly engaging the community and all of the various service providers and stakeholders and including the residents and your target populations and consumers. This type of dialogue and education and engagement would absolutely set the stage for your privatization process, your planning process and your implementation process. So my first point is really just to view that in a much broader lens than assessment. And, you know, I personally see this as really a critical step in our efforts to try to transform how we provide services and how we provide care and truly improve community health and health status.

I think a central tenant to really the reforms that are happening in the United States is really about cross sector collaboration and the importance of multi sector cross sector collaboration and partnership. And without that type of partnership and engagement across a very wide spectrum across sectors we really can't see the changes. We're not gonna see the changes that we need to see.

It's...you know, we know that it's not necessarily just about prevent...about addressing disease and conditions but it's much more about engaging a broad collaborative around addressing social determinants of health and really making sure that particularly those in need are having all of their varied issues addressed and their barriers removed to access.

And so these assessment and planning processes really help set the stage for a much broader engagement and planning effort. So again my first thought is to really think about these much more broadly than just assessing need.

There are a lot of different frameworks out there to...that might help you

get in the right frame of mind and help you to do the planning and preparation necessary. And I'm not necessarily endorsing any of these frameworks but the CDC, NACCHO, National Association of County and City Health Officials and the American Hospital Association and their Association of Community Health Improvement or ACHI are three organizations that have developed their frameworks and I encourage you to go on those websites and see how they articulate and frame how they conduct assessments of this kind.

Some of them are geared more towards program assessments. Others are geared more towards health departments and their much broader role in health and public health and some are much more around, you know, community health needs assessments. But they all I think have very common elements and, you know, frame things in very similar ways. So I encourage you to look at those and I think it will help to augment some of the things that I talk about today.

So with respect to common elements I think that it's important to think about that needs assessments involve a lot of different tasks and activities but I think those tasks and activities can be broken down into four major areas. The first is really understanding and framing your assessment, preparing both an approach and the activities that you're gonna do as well as, you know, planning who is gonna be involved and how you're gonna engage the community.

Now I put engagement in the preparation and planning phase here but I think it's absolutely critical to understand that engagement has to happen throughout the whole process. You need to engage people at the beginning as you're formulating the assessment, you need to engage people while you're conducting the assessment and the data collection and analysis phase, you absolutely need to engage all of your various stakeholders with strategic planning and then also in the evaluation. So while I put the engagement into beginning here this diagram needs some type of an element that shows that engagement really happens across all these different phases.

The second area is around assessment and Natalie is gonna chime in a little bit in a bit around the importance of collecting quantitative and qualitative data that captures information on community characteristics, on community assets and strengths and weaknesses in your communities both services and programs as well as different types of resources or maybe even, you know, specific leaders or segments of population who can really speak on behalf of certain at risk populations. So what are the characteristics, what are your assets and of course what are the risk factors and health status trends that really underline need? And in all these cases you really do need both quantitative data and qualitative.

The third is your strategic planning and, you know, the assessment of information that you collect really feeds into the strategic planning. Prioritization and planning, trying to identify and align needs across the community. Reporting, both sort of initial and preliminary reporting to get people's feedback as well as final reporting. And then once your assessment findings and your priority are set really trying to do implementation and, you know, pre-implementation and implementation to get programs going and planning those activities is of course critical. And then a valuation. It's a...you know, it's in the context of continuous quality improvement and ongoing evaluation. You need to set your assessments up right at the beginning to capture data that will then be translated into tracking your progress towards, you know, your outcomes and really assessing how well your programs are being implemented and if they're in fact addressing the needs that you had identified during the assessment process. And Natalie will talk a bit about evaluation as well.

So these four elements really framed our presentation today and we'll be talking about preparation and planning. Natalie is gonna be talking about the assessment phase. I'll come back and talk about strategic planning and then Natalie will come back and talk about evaluation.

So why don't we try to take a little break? I wish I could be there, you know, and talking to you all face to face but here's one opportunity that...just to have a little bit of give and take. Do people know of other needs assessment elements that I have missed or frameworks that you have used before that might sort of guide your work or that, you know, we should know about?

