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ABSTRACT

An effective needs assessment must be performed efficiently and systematically, and must reflect the specific circumstances of both students assessed and their educational environment. The purpose of this handbook is to furnish educators with guidance on how to perform such a needs assessment. The handbook is designed specifically for school administrators responsible for conducting needs assessments in the basic skills. Instructions, worksheets and samples are provided in an easy-to-follow format. There are five major sections: (1) an overview of the handbook; (2) an introduction to the subject, with program planning and evaluation information; (3) an outline and explanation of the Basic Skills Needs Assessment Project (BSNAP) model; (4) a step-by-step application of the BSNAP model; and (5) specific examples drawn from actual needs assessments. Of the four appendices, Appendix A describes Title II legislation authorizing the basic programs; Appendix B provides definitions of terms needed in the book; Appendix C presents an example for standards; and Appendix D contains names of basic skills projects. A bibliography is also included. (Author/GK)

NEEDS ASSESSMENT

HANDBOOK

FOR BASIC SKILLS PROJECTS

HOPE ASSOCIATES, INC.

2001 JEFFERSON DAVIS HWY

CRYSTAL CITY, ARLINGTON, VA 22202

FOR THE

UNITED STATES DEPARTMENT OF EDUCATION
WASHINGTON, D C 20202

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NEEDS ASSESSMENT HANDBOOK

FOR BASIC SKILLS PROJECTS

PROJECT OFFICER: Helen L. O'Leary

DELIVERED TO:

U.S. Department of Education
Basic Skills Program
400 Maryland Avenue, S.W.
Washington, DC 20202

PREPARED BY:

HOPE Associates, Inc.
2001 Jefferson Davis Highway
Suite 411
Arlington, VA 20008

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FOREWORD

To meet the total needs of students, the educational community must be committed to examining and analyzing the critical factors that determine the actual and potential success levels of students. To this end, educators must work systematically to identify, develop, and implement the most effective techniques for eliminating barriers to successful learning and for helping the students to realize their full potential. The first basic step in this process is to conduct a needs assessment concerning the students' development in the four basic skills -- reading, mathematics, written communication and oral communication.

For a needs assessment to be effective, it must be performed efficiently and systematically and it must reflect the specific circumstances of both the students being assessed and their educational environment.

The purpose of this handbook is to furnish educators throughout the United States with guidance on how to perform such a needs assessment.

The handbook has been designed specifically for school administrators responsible for conducting needs assessments in one or more of the basic skill areas. Instructions, worksheets, and samples are provided so that each administrator can clearly understand what has to be done, why it has to be done, and how best to do it with the available resources -- and without placing an extra administrative burden on the teachers.

Using this handbook, the school administrator can identify important goals and problem areas, set priorities for change, and modify existing programs so as to improve the students' proficiency in the basic skills. Furthermore, the administrator can learn how to foster wide support and participation for appropriate planning and implementation of new programs to improve not only the students' knowledge and abilities but also their values and attitudes toward mastering the basic skills that are essential for adult participation in our contemporary American society.

One of the keys to our future well-being as a nation is to make certain that the young people of today are well equipped with the basic skills of reading, mathematics, oral communication and written communication. One of the keys to so equipping them is to use this handbook to perform effective needs assessments.

Shirley A. Jackson, Director
Basic Skills Program

Helen O'Leary, Project Officer
Basic Skills Program

PREFACE

PREFACE

This needs assessment handbook is itself the result of a specialized needs assessment aimed at developing an effective, easy-to-follow guide for school administrators on how to perform and use the results of a needs assessment.

In performing initial research on this project, HOPE Associates, Inc. interviewed education officials, administrators, and teachers and conducted an intensive review of existing publications in the field of needs assessment. The research findings were then analyzed and the results were used to develop the core section of this book -- a simple yet comprehensive needs assessment model. To this core section we then added detailed instructions, worksheets, and samples to create a practical handbook tailored to the general needs of all school administrators and tailorable by them to their own specific circumstances.

Preparation of this document has been a collective effort. The project was initiated by the U.S. Office of Education, Basic Skills Improvement Program, and our sincere appreciation goes to two particular individuals: Shirley Jackson, Director of Basic Skills, whose dedication to quality education in the basic skills for children and youth made the project possible, and Helen L. O'Leary, Project Director, whose vision and steadfast dedication to excellence was our inspiration in the development of the handbook.

Our thanks also go to the members of the project's Panel of Experts, Panel member Belle Ruth Witkin, Ph. D. contributed many helpful materials and suggestions and assisted with the planning and implementation of a field review of the draft manuscript. Panel members Charlotte K. Brooks, Ph.D., S. Stuart Flanagan, Ed.D., William T. Hammond, Ph.D., Gloria M. McDonell, Ed.D., Nancy L. Mead, Ph.D., Irene C. Neaubauer, Ph.D., Dorothy Strong, and Dennis Tafoya, Ph.D. all provided useful materials, continuous guidance, and diligently reviewed the preliminary stages of the project.

As it would be unfair to mention by name only some of the State education officials, administrators, and teachers who together contributed to this project during the field review, we take this opportunity to acknowledge them collectively not only for their invaluable assistance to us but also for their ongoing commitment to educational excellence in their own schools and school districts.

In addition, I want to express my thanks to and acknowledge the contribution of Virgie G. Madison, Ed.D., senior research investigator at HOPE Associates, Inc., for her sincere commitment in the preparation of the initial draft of this document and her direction in conducting two Panel of Experts meetings and field review. I am also most grateful to Eileen McDavid, who provided active and effective support in all phases of this project, as well as Louis Briganti, Paul Elliott, and Judith Richardson, who reviewed and edited the manuscript and made useful suggestions for improvement in presentation. To Helen Moore, project secretary, many thanks.

Esperanza Medina, Ph.D.
President, HOPE Associates

SECTION I

HOW TO USE THIS HANDBOOK

This Needs Assessment and Planning Guidebook is organized in five major sections.

Section I gives an overview of the needs assessment handbook.

Section II, which serves as an introduction to the subject, contains program planning and evaluation information.

Section II contains an outline and explanation of the Basic Skills Needs Assessment Project (BSNAP) model for assessing the basic skills needs. The BSNAP model as presented in this section is intended to serve primarily as a management tool for administrators. By skimming through this section one becomes familiar with the major components of the model and an explanation of each. The model is divided into four parts and nine components, beginning with a preplanning and ending with a meta-assessment phase. Following each component, we present an outline of subcomponents, each of which is explained in capsule form.

Section IV shows the step-by-step application of the BSNAP model. It presents detailed instruction and worksheets that illustrate the various elements of the model for assessing needs in each of the basic skills.

Section V contains specific examples drawn from actual needs assessment. These examples are designed to help guide the needs assessors working with Section IV worksheets.

At the end of the book are four appendices: Appendix A describes the Title II legislation authorizing the basic skills programs; Appendix B provides definitions of terms needed in the book; Apendix C presents an example for standards; Appendix D contains names of Basic Skills Projects. After the appendices comes a general bibliography, which includes both a special section of key references and a section for other references.

SECTION II

INTRODUCTION

This Needs Assessment and Planning Handbook was designed for use primarily by school administrators, but it can also be readily understood and used by curriculum development specialists, teachers, planners, even concerned parents who must assess systematically the basic skills needs of students in elementary and secondary schools. While it was created specifically for people planning a program under Title II of the Elementary and Secondary Education Act (ESEA), it will be helpful to educators who would improve instruction and maintain effective accountability for development of the basic skills, or any other skills or academic areas.

This handbook addresses four basic skills as defined in ESEA's Title II: reading, oral communication, written communication, and mathematics. The book does not refer only to "minimal competencies" either; it includes the complete range of knowledge and performance potential in the four basic skills areas.

WHY NEEDS ASSESSMENT?

It is widely believed that classroom teachers know their students' needs through their daily instruction, periodic testing and record-keeping. Why, then, should one have to do a special needs assessment of the basic skills? There are several answers:

(1) needs assessments at both elementary and secondary levels are frequently required by school districts, along with regular testing.

(2) in some cases, needs assessments are conducted to comply with contractual requirements,

(3) Most states throughout the U.S. either require students to take statewide tests in reading, writing, and mathematics, and that they pass proficiency tests for graduation, or they define proficiency standards for their schools and citizens. Needs assessment provides a systematic approach

for determining the extent to which the schools are meeting those standards, and for planning changes needed to improve student performance.

Needs assessment at the district or school level has as its purpose the systematic analysis of needs, the targeting of resources to meet those needs, and the improvement of overall educational process. A needs assessment in the basic skills is aimed at achieving higher learner performance (where such need is identified) without placing additional management burdens on classroom teachers. It focuses on systematic, coordinated teaching efforts and helps teachers organize their already-developed diagnostic/prescriptive tools, turning them into a needs assessment tool. But it also forces assessors to consider a host of other factors which impact the educational process, in addition to the teacher's activities in the classroom. It helps to map out the impacts of a variety of factors, such as student attitudes, parental influence, community conditions, curriculum materials, school financial resources, etc., on learner performance.

Needs assessments provide educators, parents, and students with an essential overall picture of the students' needs. It provides for prioritization of these needs, and for identification of the needs of specific groups of students within a school population. The results of a needs assessment serve as a basis for a plan to improve individual instruction and special services in areas where needs may not have been evident before. They also provide a basis for developing strategies for institutional change at all levels of the school system.

RELATIONSHIP BETWEEN NEEDS ASSESSMENT AND EVALUATION

To place needs assessment in its proper focus, we must examine the similarities and differences between needs assessment and evaluation, and be concerned with both. The two processes are in fact similar in several ways:

- both are concerned with improving education,
- both involve survey instruments and statistical analysis,
- both provide a data base for better accountability,

- both contain data collection and analysis steps,
- both compare desired outcomes with actual outcomes in terms of student performance,
- both include reference to long and short-term goals and
- both provide information for decision-making.

However, evaluations normally stop at measuring the effectiveness of the instructional program. They are concerned primarily with the effectiveness of program implementation (the actual use of the curriculum by the teachers in their classrooms). Needs assessment should be considered an integral part of the continuous cycle of program planning, implementation, and evaluation. The information yielded by needs assessments help school managers, faculty, and administration to improve goals, objectives, curriculum, teacher skills, materials, other learning resources, even relevant community factors.

One professional can evaluate an educational program, but a needs assessment requires collective involvement by the school administration, faculty, and concerned parents. The evaluation process usually ends with a determination of program effectiveness, whereas the needs assessment process continues through selection of strategies for addressing the needs identified, implementation of those strategies for program improvement, and re-assessment.

HOW NEEDS ASSESSMENT RESULTS MAY BE USED

The following examples show how the results of a needs assessment might be used in planning, managing, or improving an instructional program.

- The needs assessment can determine whether the four basic skills are being addressed explicitly in the learning program, only implicitly, or not at all.

  EXAMPLE: Many schools find that no one is actually teaching speaking and listening skills. One high school found that no department felt responsible for teaching spelling, although all departments required students to spell accurately.

- It can show how well the four skill areas are, or are not integrated in the instructional program. (Are the skills being taught completely separately from each other, or are they coordinated?)