Naomi: We have one comment, Alec. Jackie Ward said map.

Alec: Absolutely, Jackie. And the middle graphic in fact in that slide, a few slides back was a description of the map process that NACCHO has really endorsed as a tool for public health accreditation. So absolutely. The map process is a great example.

Naomi: Any other questions for Alec? And Alec, I just wanna make a comment that I'm really glad that you highlighted the evaluation element because I think it's often forgotten that the needs assessments can really lead nicely into evaluation planning. So thanks for highlighting that.

Alec: Absolutely. And, you know, one thing that I try to do in my own assessments is to use or try to use the same quantitative data as you assess need that you will likely to be using to assess progress and impact. That way you're automatically dialing in the trend data that you might need to actually track it over time. If you use different data points to track outcome, then you're often missing that baseline trend data.

Naomi: It doesn't look like we have any more questions right now but I'm

sure folks will have more as the presentation progresses.

Alec: So as I said I'm gonna be breaking this up into preparation planning, assessment, strategic planning and evaluation and then I threw in a fifth element here which Natalie will touch on during her evaluation presentation just about CQI and ongoing planning assessments implementation. So this is not just a one-year task. This is really an ongoing task that, you know, your assessments and your strategy may very well be a three year, you know, a three-year assessment but you need to also do it on an annual ongoing basis.

So the first step here is just around preparation and, you know, I suppose this is obvious but I really encourage you all to be very, very clear right from the outset what your purpose is and to articulate goals of the assessment and often I will develop some analytic questions that help to really frame the questions. So if you...you know, just as an example you might wanna say...your assessment might be to better understand the needs of homeless populations.

And you want to understand are there...you know, what are the needs of those homeless populations, what are the service gaps, what are the barriers, are there...you know, how am I going to guide the case managers in my community that support these...the...those that are homeless? So just be as clear as you can about the purpose and the goals and perhaps identify some analytic questions so that you can design your needs assessment to really...to truly address those ideas.

The second is in order to assist you along the way because you really can't do this yourselves and also to begin the engagement process I encourage you to develop both a steering committee and really an advisory committee as well. The steering committee would just be a smaller group of people that would be willing to, you know, roll up their sleeves and to, you know, to do, you know, the day to day work.

And the advisory committee would be a much broader set of people that cross sectors, the health sector, the community health sector, the public health sector across all of the various domains that you can break up help. Then...and would be a sounding board that you might meet periodically. If the assessment was framed over a four-month period, then they might be involved on a monthly basis whereas the steering committee would be involved on a weekly or biweekly basis.

Then designing an assessment and engagement approach and your methods. How are you gonna incorporate secondary data, quantitative data? How are you gonna engage the community? Are you gonna do focus groups? Are you gonna do community forums? And to develop a very detailed work plan with a timeline. And then do a kickoff meeting with your steering committee and your advisory committee just to confirm that plan and really kick start and to build some enthusiasm

regarding the needs assessments, your goals and your ultimate expectations for the assessments.

So that planning is absolutely critical and the slide here just gives you a little bit of sense of the work plan that I often will use. Of course this is a very rudimentary one but use a work plan, have this guide your work, make sure that your tasks and responsibilities across your team are clear and, you know, the tighter ship you run, the more likely people are gonna be engaged and, you know, you'll set the stage for implementation if you can run a clean and precise sort of assessment process.

So I'm not sure if people have any questions but, you know, considering your organization, your community, what you wanna accomplish through the needs assessment. You know, what is it that you wanna accomplish or hope to accomplish through your needs assessments with Healthy Start? Are there particular examples that you wanna cite today? Or if you have any questions around the preparation and planning phase.

Naomi: So folks, please chat them in. We are here to answer any questions that you have. One question. I would like to strengthen community relationships. What do you think about that question, Alec?

Alec: Absolutely. I mean, that's definitely one of the hopes and accomplishments that you wanna get out of these needs assessments is to really...to engage people who are doing some of the work that you hope to have done out of this assessment or as part of this process. And, you know, strengthen those relationships and leverage the resources that exist. And a lot of this work is happening in some ways probably in your community and trying to make sure that you're leveraging all of the resources that exist and that you're strengthening those relationships is an important outcome, absolutely.

Naomi: Alec, you and I talked before this webinar about the stakeholder engagement process and when we were talking I mentioned that Healthy Start...I talked about the Healthy Start program participants and you said they would be a good constituent to make sure folks engaged in their assessment process. If you could talk a little bit about just how quickly should folks start convening this group and how frequently should they convene and throughout the assessment process. And then there are some other questions that came up that I wanna ask you as well.

Alec: Yeah. The steering committee, you know, typically meets every couple of weeks or a month just to make sure that the actual assessment process and, you know, planning and engagement initiatives are on schedule and to fine tune the work plan. The advisory committee typically meets...I like to phase it in a three phase approach where you, you know, do a preliminary assessment of maybe just the

quantitative data and some interviews and then you engage the advisory committee. And then you get into a lot of the engagement activities. You know, maybe that takes another six weeks. And then you call in the advisory committee and you engage them again and get a sense of the findings to date and then maybe get further along in developing some of your priorities and plans and you bring the advisory committee again. So I think the advisory committee would meet, you know, maybe three times over a four to five-month period and the steering committee much more regularly on a week to week or maybe every couple of week basis.

Naomi: Great. And now I wanna share some more thoughts or comments from folks in terms of what they hope to accomplish. One comment is hoping to involve those that participate in Healthy Start into our focus groups and community survey. Another comment. Understand how to more effectively reach preconception women. The next one. Hope to accomplish...determine where needs are greatest for a particular set of services.

Alec: Yeah.

Naomi: And it's...

Alec: Great. Let me just comment a few of those. As far as involving...sort of defining and involving preconception women, absolutely. I mean, I think what's really important is that you involve the consumers and community residents in your assessment at all phases, both the planning, the data collection for sure and understanding need and then ultimately to the planning and implementation phases.

And so trying to involve those that may be often left behind or hidden or whose voices are not often heard is particularly important. So I think it's really important to think about who you need to involve, who are those most at risk and then design your assessment methodology to particularly reach out and to really truly strategize about how you're gonna reach those hidden populations and important populations. I...you know, we all...who've done these assessments before. We often will get to the end and we'll say, "Well, tell me something I didn't know. I knew this was, you know, I knew this was the outcome even before we started." But I think what...this always happens is that we end up refining our understanding, clarifying what the needs are and often understanding and perhaps even deliberately focusing on clarifying disparities. You may understand the needs but you may not understand the disparities that exist.

So I really think that these assessments are important to clarify a need and to really understand at a deeper level the disparities that exist. And I completely agree related to understanding where the needs are, you know. Determine the greatest needs and so I appreciate these comments and questions.

Naomi: Right. Thank you, Alec.

Alec: I'm a...I wanna make sure that we get through this and we only have about half an hour left so I'm gonna turn this over to Natalie to talk a little bit about quantitative and qualitative assessment.

Natalie: Thanks, Alec. So [inaudible 00:27:59] just been talking a little bit about what you wanna accomplish and what kind of information you'd like and as Alec mentioned, when you go about a needs assessment, there's a lot of different data sources that you have or types of data that you can use to inform your objectives.

And just kinda going back to the different types of information you'd wanna know is...you know, if you're trying to describe the community need, you're describing what populations within your community do you really need to focus on to address disparities and to understand what exists in the community that's gonna support working towards your goals towards improved health for those populations you identify. So what are the community assets and the strengths?

So, you know, there's two major types of data, quantitative data, qualitative data. You know, both important and absolutely you can't do an assessment with only one. First I'm gonna talk about the quantitative data a little bit and the quantitative data...and here are some different types at a high level. The quantitative data can tell you the [inaudible 00:29:00] community, basic demographic information in terms of number of people, is there migration in and out of the community, what does that look like, what does that impact potentially on health.

We also could look at all those components that address the...think about...understand the social determents of health, in terms of housing, transportation, income levels, education. And the quantitative data can also give you information on barriers to care. There's information on provider numbers in your community. That can be helpful. It can provide information on service gaps and then also those risk factors and health status.