  EXAMPLE: Teachers (and not just English teachers) should be showing students that good organization of ideas is necessary for both writing and speaking, and that similar methods can be used in both skills areas. Mathematics concepts should also be related to communication concepts. Many schools find this kind of coordination lacking.

- Needs assessments can show the extent to which the four basic skills are being applied and developed in curricula such as science, social studies, music, even business education.

  EXAMPLE: Needs assessors can survey teachers to find out what skills and sub-skills are being taught, reinforced, or not taught in their classes; and, therefore, whether the application of the basic skills is made in the various content areas.

- Needs assessment can identify needs of particular groups of learners. It can identify needs of average, above average, and below average learners, as well as those with special basic skills needs attributed to physical or other handicaps. It can also idnetify whether boys and girls have the same or different needs in the four areas, especially in the upper grade levels.

  EXAMPLE: In one school a majority of students had reading scores above the statewide average on a given reading test. While the school's scores in general were higher than most of the other schools in the state, a needs assessment showed that even the school's best readers did not have the high level of conceptual skills needed for reading difficult material required by college preparatory courses.

- It can find out how the available resources in the individual school or school district are being coordinated to provide the best possible instruction in the basic skills for all students. (Coordination is defined here as the process of integrating those elements of the curricula and program that have related focus, especially in the basic skills. It is an effort to consciously design and plan ways to more effectively utilize the combined strengths of all resources to improve student development of basic skills.)

  EXAMPLE: One medium-sized school district found that it had over 40 projects financed by special funds provided by federal, state, or county projects, and that over 10 of them aimed at

improving reading, writing, or mathematics. The Title II Project Director found that several district projects were actually working at cross purposes, and that there was duplication and overlapping effort. She set up a staff development program to bring together teachers and counselors from the different programs and helped them work out better ways fo sharing ideas and resources, developing a joint effort to improve specific skills.

The overall intent of this handbook is to provide a simplified way to examine learner proficiencies, and, in addition, to focus on the related forces that impact on mastery of basic skills. It provides a means to identify problem areas, set priorities for change, and modify programs so as to improve overall learning.

The handbook helps you take a close look at your curriculum -- to ascertain whether there are staff and materials to support the curriculum effectively. Once this analysis is done, it will serve as a basis for planning and implementation of improved programs in the basic skill.

SECTION III

THE BSNAP MODEL

This section contains an outline and step-by-step explanation of the Basic Skills Needs Assessment Project (BSNAP) model. It is intended to serve primarily as a management tool for school administrators, but also provides a succint introduction to the needs assessment process for all people who will be participating in needs assessment activities.

DETAILED GUIDANCE AND SAMPLE WORKSHEETS FOR USE IN CARRYING OUT A NEEDS ASSESSMENT IN ACCORDANCE WITH THE BSNAP MODEL

This section will provide guidance and worksheets, and the title states, where it was felt that additional instruction might be helpful to the user. As you turn the pages of this section, you'll note that descriptive and instructional material is contained on left-side pages and sample worksheets or other reference materials are on the right side pages, facing the pertinent descriptive/instructional text.

This section is offered as an additional help to BSNAP model users. It is not assumed that all users will need to follow all instructions contained in this section, or that all sample worksheets and forms will prove useful in all cases. In many cases, you may decide to create worksheets customized to your own situation. Such worksheets may appear quite different from those contained herein, and still be entirely valid and appropriate to your needs.

Each sample worksheet or other reference tool contained in this section is referenced to a specific subsection of the BSNAP Model contained in the previous section, in order to clarify its relationship to the model process. So, if you decide you'd like additional guidance on developing product objectives for the four basic skills areas, (Section 2.2 of the BSNAP Model,) look for the designation "2.2 (Specific Planning)" at the upper left corner of the pages of this section.

This model was developed with a view toward integrating as much of the current state of the art of needs assessment as possible, and to be useful to as many potential users as possible. However, the authors emphasize the need for each user to be imaginative, creative, and innovative in his/her application of the model. In that way, the model can grow and live along with the increasing sophistication of its users.

PHASE I. PLANNING AND DESIGNING THE NEEDS ASSESSMENT

1.0 PRELIMINARY ACTIVITIES

- Set up needs assessment committee
- Determine scope of what is to be assessed
- Establish needs assessment schedule
- Review committee resources

Sections 1.1 through 1.4 describe each of these four activities. Follow them carefully.

1.1 SET UP NEEDS ASSESSMENT COMMITTEE

- Appoint committee chairperson
- Select two or three core committee members
- Hold initial committee meeting

One person needs to be in charge throughout the needs assessment process. That person should be the committee chairperson, who may be you or someone else with sufficient management skill, time, commitment, and initiative. To start with, choose two or three dedicated people who will help you shape and conduct the needs assessment and implement its results. Use the initial meeting to motivate the core members, agree on general areas of responsibility, and embark on sections 1.2, 1.3, and 1.4.

1.2 IDENTIFY ANY EXISTING PERFORMANCE STANDARDS AND OTHER EXTERNAL PRIORITIES OR LIMITING FACTORS

- Federal, state, and local.
- School district and school
- National, regional or local agencies

1.3 DETERMINE THE SCOPE OF WHAT IS TO BE ASSESSED

- Skill areas
- Grade levels
- Area boundary (class, school, subdistrict, district)

How elaborate or simple a needs assessment does the committee envision? You need to decide whether you will assess all four areas of basic skills, fewer than four, or several; whether you will assess needs at one grade level, or several; whether you will assess different skills at different grade levels; whether you will assess needs at one school, all schools within a subdistrict, or all schools within a district or even larger aggregation. It is advisable to make your decision in conjunction with sections 1.4 and 1.5 below. Be sure to document the reasons for your decision. (Title I applicants are required to justify any decision to leave out one or more areas.) Your final needs assessment report will need to include the rationale for these decisions.

1.4 ESTABLISH NEEDS ASSESSMENT SCHEDULE

- Schedule for overall needs assessment
- Schedule for each of the four phases

Set up a realistic schedule, taking into account the scope of the needs assessment (section 1.3) and the extent of the committee's resources (section 1.5). Pay special attention to the timetable for each phase, and make some allowance for delays and problems.

1.5 REVIEW COMMITTEE RESOURCES

- Given scope and schedule of needs assessment, consider adding more committee members
- Select any new committee members from among school staff, community members, parents, students

- Obtain financial and especially administration support for conducting the needs assessment and also for implementing the results.

- Assign specific tasks and responsibilites to committee members

There has to be a realistic balance, among needs assessment scope and schedule and your committee's resources. This is the time to determine that balance. Avoid an elaborate committee structure and an unnecessarily large membership. Your two or three core members may be all you need.

2.0 SPECIFIC PLANNING AND NEEDS ASSESSMENT DESIGN

2.1 SPECIFY PROCESS AND PRODUCT GOALS

- Establish performance standards--the level(s) of proficiency the students should have attained
- Establish methodology for determining actual student performance and current educational environment
- Establish methodology for gathering data and other information
- Establish methodology for analyzing data and other information to develop needs assessment

Sections 2.1 through 2.4 focus on these three critical activities, which, if followed, should provide the basis for an effective needs assessment based on manageable methodologies and a minimum of unnecessary data gathering

To determine goals, be careful to include goals both for the program itself (including faculty, administration, curriculum, etc.--we call these "Process Goals") and for the students (achievement, attitudes, behavior, etc.--we call these "Product Goals"). Also be sure to differentiate between short- and long-term goals, and be explicit about the length of the goal achievement period.

2.2 SPECIFY OBJECTIVES FOR THE PROGRAM

- Process objectives

  --Reading
  --Mathematics
  --Oral Communication
  --Written Communication

- Product objectives

  --Reading
  --Mathematics
  --Oral Communication
  --Written Communication

Determine both process and product-related objectives from the goals outlined in 2.1. Objectives should be well defined, clearly tied to either the program itself or to student performance. Note that the long-term/short-term question is not applicable to objectives.

2.3 SET STANDARDS FOR ALL OBJECTIVES

- Set criteria for determining whether process objectives have been met
- Set performance criteria for product objectives

  --Superior achievement
  --High achievement
  --Acceptable achievement
  --Marginal achievement
  --Unacceptable achievement

For each process objective, be sure to determine "how we will know when we get there." For each product objective, which relates to student performance attitudes, behavior, etc., identify skills, knowledge, and attitudes which your students are expected to display; determine levels of performance which the committee agrees are "superior--high--" etc. Set measures for each level of performance. Then determine what incidence of each performance level will be considered as "need." For example, if 55% of your students rate "marginal" in a particular skill, surely this would signify a "need" for some change in the educational program. But how about if only 10% were "marginal" and 70% were "superior" or "high"?

2.4 DISCUSS THE KINDS OF DATA NEEDED AND AGREE ON DATA TO BE GATHERED

- Locate and identify existing data

  --Surveys/test scores/evaluation reports/ student work samples
  --Decide on implications of missing data

- Specify new data to be gathered (descriptive, performance, achievement, opinion)

  --Curriculum descriptors
  --Staff development
  --Resources

By looking at available data, you will be able to decide what types of data you need. Decide whether you will need descriptive, performance, opinion, or all these types of data. Locate and identify data already available. Determine what missing data are necessary for inclusion in the assessment.

2.5 DETERMINE SOURCES OF NEEDED DATA

- School board administration (Minutes, resolutions, memoranda, directives, rules, etc.)
- Students (opinions, test scores, work samples)
- Parents (opinions, complaints, reports)
- Community institutions (records, reports, files, evaluations, placement decisions)

Find out from what sources new data can be obtained. School board policy statements, directives, etc., and school administrators frequently produce data which should be considered in reviewing objectives, goals, and current program performance. Be sure too to consider other institutions in the community, such as juvenile justice institutions, and even employers who place or reject students and graduates in part because of their perception of student achievement and basic skills ability.

2.6 DETERMINE SAMPLE FOR DATA GATHERING

- Groups to be assessed
- Sample sizes
- Sampling strategies/methods

It's highly desirable to consider data from the total school population in the needs assessment, wherever possible. However, to begin the assessment, select groups from which data will be gathered initially. Define sample groups carefully. Make proper use of random vs. stratified samples so that your data is not biased or skewed. (A random sample may consist of every third student in an alphabetical list, while a stratified sample may consist of all students whose aggregate achievement test scores are in the top or bottom quarter of the overall student population.)

2.7 DETERMINE DATA COLLECTION METHODS

- Select/modify appropriate published instruments (quantitative)

- --Tests/survey questionnaires/checklists

- Develop new instruments as needed (quantitative and qualitative)

  -- Tests/survey questionnaires/checklists

- Specialize methods of collecting nonquantitative data

  --Work samples reports naturalistic observations

Make decisions about the specific quantitative and qualitative tools and data collection instruments that you'll use in the assessment, such as those listed above. Review published instruments first for appropriateness in collecting the kinds of information you need; modify or rework published instruments as needed, or make new ones. Remember that the instruments themselves often affect the quality and validity of the data you'll collect.