And [inaudible 00:29:44] say about quantitative data really leads to what Alec was just saying is it's fantastic to kinda give you trends of what's happening over time to say in the last decade are we seeing increased poverty in the community overall and how does that relate to what's happening in the state level or as a national picture to again just kind of understand what impact that's gonna have on health in your community. So the quantitative data's great for understanding those trends over time. It also can be used to start to understand disparity.

A lot of data is available that can be broken down by race and ethnicity and poverty and education but sometimes there's limitations to that and depending on the geographic area you're looking at as a population and size small numbers can limit your ability to look at disparity. So the

qualitative information can be very important there too.

What the quantitative data that doesn't provide you is kind of the why. So you may be seeing a trend in let's say reduced breastfeeding for example, but can you explain why that's happening? Likely not from the data. So the qualitative data is really important in terms of understanding when you're seeing trends why that maybe happening and you may not get the full explanation or a perfect explanation but the qualitative data questions gives an opportunity to start answering those questions that the data really posed for you.

When I look at quantitative data usually it's the starting place for me to think about a lot of questions I wanna answer to the qualitative data. So you'll get an understanding of why the community...and this is like talking to the community. Why do you think we're seeing this trend in the data? What is your experience in your community? What are you seeing among your yourselves, your neighbors, your friends that might be impacting us seeing this trend in the data? And really talk about those things a bit. We see it from a data perspective in terms of social determinants of health.

It's also the time to start understanding what resources are in the community. As Alec mentioned in the beginning there's all types of assets in the community. It's the organizations that are there, the leadership, both from a volunteer perspective and in terms of strong leaders at social service organizations that may have a vision to support moving towards improved health and to identify weaknesses to know, you know, there's a gap in the service. It really doesn't exist in the community or you have to travel 60 miles to get it. So asking the types of questions to understand those things.

We also...very naturally the conversation goes when you're doing focus groups or [inaudible 00:32:22] interviews. People there may not try to provide some ideas of what could be done to address those issues.

Naomi: Natalie, I just wanna jump in and say this is also an opportunity to tap their advisory group that Alec mentioned earlier, convening, to use those advisors as a sounding board [inaudible 00:32:42] why.

Natalie: Right, right. And as, you know, as, you know, I think Alec mention is when you do a phase needs assessment you have opportunities to present the data along the way. They're not just presenting at once. So you get some initial reactions and thoughts and feedback to that data that can inform where you go next with the assessments.

So I kinda started talking about this a little bit already but I wanna give you all some sense of the types of data that you may wanna incorporate into your assessments. Census data is actually really rich in terms of understanding the demographics of the community. It can tell you a lot

especially when looked at over time. The census data also includes much of the social determinant of how data such as poverty, education and employment, etc. and then working with your data local health department [inaudible 00:33:36] data but it gives you more information on health behaviors and health risks as far as incidents and prevalence and outcomes of health in the community.

You know, we have here listed also hospitalization rates and not all data is necessarily gonna maybe come from your health department. It's also important to think about data sources from your local partners and hopefully they're engaged in your process and part of your stakeholder committee so you're able to get some data that might not be publicly available but is locally available through your hospital or other providers in your community.

Also, you know, likely part of your partnership could be other organizations that also are doing needs assessments and maybe they've already done some of that work for you whether it's the community action agency, a local health center. There's a lot of other organizations that are doing these assessments and might be able to support you in your needs assessments process with the data they have already collected.

Similarly, you know, there's national level survey data but there's also health and community surveys that are done that might support your work and having a relationship with various organizations to support you in doing that and just kinda continue to think about those other partners. Maybe United Way etc. that maybe did a community survey that would have data that could be helpful to you. It doesn't all have to be [inaudible 00:34:59] the collection, absolutely use all the data that's locally available within reason.

You wanna have data that's recent for sure but maybe you've got resources and time to collect some new data and if you can do that, fantastic. You know, a new community survey can provide you really good information. But also before you launch into that maybe you ought to look at what community surveys have been done in the last three years by your partners that might inform you and maybe you take it a step farther than they did with their survey but what they have given you a kind of a baseline assessment.

In terms of the qualitative data of the four kind of core areas or types that we typically do are key inform interviews, focus groups, community forums and as I was just talking about, our community survey data. And all of these different types of sources give you different types of information. So the key inform interviews are really helpful when you wanna talk to leadership of various organizations and understand their perspective on the issues.

Focus groups are fantastic to get community perspective and really dive in to understand a particular group. Especially those groups that you might not have good quantitative data on or those that are not likely to fill out a survey due to literacy reasons but they will be able to talk to you. So focus groups are very important for getting the information from hard to reach populations and getting...making sure they have a voice in your assessment.

And then community forums are more broad, larger venue to get a broad swab of the community and engage more specific types of people in the conversation around health. Then as I mentioned the community survey and that can be done in a number of ways. You can do a very formal structured survey which goes through a sampling process. Those are definitely more time and resource intensive. Or you can actually have a more informal process where you develop electronic surveys and send out through a listserv for example and that can also give you good information. And you really just have to think about, you know, your purpose and intent and what kind of results you want out to make those kinds of decisions around your survey.

Okay. So Naomi kindly has pulled together a great list for you all in terms of some very specific data sources that might be helpful for your assessment as it relates to maternal and child health and you all are probably familiar with these but I think this is a nice resource. And all of these are national data sets that are available at the state level everywhere but as I was mentioning there's often other state level data sources that you should be thinking about. Maybe your state has done some additional [inaudible 00:37:45] risk factor surveillance system survey questions that isn't available at the national level. So make sure you look at your state resources in addition to what's available from the CDC for example.

And then again think about the very local sources of data that might be available to you.

Naomi: And I just wanted to add...Natalie, thank you. Is that Title V, because they are doing needs assessments every five years and they're updating their assessments [inaudible 00:38:15] years so they're a great resource.

Alec: Natalie, if I can just interject. This is Alec again. You know, I often think that there are three major sources of some of the data. And you really need all three. You know, one is a more of a quantitative or objective sense of need and that typically comes from a quantitative data. But you really can't really understand, you know, the why and perhaps what you should prioritize or what is gonna have traction in your community unless you really capture the qualitative information and understand community perceptions, attitudes and frankly what people

really wanna do.

I mean, if your data says one thing very strongly but the community has no interest in doing it or has no ability to do it or that's not feasible then it doesn't really matter what the data says. So you absolutely need the more qualitative perspective. And then the third thing is just around what are the resources in your community. What are the assets? What are the gaps? What are your strengths and weaknesses from your existing services? And so, you know, if you...if the data says one thing and everyone says, "Yeah, I wanna do that." But then you already have programs and services that address it then that doesn't really lead to implementation either.

So you really do need to understand and assess both what does the objective data say, what do people wanna do and what do people really think is important and then what are you currently doing in your assets and the strengths in your community. So all three of those things are really important and sort of a three-legged stool in order to really inform your implementation plan.

Natalie: Right. Yeah, I think the more we...I've done this. The qualitative information is usually [inaudible 00:39:59] when Alec was talking about, you know...you think you're coming to a same conclusion perhaps that you already knew. The qualitative information is that which add on. So maybe you knew there was a particular concern in the community but this is your opportunity to really understand a deeper why behind it. So it's really important. Okay.

So this slide kind of summarizes some things to just really think about from a process perspective if you go about your needs assessment. The amount of data that's available is actually probably more than is manageable for a non-data person. So think about having someone in your team that is willing to take the time to really organize the new data in a structured way, in a spread...you know, develop a spreadsheet. Think about it by geography and do it in a thoughtful way because it's easy to get overwhelmed by the types and the amount of data that you have.

It's also important to have someone in your team that has some understanding [inaudible 00:41:07] significance of...and to be able to look at those trends over time and understand confidence intervals and be able to say, "Well, you know, the numbers are changing over time but when you look at the sample size those differences really aren't enough to...aren't big enough for us to know that there's a true difference or based on the sample that we've gotten."