2.8 DESIGN THE ANALYSIS OF EXISTING CURRICULUM STRATEGIES, PRESENTATION, AND RESOURCES

- Curriculum strategies

  --Organization and sequence
  --Reinforcement of basic skills in content areas
  --Allowance for varying learning levels
  --Integration of basic skills with each other

- Presentation of curriculum

  --Teaching practices
  --Personal teacher characteristics
  --Teacher attitudes toward students/school/program
  --Teacher competence
  --Teacher experience and education
  --Teacher development program

- Resources

  --Instructional staff (special education)
  --Auxiliary personnel
  --Texts/aids

--Media
--Special products
--Library
--Facilities/space/environment/administrative support

This is the point at which you'll take a detailed look at your educational curriculum, your teacher presentation of the curriculum, your administration and school environment, and numerous other variables. Examine each area listed above, carefully. Does what you find seem to indicate a need? (You may not be sure until you've also discovered unsatisfactory student performance and causal relationship between that poor performance and the apparent need in one of these categories, but your findings here will help guide your further research and data gathering.)

PHASE II. CONDUCTING THE NEEDS ASSESSMENT

3.0 OBTAIN, ORGANIZE, AND SUMMARIZE THE NEEDS ASSESSMENT DATA

3.1 CATEGORIZE ALL DATA TO BE COLLECTED

- Data on learner performance
- Data on curriculum and internal resources
- Data on institutions and external resources

As an initial categorization strategy, you may want to divide all data needed for your needs assessment into three distinct groups as suggested above. Within each of these groups you may also want, perhaps later on, to differentiate between existing data and data yet to be gathered.

3.2 COLLECT DATA ON LEARNER PERFORMANCE

- Existing data
- New data

Start with existing data; search and examine records, review test scores; examine samples; then move on to needed new data, administering questionnaires and surveys, perhaps defining new samples as appropriate, etc.

3.3 SUMMARIZE LEARNER PERFORMANCE DATA

- Organize all data by skill areas and objectives
- Display raw and summarized data on graphs, charts, and tables that show important relationships, ranges, trends, achievement levels, etc.

3.4 COLLECT DATA ON THE CURRICULUM AND INTERNAL RESOURCES

- Curriculum structure

  --Hierarchical sequencing of material
  --Behavioral objectives (stated in measurable terms)
  --Instructional activities
  --Materials and tests keyed to instructional objectives

- Instructional strategies

  --Individualized instruction (allowance for varied learning patterns and specific skills needs by individual students)
  --Grouping
  --Reinforcement
  --Monitoring of student's progress
  --Testing program (overall testing strategy, frequency, interrelationship of instruments)
  --Variety of learning experiences/methods of instruction

- Teacher Preparation - Staff Development
  --Instructional program planning
  --Supportive Teacher's Training
    - Pre-service
      --Formal
      --Informal
    - In-service
      --Formal
      --Informal
  --Evaluation (assessment/diagnosis/prescription)
  --Familiarity/use of curriculum and strategies defined above.

- Auxiliary in-school support staff
  --Special education staff
  --Specialized subject staff (phys.ed., art, music, industrial arts, etc.)
  --administrative staff (counseling, health, curriculum development, library, media, principal's office, etc.)
  --Coordination of support staff in basic skills

- Special target group programs

  --Federal programs (ESEA Title I, Title III, Title IV-C)
  --State programs
  --District Programs
  --Local school programs

3.5 SUMMARIZE DATA ON CURRICULUM AND INTERNAL RESOURCES

- Assemble data on each item above and relate to each basic skill included in the assessment

- Categorize data by assessment sample division (grade, school, class, etc.)

You've already defined your goals and objectives in terms of program, curriculum, and student performance. Now you're looking at the substance of the educational process--the "what" of school for the student. You're examining what is taught, how it is taught, and with what kind and level of internal resources. We try to keep "internal" and "external" resources distinct--internal includes those resources like teachers, support staff, materials, aids, and specialized services which are performed or used inside the school.

3.6 COLLECT DATA ON INSTITUTIONS AND EXTERNAL RESOURCES

- School identification data

  --Name of school
  --Address
  --Telephone number
  --Name of superintendent
  --Name of principal
  --Name/location of district

- Student/family/community profile data

  --Socioeconomic status of district
  --Housing patterns
  --Employment/unemployment patterns of parents
  --Parental education patterns
  --Student age level employment patterns

- Parental involvement in education

  -- Active in PTA activities
  --Volunteers in school functions and learning activities
  --Participates in teacher's conferences

- Other community institutions affecting students

  --Juvenile justice institutions
  --Religious institutions
  --Civic/social institutions (Jaycees/YMCA-HA/etc.)
  --Community arts/recreation programs, libraries, etc.

At this point you are gathering data on "external" resources--those institutions, people, organizations, programs, etc. which operate primarily outside the school program, but which can play distinctive, important roles in either supporting and reinforcing the school curriculum and its educational process, or undercutting it. Be sure for each data element above that if you decide to gather and incorporate it into your needs assessment, you have a clear picture of how it relates to the school program and to student performance.

3.7 SUMMARIZE DATA ON INSTITUTIONS AND EXTERNAL RESOURCES

- Organize data by heading (3.6)
- Perform all necessary mathematics on quantitative data to form relevant sums, ratios, products, etc. within elements
- Map out relationships between student performance, curriculum, internal resources, and external resources

4.0 ORGANIZE AND INTERPRET THE DATA

4.1 ORGANIZE THE DATA

- Perform all mathematic operations on the data to obtain relevant sums, products, quotients, ratios, trends, patterns, averages, rankings, distributions, etc.
- Arrange data displays to make relationships between various data elements visible
- Analyze qualitative data by digesting it and producing written summaries, samples, content characterizations, etc.
- Identify missing data and agree on strategies to obtain them

At this point you employ your arithmetic and statistical analysis techniques to derive quantitative and qualitative meanings from the data you've collected. You arrange and rearrange your data in ways that clarify various "so-whats?" Where you cannot derive meaning quantitatively, you'll identify specific qualitative data elements and their relationship to your program's goals, objectives, standards, etc. Summaries, samples, and descriptions are sometimes the best that can be derived from qualitative data.

4.2 INTERPRET THE DATA

4.2.1 INTERPRET DATA ON STUDENT PERFORMANCE

- Compare data on results to performance standards
- Define Gaps between objective standards and performance standards as "NEEDS"; identify NEEDS in each skill area, for each unit of the population being studied

Our definition of "need" is very simple. Where student performance (whether measured quantitatively or qualitatively) does not meet or exceed the standards previously established for each learning objective, the "need" is to improve student performance to the point where that gap is eliminated. However, in the next steps of the BSNAP model, we'll be translating "needs" expressed in terms of student performance improvements into needs for various other specific things, such as resources, curriculum change, etc.

4.2.2 INTERPRET DATA ON CURRICULUM AND INTERNAL/EXTERNAL RESOURCES

- Associate summarized data on curriculum with specific student performance needs as defined above; pinpoint curriculum segments that are not producing desired student performance
- Associate resource allocations (both internal and external) with the student performance need areas as defined above; try to determine whether student performance in each area of "need" is a function of quantity of resources, quality of resources, or both

5.0 CONDUCT CAUSAL ANALYSIS

- Conduct causal analysis

The Causal Analysis is an effort to pinpoint the cause-effect relationships between specific factors (curriculum design, presentation, teacher preparation, administrative support, parental support, community support) and specific student performance need areas. While application of experience and common sense is usually the best starting point, one approach is to identify trend relationships between student performance and other factors. Thus we may discover that student performance in certain math skills dropped at a time when treatment of skill development in those areas were deemphasized, and less time was spent on them in classroom instruction.

Another level of causal analysis may be necessary in some cases. You may need to move from "proximate cause" of a particular student performance need to "ultimate cause". For example, needs for student improvement in sentence construction or vocabulary skills may be attributed "proximately" to a decrease in class time spent on these skills, suggesting an adjustment to the curriculum. However, the "ultimate" problem may be a too-high student/teacher ratio (where teachers must provide so much individual help for his/her 34 students that there simply is no more time available for treatment of this subject).

5.1 DETERMINE EXISTING CAUSAL FACTORS FOR STUDENT PERFORMANCE GAPS VIS-A-VIS STANDARDS IN EACH SKILL AREA.

- Reading skills
- Mathematics skills
- Oral communication skills
- Written communications skills

5.2
- DETERMINE WHICH STUDENT PERFORMANCE NEEDS APPEAR TO BE CAUSED BY STUDENT-RELATED FACTORS
- Lack of prior preparation
- Day-to-day unpreparedness for class
- Behavior problems

5.3 DETERMINE WHICH STUDENT PERFORMANCE NEEDS APPEAR TO BE CAUSED BY CURRICULUM FACTORS.

- Inadequate instruction time on the subject or skill
- Inappropriate instructional strategy or teaching methods
- Poor materials or lack of them
- Improper sequencing

5.4 DETERMINE WHICH STUDENT PERFORMANCE NEEDS APPEAR TO BE CAUSED BY TEACHERS/STAFF.

- Teacher mastery of content
- Teacher presentation skills
- Teacher instructional planning skills
- Teacher evaluation/diagnosis skills
- Teacher management skills
  --individualization
  --grouping for instruction
- Inadequacies of support staff
- Numbers of teachers/support staff

5.5 DETERMINE WHICH STUDENT PERFORMANCE NEEDS APPEAR TO BE CAUSED BY ENVIRONMENTAL FACTORS.

- Parental participation/support
- Community environment (unemployment, crime, etc.)
- Lack of supportive community programs (juvenile justice, recreation, arts, etc.)

5.6 DETERMINE WHICH NEEDS ARE CAUSED BY FACTOR WHICH CAN BE ADDRESSED WITHIN THE SCHOOL PROGRAM BY SCHOOL STAFF.

- Consider accepted school program mandates, authorities, responsibilities, resources
- Consider existing and potential linkages among school, parents, and community resources

5.7 DETERMINE WHICH NEEDS ARE CAUSED BY FACTORS THAT CANNOT BE ADDRESSED

- Can the school program impact the need directly?
- Are there alternatives to direct intervention?

5.8 DETERMINE WHICH NEEDS CAN BE ADDRESSED AND FULFILLED IMMEDIATELY, WHICH CAN BE ADDRESSED LATER OR OVER EXTENDED PERIODS OF TIME, AND WHICH CANNOT BE ATTACKED SUCCESSFULLY AT ALL

PHASE III. USING THE NEEDS ASSESSMENT RESULTS

6.0 SELECT PRIORITIES

6.1 ASSIGN SPECIFIC PRIORITIES TO EACH NEED/CAUSE(S) SET WITHIN A BASIC SKILLS AREA

6.2 ASSIGN PRIORITIES FOR APPLICATION OF BASIC SKILLS TO CONTENT AREAS AND FOR COORDINATION OF BASIC SKILLS INSTRUCTION

6.3 ASSIGN PRIORITIES FOR INSTRUCTIONAL EMPHASIS AND CURRICULUM CHANGE

6.4 ASSIGN PRIORITIES FOR STAFF DEVELOPMENT ACTIVITIES AND FOR ACQUIRING ADDITIONAL RESOURCES

When a needs assessment has been completed and a list of needs developed, you'll have to make decisions about which needs should be addressed in what order. All needs may appear important, but some are probably more critical than others. Varying priorities should be assigned based on criticality over time (that is, first priority should be assigned to the need which is deemed most critical right now, second to a need which is perhaps equally critical over the long run, but not so immediate, etc.) Consider the currently available resources, limits of action authority, etc.

COORDINATION IN BASIC SKILLS INSTRUCTION:
A CONSTANT PRIORITY!

When you review the needs you've defined in terms of student performance, and tied those needs to proximate and ultimate causal factors, you'll be able to identify and assign priorities to each needed change to curriculum, to staff, to other resources, to the school environment, community conditions, even to the students themselves.

However, one constructive action which appears to be needed in almost every situation where needs assessments are done is IMPROVED COORDINATION IN BASIC SKILLS INSTRUCTION.

We're talking about teachers working together, usually under the enlightened leadership of strong administration and curriculum staff, to work out ways to reinforce and support basic skills instruction and development.

We're talking about mutual reinforcement among the four Basic Skills areas. We're talking about basic skills in oral communication classes being reinforced in reading classes, for example.

In this particular Basic Skills needs assessment model, coordination is not only a requirement, but vital to the effective implementation of the model steps. The NAC should build a coordination component into its planning activities and ensure that coordination is given a high priority throughout the needs assessment process. This means that teachers, administrators, parents, and community members will be working side-by-side from the initial planning efforts through the implementation of those efforts. This prevents duplication of effort and in the long run results in more effective program planning in all four areas.

7.0 PROGRAM PLANNING

7.1 GIVEN PRIORITIES ASSIGNED ABOVE, IDENTIFY WHICH PROGRAM ELEMENTS ARE TO BE MODIFIED AND THE SPECIFIC MODIFICATIONS TO BE MADE

7.2 ALLOCATE RESOURCES TO THE PRESCRIBED PROGRAM ELEMENT MODIFICATIONS, BY PRIORITY AND RELATIVE RESOURCE COST

It may be helpful to try to determine which changes, modifications and improvements can be made with available resources, and which can only be begun. Try to determine where the application of available resources can have the greatest impact on current needs.

7.3 PROVIDE FOR COORDINATION OF RESOURCES (TO AVOID DISCONNECTED AND DUPLICATIVE EFFORTS WHICH HAVE LITTLE IMPACT)

7.4 ASSIGN MODIFICATION/DEVELOPMENT TASKS TO INDIVIDUALS, TEAMS, AND GROUPS

7.5 ESTABLISH OBJECTIVES OF EACH MODIFICATION/DEVELOPMENT TASK THUS ASSIGNED, AND TIMELINES AND MILESTONES FOR THE ACCOMPLISHMENT OF EACH OBJECTIVE

Remember the commitment made at the outset to use the results of the needs assessment! You're now ready to use those results. You'll need to decide which resources can be used to address each need, and check with other program and curriculum areas to see what can be shared and how resources can be coordinated to benefit student performance most dramatically. Be sure to establish realistic expectations on the time required to carry out each change or modification, and to assign specific responsibility for each change action.

8.0 PROGRAM IMPLEMENTATION

8.1 PROVIDE RESOURCES FOR PROGRAM CHANGE IN ACCORDANCE WITH DEFINED NEEDS AND PRIORITY ASSIGNMENTS

8.2 CONDUCT NEWLY REVISED INSTRUCTIONAL ACTIVITIES

8.3 CONDUCT PRESCRIBED STAFF DEVELOPMENT ACTIVITIES

8.4 MAKE OTHER IDENTIFIED CHANGES IN SCHOOL PROGRAM, STAFF, ENVIRONMENT

8.5 FOR EACH CHANGE OR DEVELOPMENT NOW BEING IMPLEMENTED, IDENTIFY SPECIFIC STUDENT PERFORMANCE IMPROVEMENT OBJECTIVES, MEASURES FOR THE IMPROVEMENT, AND MEANS OF FATHERING DATA TO DETERMINE WHETHER THE DESIRED CHANGE ACTUALLY TAKES PLACE

Using the plans you've set up in the eighth step of the BSNAP Model, you'll now begin the change process, by allocating the available resources to specific change activities. Be sure to coordinate program elements and strategies; conduct staff development and teacher training workshops; identify and apply alternatives where needed resources are not available; make changes in staff assignments and roles, where necessary; integrate change efforts in an overall plan and set up a monitoring schedule to check progress at major milestone points.

PHASE IV. REVIEW OF THE BSNAP PROCESS--META-ASSESSMENT

9.0 DETERMINE THE IMPACT OF THE CHANGE PROCESS

9.1 DETERMINE WHAT INDICATORS WILL BE ACCEPTED AS EVIDENCE OF IMPROVEMENT

- Test scores (specific statistical gains)
- Student behavior pattern changes
- Parental involvement and reinforcement
- Grade-level achievement norms
- Other indicators

9.2 GATHER DATA TO DETERMINE WHAT IMPROVEMENTS ARE DISCERNIBLE

9.3 DETERMINE RELATIONSHIPS BETWEEN OBSERVED IMPROVEMENTS AND PROGRAM CHANGES MADE IN STEPS SEVEN AND EIGHT OF THE MODEL

- Did the changes clearly produce the improvements?
- Were the changes only partial or indirect causes of the improvements?
- Were the changes probably only coincidental with the observed improvements?

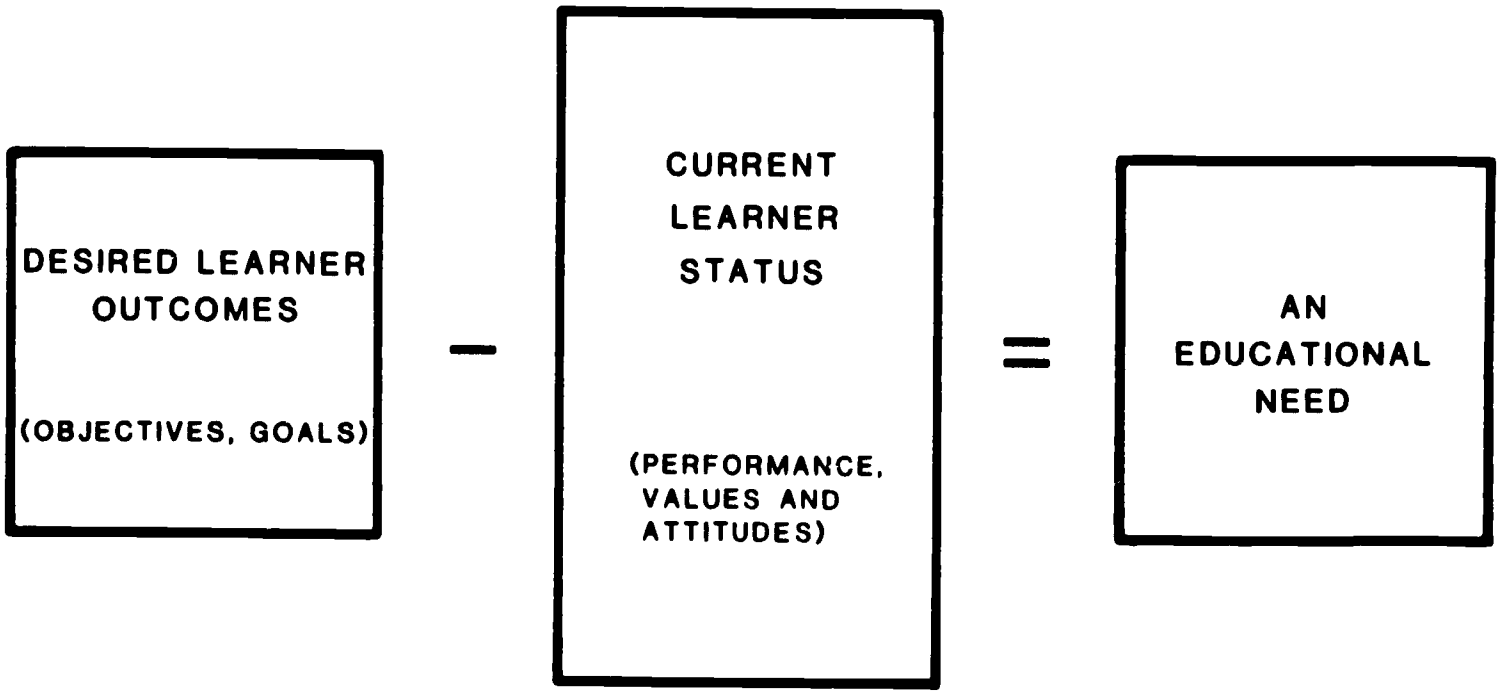
9.4 RELATE THE OBSERVED IMPROVEMENTS TO THE NEEDS IDENTIFIED IN STEP FOUR OF THE MODEL

- Did we eliminate the needs we identified earlier, or make other types of improvements?

During this final step in the model process, we conduct not another needs assessment, but a "meta-assessment" -- an assessment of the assessment. We try to determine the success of our process in identifying, attacking, and eliminating specific basic skills needs, which we identified first in terms of discrete improvements in student performance, and then, through causal analysis, as needs for specific changes in the curriculum, the students themselves, the school environment, the staff, and supporting resources. We must be ready to discover that we did not in fact eliminate the needs we first defined, but created other changes, and sometimes other improvements, some of which may have been unanticipated. The point here is to look back at the process as a whole, relate its results to its objectives, and determine the extent to which it has succeeded, and the changes that should be made to the process to have it succeed even more during the next needs assessment cycle.