So having someone that's part of your team that can really understand the data from that perspective is important just so you don't think there's a change when there really isn't. So that's important to have as part of

your process.

And then the other thing to think about is the fact that, you know, there are opportunities to look at data in different ways. So you can then have your core analysis which gives you the information to a population level but as you kind of dive in and wanna look deeper you may wanna think about, "Well, what's the impact of this particular indicator among those with a college education compared to those with a high school education." Or, "What's the difference between the community that was in an urban setting versus a more rural setting?"

So there's just an infinite number of kind of secondary analyses or different ways to look at the data and as part of your process you're really gonna have to prioritize because likely you won't have the time and the resources to do all of them. And that's where it's...again your stakeholder group that you engage with the process can help you think about that and not get overwhelmed by the many different things you've been doing and keeps them focused on the assessment in a way that's manageable in the time and the resources you have.

In terms of the qualitative data, you know, these assessments are a type of research and to keep things consistent and organized it's important to be thoughtful about developing a data collection guide whether it's a focus group guide or a key inform interview guide. Especially if you have multiple people supporting you in your process and doing those interviews and focus groups so everyone's asking the same questions and really allows you to pull the information together at the end of your assessment [inaudible 00:43:14] how you collected it.

In terms of how you do the work it's also important to have some skill or someone in your team guiding the work to use non-directive interviewing, facilitation techniques so that you're getting objective information and it hasn't been biased by the way the questions had been asked. And as in any process documenting all this work as it goes along the way is important so that you don't lose some of those nuanced details that you're collecting through the process.

And then, you know, when you get to the point where you've done all this data collection there is quite a bit of work to identify and analyze the data and that's really [inaudible 00:43:57] qualitative data and the quantitative data and not to shortchange that process because likely when you get to the end of this there's gonna be quite a bit of information to wade through and to be...take the time and have a process and think about what your process will be to prioritize and identify the themes that are coming out of the different data sources both the qualitative and the quantitative.

And as Alec was mentioning before, you know, there is some level of wanting to kinda cross validate. So if your interviews are telling you

something, is that borne out by your quantitative data and vice versa? And if there are differences, you know, maybe that's again an important question to ask your stakeholder group and say we're seeing this in the quantitative data but our qualitative folks are saying, you know...interviews are saying something else. What do you all think and how do we reconcile those differences? And there may be good reasons.

You know, when...you know, just example of that is often quantitative data is older. There's a lag between when it's reported and when you're doing those needs assessment. So a very specific example from a recent assessment I've done is among children. You likely know vaping has become a big issue around tobacco. But the quantitative data is not showing that because it's so new within the last year and last two years in terms of uptake of vaping as a way to use tobacco. It's not coming through the data but when you talk to kids, when you talk to parents it's their number one concern. So that's just one example of how you have to kind of use both sources and kind of validate across sources.

I'm gonna stop there and see if this information on both sources and approach has brought any questions from all of you.

Alec: Actually, Natalie, just in the essence of time I think if you all can think about these questions and maybe hold them till the end or just chat them into the chat box while I continue on here. We only have about 10 or 15 more minutes here and so I'm just gonna spend two or three minutes talking about strategic planning and prioritization and I'll turn this back to Natalie for a couple more minutes for evaluation and then I'll wrap up. I wanna at least leave a few more minutes for final questions. So if a...so just chat some answers to those questions in the box and we'll get...hopefully get that till the end.

So I think we've hammered this home so I don't think I need to spend too much more time on this but, you know, it's much more than assessment. We're really talking about a broader process that allows you to prioritize the themes and the needs that come [inaudible 00:46:28] assessment phase and really start thinking about, okay, what am I gonna do? Who's gonna do it? How am I gonna do it? And, you know, what are the key tactics? And all of that takes a lot of talking and engagement.

And so the first step is really to present the data to internal, external stakeholders, you know, maybe in a series of meetings, maybe in just one big three-hour retreat. It really just depends on how you wanna do it. But, you know, digesting the data that you collected, identifying priorities and really aligning those priorities across all of the organizations that are involved. I'm a real proponent of polling software and I'll talk about that in a second but I think, you know, particularly if

you have more than, you know, 12 or 15 people in your group I think polling can be a really exciting way to sort of get people to just think about, you know, where the differences are and where they...where things are aligned.