Figure 1

DETERMINING EDUCATIONAL NEEDS

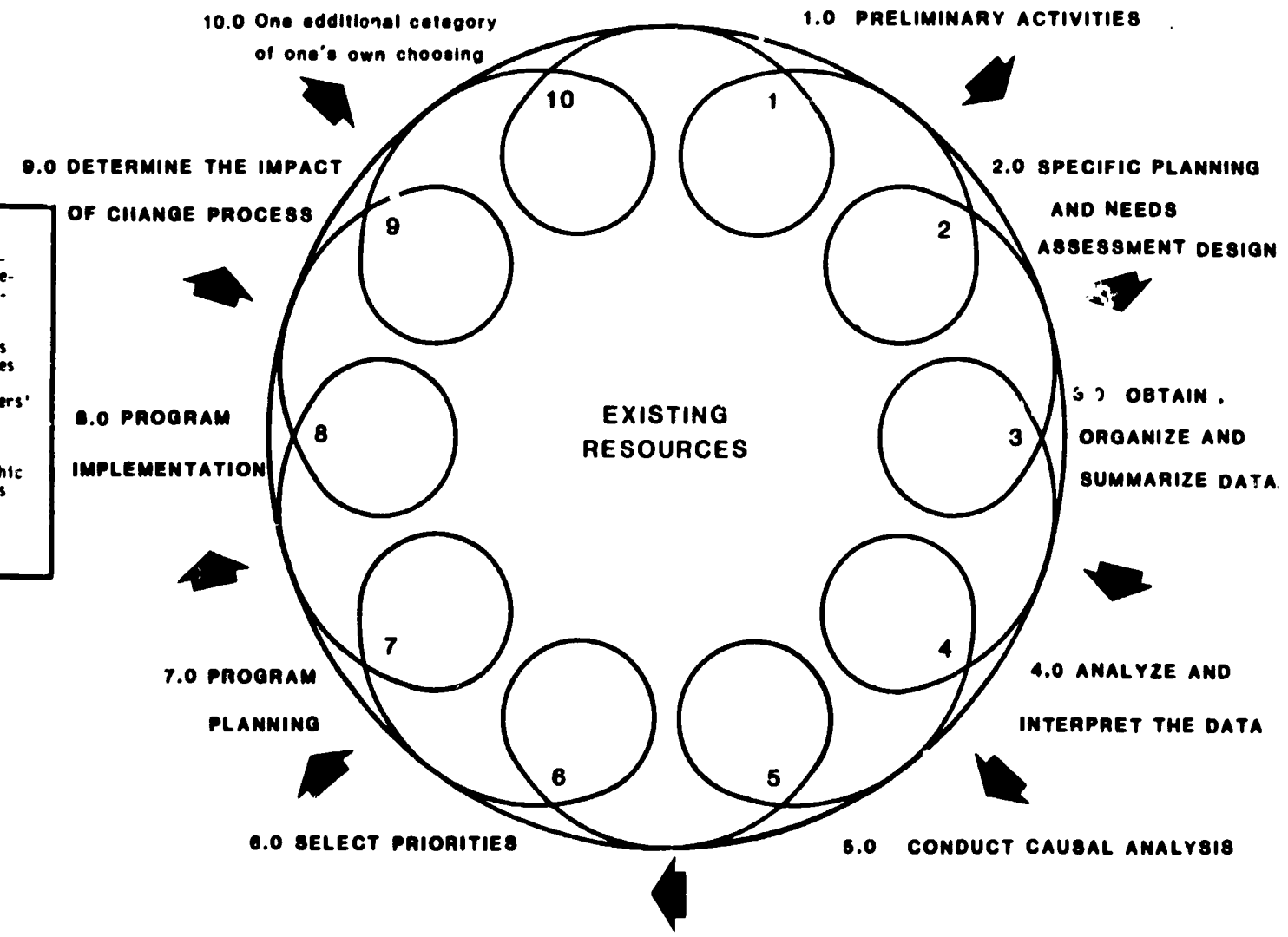


Adapted from: Hershkowitz, Martin, ed. Statewide Educational Needs Assessment. Results From Selected States. Silver Spring, Maryland: Consortium of State Education Agencies, 1974.

Figure 2

DYNAMIC INTEGRATION OF A NEEDS ASSESSMENT AND PLANNING MODEL

CONCEPTUAL EFFORT



The diagram on the right shows the cyclical nature of the needs assessment process described in this Guidebook. For this process to be effective, the practitioner should carefully follow, in sequence, the ten steps. The larger circle represents existing resources; the small circles within the larger circle depict the steps necessary to assess the learners' needs. Each step uses existing resources to meet learners' needs.

The diagram purports to give a graphic view of the interdependence of needs assessment and existing resources. The following pages provide a more detailed description of the model.

SECTION IV

MODEL IMPLEMENTATION

DETAILED GUIDANCE AND SAMPLE WORKSHEETS FOR USE IN CARRYING OUT A NEEDS ASSESSMENT IN ACCORDANCE WITH THE BSNAP MODEL

This section will provide guidance and worksheets, as the title states, where it was felt that additional instruction might be helpful to the user. As you turn the pages of this section, you'll note that descriptive and instructional material is contained on the left-side of the pages and sample worksheets or other reference materials are on the right side of the pages.

This section is offered as an additional help to BSNAP model users. It is not assumed that all users will need to follow all instructions contained in this section, or that all sample worksheets and forms will prove useful in all cases. In many cases, you may decide to create worksheets customized to your own situation. Such worksheets may appear quite different from those contained herein, and still be entirely valid and appropriate to your needs.

Each sample worksheet contained in this section is referenced to a specific subsection of the BSNAP Model contained in the previous section, in order to clarify its relationship to the model process. So, if you decide you'd like additional guidance on developing product objectives for the four basic skills areas, (Section 2.2 of the BSNAP Model) look for the designation "2.2 (Specific Planning)" at the upper left corner of the pages of this section.

This model was developed with a view toward integrating as much of the current state of the art of needs assessment as possible, and to be useful to as many potential users as possible. However, the authors emphasize the need for each user to be imaginative, creative, and innovative in his/her application of the model. In that way, the model can grow and live along with the increasing sophistication of its users.

In setting up the Needs Assessment Committee, you'll want to call an organizational meeting about one month before school starts. A list of organizational activities follows. You may want to make your own list and prioritize the items somewhat differently.

1. Obtain the school principal's commitment to lead the Needs Assessment Committee;

2. Inform the community about the Needs Assessment (NA);

3. Explore all avenues for publicity for the Needs Assessment;

4. Contact PTA/PTO representatives and representatives of all school-related organizations. Obtain their support and cooperation;

5. Contact community organizations; find their meeting schedules and newsletter publication dates; meet with them personally to discuss NA;

6. Send notices to parents (perhaps the same announcement that is published in the school newspaper;)

7. Contact and establish working relationship with the Parent Advisory Council or similar group;

8. Select school staff, community members, parents, and students to act as Needs Assessment Committee members;

9. Obtain necessary financial support and a shared commitment from all participants to carry out the results of the NA. This is <u>extremely important</u>; and

10. Assign specific tasks to members of the committee.

The worksheets on the following pages are provided for use in carrying out the general planning activities summarized above and in the model, Section 1.0. The steps listed above are suggestions only. Don't feel constrained to follow them religiously.

BSNAP MODEL
T.O PRELIMINARY ACTIVITIES
(1 of 2)

SAMPLE # 1

WORKSHEET FOR CONDUCTING PRELIMINARY ACTIVITIES

1. Who will be on the Needs Assessment Committee? (Establish a roster by name, position, address and phone number. If there is a person for the same field indicate the number.)	(Check) ____ Local School District Administrative Personnel ____ Teachers ____ Parents ____ School Principal/Curriculum Staff ____ Cultural Leaders ____ Representatives of Public Interest Groups ____ Representatives of Business Organizations ____ Representatives of Private Non-Profit Schools ____ (Other)_____
2. What tasks and responsibilities will be assigned to the committee members? (Negotiate written task assignments and commitments for completion of each task.)	(Check) ____ Reviewing proposals and plans ____ Identifying current program goals, objectives, stds. ____ Determining data requirements ____ Evaluating the current program ____ Advising in program development ____ Coordinating funding ____ Obtaining public support ____ Planning teacher training activities ____ (Other)_____
3. What regulations exist that limit or confine the planning of the needs assessment? (Identify them and obtain copies.)	(Check) ____ Federal Regulations ____ State Regulations ____ School District Regulations ____ Local School Rules & Procedures
4. What basic skills areas will be addressed? (Justify your decision.)	(Check) ____ Reading ____ Oral Communication ____ Written Communication ____ Mathematics

BSNAP MODEL
1.0 PRELIMINARY ACTIVITIES
(2 of 2)

SAMPLE # 1

WORKSHEET FOR CONDUCTING PRELIMINARY ACTIVITIES

5. What grade levels will be assessed? (Justify your decision.)	(Check) ____ K-3 ____ K-8 ____ 5-8 ____ 9-12 ____ (Other)_____ (Justification)_____ _____ _____
6. How much time is allotted to conduct the Needs Assessment?	(Check) ____ One Month ____ Two Months ____ Four Months ____ Six Months ____ (Other)_____

OUTPUTS OF THIS STEP *

1. ROSTER of Needs Assessment Committee Members (Name, Position, Address, Phone)
2. LIST of General Planning Assignments for each member, with agreed completion date.
3. COPIES of Regulations which impact the Needs Assessment Process (Fed/State/District/Local, etc.)
4. SPECIFICATION of basic skills areas and grade levels to be assessed.
5. SCHEDULE for the overall Needs Assessment.

* For each step in the model, make a similar list of outputs as the example above for step 1.

DEFINING LEARNER GOALS AND OBJECTIVES

If the purpose of conducting needs assessments is to discover learner needs which are unmet by the current educational program and revise or improve the program in some way to meet those needs, then the first step of the process after the preliminary planning activities is to define the goals and objectives currently held by the school or school district for its learners. Later we will define "needs" as the difference between these goals and objectives and actual learner performance.

In developing the BSNAP Model, we've differentiated between long and short-term goals, and between process and product goals and objectives. Our goal statements are broader, less specific than objectives, and one or more of our objectives spring logically from each goal, or at least relate logically to a goal.

- LONG-TERM GOALS are those which we plan to achieve over a period of two or more years.
- SHORT-TERM GOALS are those which we plan to achieve over a period of up to one year.
- PROCESS GOALS/OBJECTIVES are those which describe the educational process itself, rather than "outcomes" or "products" of the process.
- PRODUCT GOALS/OBJECTIVES are those which define things that learners are (will be) able to do as a result of the education process.

The clarity, precision, measurability, feasibility, appropriateness, relevance and logic of objectives statements are critically important to our ability to evaluate educational programs and to perform needs assessments. Take special care, therefore, to assure that your statements of objectives have these characteristics!

The SPECIFIC PLANNING WORKSHEET facing this page asks you to define long and short-term product and process goals and objectives, and performance standards for each objective, for five levels of student performance. On the following page, you'll find specimen product and process goals developed by a State Education Agency. Compare ythem to your own, and see which set is clearer. more precise, more measureable, etc.

THE NEW JERSEY NEEDS ASSESSMENT ADVISORY COUNCIL GOALS

A. Outcome Goals

The public schools of New Jersey should help its citizens:

- To acquire basic skills in obtaining information, solving problems, thinking critically and communicating effectively.
- To acquire a stock of basic information concerning the principles of the physical, biological and social sciences, the historical record of human achievements and failures, and current social issues.
- To become an effective and responsible contributor to the decision-making processes of the political and other institutions of the community, state, country and world.
- To acquire the knowledge, skills and understandings that permit him/her to play a satisfying and responsible role as both producer and consumer.
- To acquire the ability to form satisfying and responsible relationships with a wide range of other people, including but not limited to those with social and cultural characteristics different from his/her own.
- To acquire the capacities for playing satisfying and responsible roles in family life.
- To acquire the knowledge, habits and attitudes that promote personal and public health, both physical and mental.
- To acquire the ability and the desire to express himself/herself creatively in one or more of the arts, and to appreciate the esthetic expressions of other people.
- To acquire an understanding of ethical principles and values, and the ability to apply them to his/her own life.
- To develop an understanding of his/her own worth, abilities, potentialities and limitations.

B. Process Goals

The public schools of New Jersey should:

- Insure that all instruction bears a meaningful relationship to the present or future needs and/or interests of students.
- Insure that each student has significant opportunities, consistent with his/her age, for helping to determine the nature of his/her educational experiences.
- Insure that specialized and individualized kinds of educational experiences are available for meeting the particular needs of every student.
- Insure that teachers and students have significant opportunities for participating in the decisions affecting the operations of the schools they work in or attend.
- Provide comprehensive guidance facilities and services of high quality for every student.
- Seek to structure competition among students in ways that are less harmful than present practices are.
- Insure that the resources available for education are used with maximum efficiency.
- Insure that instructional, administrative and support staffs are of high quality in every respect.
- Develop and utilize diverse forms of constructive cooperation with parents and community groups.

SAMPLE # 2

SPECIFIC PLANNING WORKSHEET

1. For each basic skill area to be assessed, what are the school board's long term goals (long term = 2 years or more)?

   (Differentiate between process goals which relate to the education program and product goals, which relate to student performance.)

2. For each basic skill area to be assessed, what are the school board's short term goals (short term = 1 school year).

   (Again, differentiate between process and product goals.)

3. For each basic skill area to be assessed, what are the learner objectives implied by the long and short-term goals stated above?

   (Use extra sheets as needed.)

4. For each basic skill area to be assessed, what standards or criteria will be used to define:

   SUPERIOR Learner Performance

Superior

SAMPLE # 2 (cont'd)

SPECIFIC PLANNING WORKSHEET

HIGH Learner Performance	High
ACCEPTABLE Learner Performance	Acceptable
MARGINAL (LOW) Learner Performance	Marginal
UNACCEPTABLE Learner Performance	Unacceptable
5. What courses are offered within the curriculum for each basic skill area being assessed?	Reading: Oral Communication: Written Communication: Mathematics:

SAMPLE # 2 (cont'd)

SPECIFIC PLANNING WORKSHEET

6. What kinds of crossover reinforcement or integration is occurring among the basic skills within the current curriculum?

   ex. Are oral reports required in the reading curriculum?

   ex. Are correct spelling and sentence structure required in the social studies student products?

7. What materials and equipment are available for instruction in each of the basic skills being assessed?

   (It may be helpful to note type, quantity and quality of equipment now available. Quantity can be expressed in units per student/user and quality expressed simply as "operational/marginal/non-operational".)

Reading:

Oral Communication:

Written Communication:

Mathematics:

INTEGRATION OF BASIC SKILLS IN CURRICULUM SUBJECT AREAS

At several places in this handbook the authors have emphasized the need for coordination and integration of the four basic skills in various traditional curriculum subject areas. The matrix shown below provides an illustration of the extent to which teachers of discrete subjects should plan to reinforce each other in developing students' basic skills. Pay special attention to this problem in working through your specific Needs Assessment planning.

SUBJECT AREA	READING	ORAL COMMUNICATION	WRITTEN COMMUNICATION	MATHEMATICS
MATHEMATICS	●	●	●	●
SCIENCES	●	●	●	●
SOCIAL STUDIES	●	●	●	
HOME ECONOMICS	●	●	●	●
HEALTH	●	●	●	●
ART			●	●
MUSIC	●	●		●
DRAMA/THEATER	●	●		
INDUSTRIAL ARTS	●		●	●
BUSINESS EDUC.	●	●	●	●
HISTORY/CIVICS	●	●	●	

The matrix intersections which are filled in above indicate significant opportunities to reinforce the particular basic skill in the school subject areas shown. You may decide that you can even reinforce certain basic skills from subjects where no indication is shown on this matrix. The point here is to assure that your faculty is aware of these opportunities, and are making use of them, in a coherent, conscious, planned way.

BSNAP MODEL

2.4 DISCUSS THE KINDS OF DATA NEEDED AND AGREE ON DATA TO BE GATHERED (1 of 2)

SAMPLE # 3

WORKSHEET FOR DETERMINING DATA REQUIREMENTS

1. What kinds of data do you need? (See following matrix for Data Types, Sources, and Methods).

___ Descriptive
___ Performance
___ Opinion

2. For each data item deemed necessary, note at the right whether it is currently available, accessible, only partially accessible, or not accessible at all. ("Accessible" = we can gather it, but it's not in hand at this moment.)

Data Item	Available	Fully Accessible	Partially Accessible	Not Accessible

3. What are the implications of the non-accessible data for the needs assessment?

(Disastrous, Damaging, but we can cope with it, or Insignificant)

4. For all new data to be gathered, name the data elements, their source, population group on which the data will be gathered, and sample size and method.

Data Item	Source	Pop.Group	Sample Size	Method

BSNAP MODEL

2.4 DISCUSS THE KINDS OF DATA NEEDED AND AGREE ON DATA TO BE GATHERED (2 of 2)

SAMPLE # 3 (cont'd)

WORKSHEET FOR DETERMINING DATA REQUIREMENTS

5. What published (existing) instruments or tools will you use or modify to collect the needed quantitative data?	_____ _____ _____ _____ _____ _____
6. What new instruments will you need to develop to gather quantitative data?	_____ _____ _____ _____ _____
7. How will you collect the non-quantitative data needed for the assessment?	(check) ____ Opinion surveys ____ Attitude Surveys ____ Interviews ____ Naturalistic Observation ____ (Other)_____

DETERMINING NEEDS ASSESSMENT DATA REQUIREMENTS

The following list provides a typology of data you may need in doing your Needs Assessment. It shows source and methods of collection for each item of data in three categories: (1) Learner, (2) Institutions, and (3) School/ Community.

(1) LEARNER	SOURCES	METHODS OF COLLECTION
Performance Data (Status) Achievement test data, behavioral data, dropout rates, statistics on vandalism, grades	Students' Records	Standardized tests Criterion-Referenced Tests Grade-Point Averages Examination of Student Work
Descriptive Data (Status) Socioeconomic status, description of student population (i.e. minority, disadvantaged, etc.) mobility of student population, ethnic and language groups	School Records	Demographic profiles
Opinion/Attitude/Perception Data (Status & Desired States) Student self-perceptions, attitudes on school/learning; parent and teacher attitudes on learning conditions, teacher assumptions on learning, teacher opinions on performance standards, learner goal/objective preferences.	Students Teacher Interviews	Surveys (e.g. students' opinions on what they know or can do. Surveys of teachers opinions on student performance variables not measured by tests. Rating scales on desired objectives
(2) INSTITUTIONS Staff turnover, capacity for renewal & problem-solving, productivity, staff in-service record, institutional support for prior projects, etc.	Teachers	Group Interviews Survey questionnaires on school goals.
Opinion Staff morale; attitudes on self & profession; institutional assumptions; student/community attitudes toward institutions; staff, student, community perceptions of school climate; estimates of future directions, trends, etc.	Teacher Interviews Community Group Interviews	Group meetings using card sorts Analysis of program costs Interview and Questionnaires

(2) INSTITUTIONS	SOURCES	METHODS OF COLLECTION
Descriptive		
Curriculum size, age-span, instructional groups, cur icular and non-curricular offerings, transportation, staffing pattern and descriptors, support services physical plant, budget, tax support, per-pupil expenditures, decision-making structure, governance structure, resources available.	School Administration	Rating on scales, school problems, school climate, Opinion surveys on goal performance
(3) SCHOOL - COMMUNITY		
Performance		
Community participation (i.e. volunteers, use of plant,) record of advisory council participation and achievement, PTA impact, responsiveness of school and community to each other.	School Administration	Telephone Surveys Surveys Group Interviews
Descriptive		
Demographic data on such census data/growth patterns and projections, services, political relations, power structure, etc.	School Board	None. Depends on what is available.
Opinion		
Media attitudes about schools; community attitudes, teachers, and students; school attitudes toward community, projections concerning future status of community or society.	Local Institution (outside)	

BSNAP MODEL
3.0 OBTAIN AND ORGANIZE THE NEEDS ASSESSMENT DATA
(1 of 2)

SAMPLE # 4

WORKSHEET FOR COLLECTION AND ORGANIZING THE NEEDS ASSESSMENT DATA

1. Has the necessary data been collected?

If your answer is 'yes', write down the information requested.

EXISTING DATA

Std. Test Scores

Student Work Samples

Information from Records

(Other)

NEW DATA

Student Attitude Surveys

Parent Surveys

Opinion Questionnaires

(Other)

BSNAP MODEL
3.0 OBTAIN AND ORGANIZE
NEEDS ASSESSMENT DATA
(2 of 2)

SAMPLE # 4 (cont'd)

WORKSHEET FOR COLLECTING AND ORGANIZING THE NEEDS ASSESSMENT DATA

2. What basic skills programs or projects currently exist in your school (or school district)?

_____
_____
_____
_____
_____

3. What resources might potentially be used to meet student needs?

FINANCIAL RESOURCES

_____ ESEA Title I
_____ ESEA Title IV-C
_____ ESEA Title III
_____ Other Federal Funding
_____ State Funding (Specify)_____
_____ District Funding (Specify)_____
_____ Local School Funding (Specify)_____
_____ Other (Specify) _____

SUPPORT SERVICES

_____ Curriculum Specialist Services
_____ Counseling Services (for Students)
_____ Staff Development Training/Workshops
_____ Library Services
_____ Other (Specify)_____
_____

4. What is available within the curriculum at present to meet student needs?

_____
_____
_____
_____
_____

COLLECT AND ANALYZE THE DATA

1. How do you plan to code the data to permit or facilitate appropriate analysis?

Form will list all students tested; subdivided by grade, school, and score for each assessment item.

For example:

School A

Instruments Used					
Student	1	2	3	4	5
Student ID #					
Grade Level I					
Grade Level II					
Grade Level III					

School B

Instruments Used					
Student	1	2	3	4	5
Student ID #					
Grade Level I					
Grade Level II					
Grade Level III					

2. How do you plan to analyze the data?

Across all instruments, depending on level of measurement by schools and grade level and comparisons (where possible) to state information.

Be sure that all data to be collected are directly related to the goals and objectives of the needs assessment. Listed on the opposite page are some types of data you'll have collected, both existing and new. List and describe the data without recapitulation, in this or a similar format whichever is most useful to you.

BSNAP MODEL
4.0 ANALYZE AND INTERPRET THE DATA
(1 of 1)

SAMPLE # 5

WORKSHEET FOR INTERPRETING THE DATA: DETERMINING STUDENT NEEDS

1. Compare data analysis findings with each established performance objective for each performance level.

   STANDARDS
   - ACTUAL PERFORMANCE

   NEED

Basic Skill Area: _____
Grade Level: _____
Student Performance Objective: _____

Performance Criterion (Superior): _____

Actual Student Performance: _____

NEED: _____

Performance Criterion (High): _____

Actual Student Performance: _____

NEED: _____

(repeat for each criterion, each objective)

2. What resources might be used to meet these needs?

Existing Programs/Projects _____

Alternative Programs/Projects _____

Funding Sources _____

New/Revised Materials _____

Personnel Development _____

SAMPLE #6

WORKSHEET FOR CONDUCTING A CAUSAL ANALYSIS

1. Why are the student performance levels lower than the established standards? What are the barriers?

   Student Factors?
   Teacher/School Factors?
   Environmental/Institutional Factors?
   Other Factors?