So holding a retreat, clarifying the community need, identifying your priorities and then a major part of this process is really identifying what evidence inform program services, community interventions exist. And some of that came through your asset inventory and your identification of what your strengths are in your community but really cataloguing those to really understanding them and having that brought to bear on what your ultimate implementation plan is, is really important.

Then developing an action plan that is really clear and concise and focused as possible. And I...there's an example that I'll show you in a second about that but I think identifying by priority area, you know, what are your goals, what are your objectives, what are the actual activities, how are you gonna measure impact? All of that information has to be put into some type of a concise action plan. And then ultimately you need to develop a really...a broad set of written and oral presentations that allow you to disseminate the information.

So, you know, I'm a fan of...and used the...have used two or three of these different polling softwares so I'd encourage you to try those out and see if they can be helpful as your...engaging your advisory committee or perhaps a much larger group in the community to identify priorities.

You know, I'm also a big fan of visuals to help people to understand what the priorities are then these can take many different forms and shapes but doing something in a visual way that really identifies the priorities and sort of clarifies what those priorities are and I think that type of messaging to the community in a visual and compelling way can help to really align ideas and align activities that are...that come out of a needs assessment process.

And then yes. Here's just an example of a framework that I've used just to articulate the tech developments that are in work plans. And so here you have three different priorities, you have a series of goals and objectives for each of those priorities, you have a [inaudible 00:50:01] of metrics and sort of an articulation of your evaluation plan and then you have very specific strategy. So, you know, so here's just an example of the...of an action plan that could help to really frame and guide implementation based on your needs assessment.

And then just finally before I turn this back to Natalie, I think developing a very...a multi-faceted dissemination plan that has a written report, maybe an executive summary and then perhaps maybe some, I often call them data place maps that really articulate the data in a compelling

way and identify emerging themes. Whatever they are but just come up with a multi-faceted dissemination of a reporting plan.

So again I'm afraid I'm little quick on time here but just think about the strategies that you've implemented to facilitate an alignment and priorities. You know, are there...you know, what have you done and what has worked for you? Just think about that and if you have any ideas just type that into the chat box.

Naomi: Alec, can I ask one quick question?

Alec: Sure.

Naomi: How do you get all the data down to a manageable amount for the advisory committee to decide on?

Alec: I think what I would suggest and what I often will do is to have a summary presentation either in a, you know, in a written narrative document, a couple of pages or maybe in a slide deck. And then append the data. I mean, it's really important to have an appended data set that...because people love the data. And people...if you don't have that then people will often be skeptical and, you know, you'll lose people.

So you absolutely need the full range of quantitative and qualitative findings but you need to summarize it in something that's digestible. So I would either do a slide deck or some type of a written executive summary. You know, with visuals and hopefully with graphs and, you know, maps would be fantastic but those can be difficult to generate.

Naomi: Thank you.

Alec: Natalie, I don't know if you wanna just talk a little bit more about evaluation and impact and process.

Natalie: Sure, I won't take too much time because I know we're getting at the end here but as Naomi put it out evaluation is really important and what's nice is if you have done this needs assessment process you're kind of setting yourself up very well to do evaluation. You might as well take an advantage of the fact that you've already pored over all this data and had a lot of conversation about what's really important for us to keep track of and understand what the impact is on our community as we move forward.

I like to use the analogy of like going on a road trip for non-evaluation people. It's like think about, well, we're going down the road. What do we wanna see along the way that'll tell us we're getting there or we're heading in the right direction? And, you know, you use both process and outcome measures and the process measures are important because you can see them sooner than you might see with an outcome measure which might not come for three or four years.

So...and I think it's...so it's important to include in the thinking about what measures do you wanna have in that evaluation plan and measures. Both that you can see a shorter term results as you go about

your work and those...as well as getting, you know, a big picture of what you wanna see even if it's gonna take 5 or 10 years. You wanna keep those on your roadmap as well to be measuring progress.