Basic Skill Area _____
Grade Level _____
(Check the appropriate barriers to performance)

Student Factors:
____ Poor study habits
____ Unpreparedness
____ Home environment does not encourage learning
____ (Other)_____

Teacher/School Factors
____ Poor institutional materials
____ Inadequate staff
____ Poor instructional methods
____ (Other)_____

Environmental/Institutional:
____ Lack of coordination of programs
____ Lack of resources
____ (Other)_____

Other_____

2. Which of these barriers can be immediately removed? How?

1. _____
2. _____
3. _____

SAMPLE # 6

WORKSHEET FOR CONDUCTING A CAUSAL ANALYSIS

3. Which of these barriers cannot be addressed in the short term? Why?	1. _____ 2. _____ 3. _____
4. What alternative steps must be taken in cases where the barriers can be removed only over a longer period (2 yrs. or more).	Alternative Steps: 1. _____ 2. _____ 3. _____

BSNAP MODEL
6.0 SELECTING PRIORITIES
(1 of 1)

SAMPLE #7

WORKSHEET FOR SELECTING PRIORITIES

1. What are the most important or critical needs?	Priorities: 1. _____ 2. _____ 3. _____ 4. _____
2. For each priority, what kind of instructional emphasis is required (if any)?	Priority #1 _____ Priority #2 _____ Priority #3 _____ Priority #4 _____
3. For each priority, what kind of staff development is required (if any)?	Priority #1 _____ Priority #2 _____ Priority #3 _____ Priority #4 _____

BSNAP MODEL
7.0 PROGRAM PLANNING
(1 of 2)

SAMPLE # 8

WORKSHEET FOR PROGRAM PLANNING

1. What resources such as programs, projects, materials, staff development, etc. can affect Priority #1? Priority #2? Priority #3? Priority #4?	1. Priority #1 _____ Priority #2 _____ Priority #3 _____ Priority #4 _____
2. What resources can be shared or coordinated among the priority areas?	Shared Resources: _____
3. How much time is required to coordinate the resources? How much time is required to modify the programs? How much time is required to perform a staff development?	Task: / Time Required: Coordinate the resources _____ Modify the programs _____ Perform the staff development _____

SAMPLE # 8 (cont'd.)

WORKSHEET FOR PROGRAM PLANNING

4. Who will be responsible for each task to be accomplished?

Task: _____

Person Responsible for Implementation:

Task: _____

Person Responsible for Implementation:

Task: _____

Person Responsible for Implementation:

BSNAP MODEL
8.0 PROGRAM IMPLEMENTATION
(1 of 1)

SAMPLE # 9

WORKSHEET FOR PROGRAM IMPLEMENTATION

1. Are the resources provided which are necessary for program change?	____ Yes ____ No
2. Which instructional activities are being revised or added?	_____ _____ _____
3. Which staff development activities are being revised or added?	_____ _____ _____
4. What other identified changes in school program, staff, or environment are currently being implemented?	_____ _____ _____

BSNAP MODEL
9.0 META-ASSESSMENT
(1 of 1)

SAMPLE # 10

WORKSHEET FOR CONDUCTING THE META-ASSESSMENT

1. Describe the changes that have occurred as a result of the implementation phase.	Changes: Positive - Negative -
2. What indicators are you using as evidence of change?	Indicators
3. How do the observed changes relate to the needs assessment process?	

SECTION V

MODEL APPLICATIONS

This section contains specific examples drawn from action needs assessment and intended to help guide the individuals using the Section IV worksheets. In addition to examples relevant to needs assessment activities as a whole, this section includes special units on planning, data gathering, and data analysis for each of the four basic skills areas: mathematics, writing, reading, and oral communciation.

Case Study

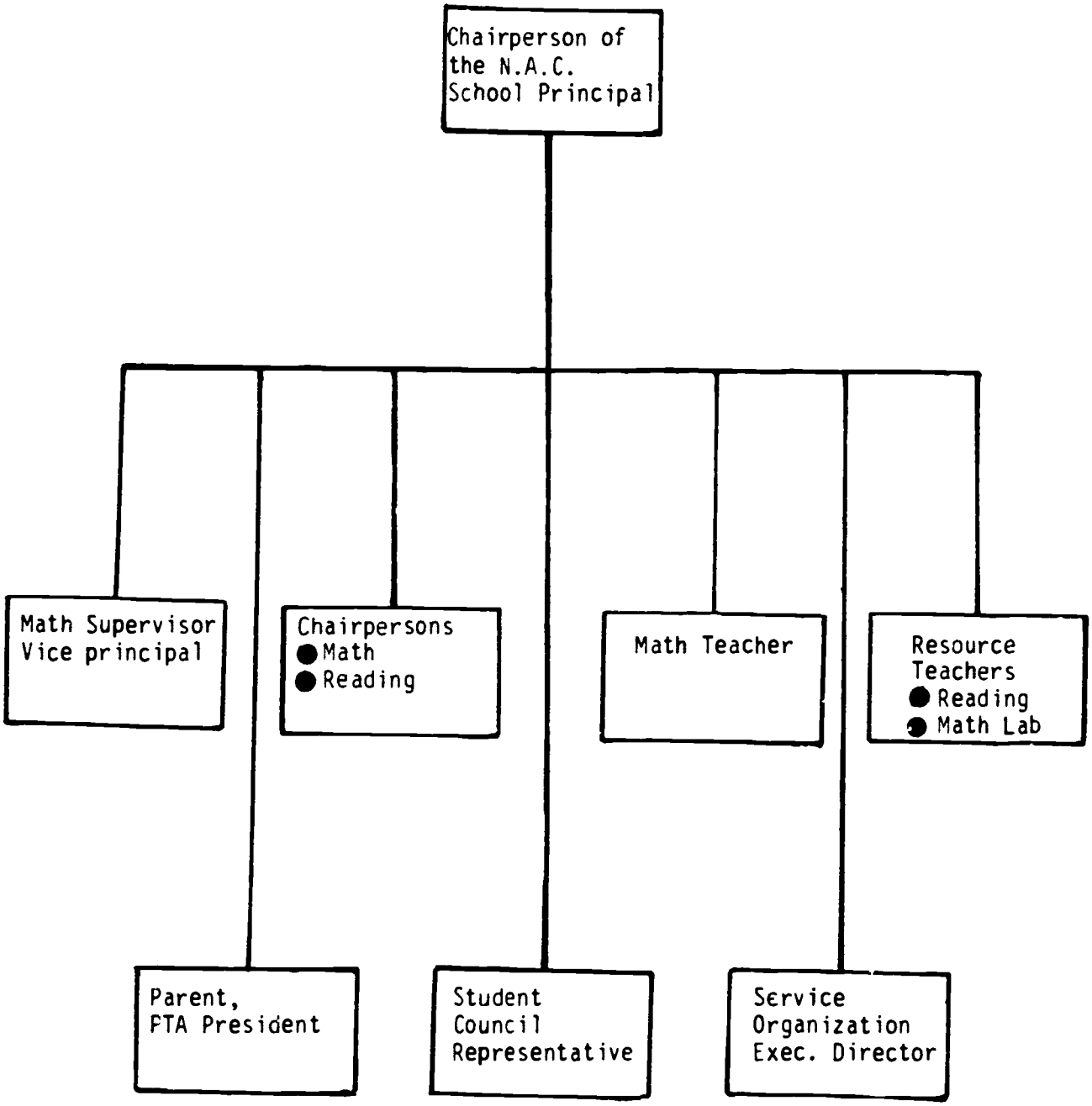
1.1 Set Up a Needs Assessment Committee (NAC)

The following tasks were accomplished before and during the establishment of the NAC:

- Met with the Board of Education members to develop a written policy stressing the importance of establishing a NAC;
- Obtained commitment from the Board of Education to provide human resources, financial resources, and time for the NAC;
- The school Principal took upon himself the responsibility to see that the appropriate personnel was selected for the NAC.

Every task that had to be carried out during the needs assessment was carefully analyzed by the NAC with respect to the level of effort, coordination requirements, scheduling, problems to be encountered, and the reports or recommendations to be developed. Inherent in the plan for this effort was the need to establish and maintain clear and concise lines of communication, coordination, and cooperation between the administration, project directors, State Education Agency

representatives, the community respresentatives, and the basic skills staff. This basic need, we feel, was addressed adequately by the NAC members selected. An organization Chart of the NAC is presented below:



Case Study

1.1 SET UP THE NEEDS ASSESSMENT COMMITTEE

This is a checklist for determining which task the people on the Needs Assessment Committee will be responsible for. This may be modified and tailored for your purposes as necessary.

TASK	Principal	Head of Department	Consultant	Teacher	Teacher	Teacher	Parent	Community Organization Rep.	External: State, Federal	Student	Other
1. Obtain the commitment of the school principal to lead the Needs Assessment Committee											
2. Inform the community about the Needs Assessment											
3. Explore all avenues for publicity											
4. Contact PTA representatives											
5. Contact the presidents of all school-related groups											
6. Contact community organizations											
7. Find out meeting schedules for community organizations, and when their newsletters go out											

Case Study

2.2 Establish Objectives for the Program

Below is a list of objectives set for various project components by a county in California.

	PROJECT COMPONENT / TYPE	OBJECTIVE
1.	STUDENT ACQUISITION OF / BASIC SKILLS / Process	1.0 The pupils at each participating school will demonstrate improved basic skill acquisition as evidenced by upward quartile shifts and higher median scores on the CAP or CTBS test(s) administered at the end of each project year.
2.	CURRICULUM STUDY AND INSTRUCTIONAL STRATEGIES / Process	2.0 Each participating school principal and staff will have conducted an assessment of instructional and curricular needs in the basic skills and prioritized the identified needs as evidenced by reports submitted to the project coordinator.
3.	CURRICULUM STUDY AND INSTRUCTIONAL STRATEGIES / Process	3.0 The project staff and each participating school principal will have identified resources to meet the identified basic skill needs according to the criteria specified by the advisory committee as evidenced by reports submitted to the project coordinator.

PROJECT COMPONENT / TYPE	OBJECTIVE
4. CURRICULUM STUDY AND INSTRUCTIONAL STRATEGIES / Process	4.0 The teaching staffs and principal of participating schools will meet at least bi-monthly for the purposes of reviewing and developing improvements in basic skills instruction at the site level, involving a variety of curriculum and grade levels as evidenced by meeting summary reports.
5. CURRICULUM STUDY AND INSTRUCTIONAL STRATEGIES / Process	5.0 Site staff will attend a minimum of four inservice training sessions related to identified curricular/ instructional needs at the school site level as evidenced by attendance records.
6. CURRICULUM STUDY AND INSTRUCTIONAL STRATEGIES / Process	6.0 Participants in inservice training sessions will demonstrate an ability to apply workshop skills in the classroom as evidenced by principal/ teacher observation/conference summary forms.

PROJECT COMPONENT / TYPE	OBJECTIVE
7. PRINCIPAL TRAINING / Process	7.0 Each participating school principal will: A. Receive training in observational techniques, and B. Demonstrate application of these techniques by participating in at least two classroom observation/conferences with each staff member implementing a project introduced curricular or instructional strategy as evidenced by principal/teacher conference summary forms.
8. INSTRUCTIONAL STRATEGIES / Process	8.0 At least 75% of the teachers participating in the project's staff development activities will have selected one or more instructional strategies for classroom use in the basic skill areas as evidenced by teacher lesson plans.

PROJECT COMPONENT / TYPE	OBJECTIVE
9. CHILD STUDY PROCESS / Product	9.0 At least 80% of the schools will conduct weekly "child study process" meetings as documented by minutes from the sessions.
10. CHILD STUDY PROCESS / Process	10.0 Seventy-five percent of teachers bringing student cases to the child study meeting will implement intervention strategies for "non-mastery" students in the regular classroom as indicated by school child study monitoring records.
11. PRINCIPAL TRAINING / Process	11.0 Each participating principal will conduct an average of at least one teacher conference relative to basic skills instructional planning for individual students or student groups per school week between January and June of 1981 as evidenced by conference summary reports.