And if, you know...as we've said you can certainly use some of the data sources that you use as part of your assessment process that's part of your evaluation design and the benefit of national level survey data is it's not primary data that you have to collect again. It should, you know, be available on a regular frequency that you can just pull down and it doesn't require a lot of intensive data collection on your part. So as you think about your evaluation data it's definitely important to consider the resources you have to do local data collection and if you don't have those to rely more heavily on those data [inaudible 00:54:26] you know would be updated by another source on a frequency that is relevant to your work.

And, you know, like I think we have another separate slide on this but the more frequent that that data's updated the more quickly you will be able to understand impact of your work. So this last bullet here on promoting continuous quality and performance improvement...that's hard to do if your data's updated every three years. So you really kind of have to have a balanced mix of measures both of those that are gonna give you information on your work in six months to a year and those that are gonna maybe see a trend over a longer time horizon.

This is a tool I just wanna share with all of you to support thinking about data dashboards. And data dashboards are really a tool that can support reporting out to your stakeholders that are communicating with many people about that progress as it relates to your evaluation plans. So if you've decided that you really wanna focus on three key things in your community it's a way to keep people abreast of what you're doing. But developing a dashboard can seem a little overwhelming so I'm sharing here a resource that is part of the High Tech Center and I provide a link here and a visual so you know if you found it.

But what's nice about this tool is it gives you kind of a walkthrough and a process and how you build it from a conceptual tool perspective. It's easy to get in the weeds and designing a dashboard and it gets you focused on what platform are we using and what data are we throwing in and before you get to all those questions you have to think about, "Well, who are our users? Who's really gonna use this data and how are they gonna use it?" Because that's the foundation for developing a data dashboard.

And that data dashboard is very much a really high quality resource for supporting this concept of ongoing quality improvement. If you're doing needs assessments every three years likely you don't wanna be seeing not having any data at your fingerprints over a three-year gap period. So

a dashboard gives you an opportunity to look at your data much more frequently to check in and see if you're making the progress you had hoped to in that strategic planning and development.

So I'm gonna turn it back to Alec for a few more points.

Alec: Great. Thanks, everybody. This has been terrific. I think this is a great topic and I really do wish you luck in conducting these assessments. You know, a lot of these needs assessments are done because maybe they're a part of our requirement or they're mandated by, you know, state attorney general if you're a hospital or maybe 2BACA but I think these are incredibly important processes that you should really use to really, you know, facilitate engagement, promote engagement and partnership and collaboration. So I really wish you all luck and encourage you to, you know, to take things on in an enthusiastic way and not just in a check the box kinda way.

You know, we talked about this but planning is absolutely critical. Knowing where you're headed and what you wanna do, make sure that you're data driven, that you're capturing objective quantitative data, that you're using qualitative information to create the why and some of the nuance. They really have to be collaborative across all sectors involving all the different types of service providers and stakeholders. Especially residents and consumers and clients and those who are hidden.

They need to be comprehensive. They can't just focus on health status. They need to focus on social determinants, on barriers, on service gaps, on risk factors across all of the different segments that are at risk. They need to be inclusive meaning they're reaching out to those that are hidden and often obscured and whose voices aren't heard. They need to be outcome driven meaning that you need to make sure that you're capturing data to track and evaluate the impact of your programs. And then by all means please distribute them. You know, it's horrible to have these assessments just on a shelf. Put them in media that is...can be distributed and ingested by various types of audiences in plain language in different types of formats.

So those are some of my takeaways and Naomi, I know we have about one more minute to do the pre and post-test but I'm sure people will do well.

Naomi: Yes. I think we're gonna take questions and skip the pre...the post test.

Alec: Okay. Thanks, everybody. I know this has been a bit quick towards the end here but are there any questions at all?

Naomi: Okay. Alec and Natalie, thank you so much for a fantastic presentation. And just as a reminder to folks, please, please fill out the evaluation of this webinar. We really need and appreciate your feedback. Those of you who are interested, there's still scholarships

available for the certified patient counselor training and keep an eye out for an upcoming webinar on grant writing. Thank you, everyone.