PROJECT COMPONENT / TYPE	OBJECTIVES
12. PRINCIPAL TRAINING / Product	12.0 The project coordinator and advisory committee will develop systems to evaluate the quality of principal instructional leadership as evidenced by their inclusion in the second year application.
13. COORDINATION AND CENTRALIZATION OF RESOURCES / Product	13.0 Individual school sites will develop a system to coordinate various programmatic resources available to the classroom teacher as indicated by school site reports.
14. COORDINATION AND CENTRALIZATION OF RESOURCES / Product	14.0 The project coordinator and the advisory council will develop a centralized clearinghouse of resources as evidenced by observation.
15. COORDINATION AND CENTRALIZATION OF RESOURCES / Process	15.0 A support network will be formed and meet monthly regarding project activities as evidenced by records of meetings.

PROJECT COMPONENT / TYPE	OBJECTIVE
16. PRINCIPAL TRAINING / Product	16.0 Ninety percent of the participating principals will maintain a time log which indicates weekly hours spent related to instructional improvement as evidenced by the logs.

Case Study

2.2 Specify Objectives for the Program

LISTING OBJECTIVES

OBJECTIVE	ACTIVITY
1.0 The pupils at each participating school will demonstrate improved basic skill acquisition as evidenced by upward quartile shifts and higher median scores on the CAP or CTBS test(s) administered at the end of each project year.	1. Administer the Pretest 2. Identify the areas of need 3. Diagnose strengths and weaknesses 4. Prescribe remediation strategies 5. Implement the strategies 6. Monitor and evaluate progress 7. Post Test
2.0 Each participating school principal and staff will have conducted an assessment of instructional and curricular needs in the basic skills and prioritized the identified needs as evidenced by reports submitted to the project coordinator.	1. Staff survey administered 2. Community surveyed as to their perception of basic skill needs 3. Results reported and coordinated 4. Brainstorming meetings to identify goals, objectives, and activities (inservices, workshops, etc.) to meet those objectives 5. Showcase Conference (a variety of instructional and curricular methods will be presented for consideration for school site activities)

* "The Basic Skills Improvement in the Schools Program". Napa, California: Napa County Office of Education. Pam Robbins, Project Director. Project currently being conducted.

OBJECTIVE	ACTIVITY
3.0 The project staff and each participating school principal will have identified resources to meet the identified basic skill needs according to the criteria specified by the advisory committee as evidenced by reports to project coordinator.	1. Consultants identified to conduct training to meet site needs 2. Training sessions held
4.0 The teaching staffs and principal of participating schools will meet at least bi-monthly for the purposes of reviewing and developing improvements in basic skills instruction at the site level, involving a variety of curriculum and grade levels.	1. Planning meetings held 2. Regular meetings held to encourage ideas exchange, coordinate programs, and articulate across grade and subject areas.
5.0 Site staff will attend a minimum of four inservice training sessions related to identified curricular/instructional needs at the school site level as evidenced by attendance records.	1. Selected staff members attend training 2. Selected staff members share training experiences with staff
6.0 Participants in inservice training sessions will demonstrate an ability to apply workshop skills in the classroom as evidenced by principal/teacher observation/conference summary forms.	1. Staff members implement new skills in the classroom. 2. Staff members meet to share successes, problems, exchange ideas related to new skill implementation.

OBJECTIVE	ACTIVITY
7.0 Each participating school principal will: (1) receive training in observational techniques and (2) demonstrate application of these techniques by participating in at least two classroom observation/conferences with each staff member implementing a project introduced curricular or instructional strategy as evidenced by principal/teacher conference summary forms.	1. Needs identified 2. Principal training is conducted 3. Principal applies new skills in the evaluation/observation process.
8.0 At least 75% of the teachers participating in the project's staff development activities will have selected one or more instructional strategies for classroom use in the basic skill areas as evidenced by teacher lesson plans.	1. Teachers implement strategies. 2. Teachers model selected strategies at idea exchange meeting at another participating school.
9.0 At least 80% of the schools will conduct weekly "child study process" meetings as documented by minutes from the sessions	1. Child study meetings will be held.
10.0 Seventy-five percent of teachers bringing student cases to the child study meeting will implement intervention strategies for "non-mastery" students in the regular classroom as indicated by school child study monitoring records.	1. Teacher attends child study meeting. 2. Teacher implements suggested strategies 3. Teacher/Principal monitors student progress

OBJECTIVE	ACTIVITY
7.0 Each participating school principal will: (1) receive training in observational techniques and (2) demonstrate application of these techniques by participating in at least two classroom observation/conferences with each staff member implementing a project introduced curricular or instructional strategy as evidenced by principal/teacher conference summary forms.	1. Needs identified 2. Principal training is conducted 3. Principal applies new skills in the evaluation/observation process.
8.0 At least 75% of the teachers participating in the project's staff development activities will have selected one or more instructional strategies for classroom use in the basic skill areas as evidenced by teacher lesson plans.	1. Teachers implement strategies. 2. Teachers model selected strategies at idea exchange meeting at another participating school.
9.0 At least 80% of the schools will conduct weekly "child study process" meetings as documented by minutes from the sessions	1. Child study meetings will be held.
10.0 Seventy-five percent of teachers bringing student cases to the child study meeting will implement intervention strategies for "non-mastery" students in the regular classroom as indicated by school child study monitoring records.	1. Teacher attends child study meeting. 2. Teacher implements suggested strategies 3. Teacher/Principal monitors student progress

OBJECTIVE	ACTIVITY
11.0 Each participating principal will conduct an average of at least one teacher conference relative to basic skills instructional planning for individual students or student groups per school week between January and June of 1981 as evidenced by conference summary reports.	1. Principals conduct individual conferences relative to basic skills instructional planning.
12.0 The project coordinator and advisory committee will develop systems to evaluate the quality of principal instructional leadership as evidenced by their inclusion in the second year application.	1. Meetings will be held to identify priorities. 2. Evaluator will work with the coordinator and advisory committee to design system and forms. 3. Evaluator shares results.
13.0 Individual school sites will develop a system to coordinate various programmatic resources available to the classroom teacher as indicated by school site reports.	1. School staffs select representatives to form a committee to coordinate resources. 2. Committee collects, coordinates resources. 3. Committees from other participating schools share resources (Materials Faire, conference, etc.)
14.0 Project coordinator and the advisory council will develop a centralized clearinghouse of resources as evidenced by observation.	1. Clearinghouse developed and human and material resources collected.

2.4 Discuss the Kinds of Data Needs and Agree on Data to be Gathered

CATEGORIES OF VARIABLES TO BE CONSIDERED IN SELECTING OR DEVELOPING NEEDS ASSESSMENT INSTRUMENTS

The categories listed below are variables which were considered as potential data elements at a school in Missouri. They will frequently assist the practitioner in the selection and/or development of needs assessment instruments.

Category

I. People

A. Student Variables

1. Personal Characteristics
2. Attitudes
3. Goals and Priorities
4. Behavior
5. Knowledge
6. Social Content
7. Ethnic Background

B. Teacher

1. Personal Characteristics
2. Attitudes, toward students, school, programs

3. Goals and Priorities

4. Competence

5. Behavior

6. Commitment to Basic Skills

C. Administrators

1. Personal Characteristics

2. Attitude toward people, school, programs

3. Competence

D. Parents and Community

1. Personal Characteristics

2. Goals and Priorities

3. Attitude toward people, school, programs

4. Commitment to Basic Skills

II. Programs

Curriculum Programs, Lesson, Unit, and Module

1. Content and Sequence

2. Strategies and Methods

3. Resources

4. Communication

III. Organization

A. Governance

1. Policies

2. Composition

B. Administration

1. Personnel

2. Facilities

3. Students

4. Instruction

C. Management Climate

1. School Satisfaction

2. Interpersonal Relations

Case Study

2.7 Data Collection Plan

A successful data collection process can be enhanced by a well thought out plan that identifies all logistics in advance, provides a logical basis for personnel selection for carrying out the tasks, and specifically schedules timelines and guides for reviewing the progress of activities. The design below is an example of how one firm presented a plan for collecting data to assess career education programs.* The plan is general in nature so it may be used as a guide during any assessment process.

DATA COLLECTION PLAN

Step 1

Identify Data Collection Tasks

Step 2

Establish Target Dates

Step 3

Identify Skills Required

Step 4

Identify Personnel Available

Step 5

Match Tasks and Personnel

Step 6

Identify Training Needs

Step 7

Develop Training Plan

Step 8

Conduct Training

Step 9

Evaluate Data Collection Plan

*Handbook for the Evaluation of Career Education Programs (Draft). Bureau of Occupational and Adult Education, p. 14. USOE/DHEW Washington, D.C. Contract No. OEC-0-73-6663. August 1974.

2.8 Design Analysis of Existing Curriculum Strategies, Matherials, Presentation and Resources

A mathematics curriculum yardstick:

The National Council of supervisors of Mathematics (NCSM) position paper on basic mathematics skills (NCSM 1977) defines ten basic skill areas:

(1) Problem solving
(2) Applying mathematics to everyday situations
(3) Alertness to reasonableness of results
(4) Estimation and approximation
(5) Appropriate computational skills
(6) Geometry
(7) Measurement
(8) Reading, interpreting and constructing tables, charts and graphs
(9) Using mathematics to predict
(10) Computer literacy

Case Study

3.0 Summarize and Analyze the Needs Assessment Data

The following case study demonstrates how a basic skills mathematics improvement project in Texas summarized the results of their needs assessment and identified alternatives in instruction, teacher preparation, financial resources to operate an effective mathematics program. (See 5.0 Causal Analysis).

Summary of Identified Needs	Alternatives
1. Student Performance: Both local and statewide assessments of mathematics achievement indicate that students in Region Y are achieving below national, state and regional norms.	A review of research and related literature indicates that deficient students need special materials and adaptation of activities, techniques and skilled teachers in attaining successful academic achievement, particularly in mathematics performance.
2. Instructional Resources: Small regional school systems, and their private and parochial counterparts, seeking to improve their mathematics programs are faced with limited instructional leadership. In most of the small rural districts and the nonpublic schools served by the Center, supervisory personnel and other trained instructional leaders who might assist in facilitating and maintaining curriculum improvement are non-existent. Consequently teachers do not have available to them supervisory and consultative assistance that might possibly lead them to identify and remediate personal lack of particular skills for using mathematics strategies.	Each school district should be provided with adequate instructional leadership to plan, develop implement math improvement strategies at all grade levels. Technical assistance and consultative services should be available to all school districts, not just the larger ones who can afford them.

Summary of Identified Needs	Alternatives
3. Staff Development: Through interviews with teachers, administrators and examination of available records, it was discovered that few teachers in the elementary grades have have had pre-service or graduate level training in mathematics.	There exists an evident need to provide a process to identify and strengthen desirable teacher competencies required in improving the the teaching of mathematics. Training and retraining of teachers to help them respond to the use of advance technology should be made equal in importance to the development of initiatives aimed at school age children.
4. Instructional Continuity: A relatively large turnover in classroom teaching staff and administrators/supervisors is registered annually by small school districts and consequently leads to wide disparity of skills between the "old" and "new" staff.	Since the high turnover of faculty and staff must be accepted as a recurring problem, some provisions for providing continuity in the functioning of school programs and plans should be made. Inservice training for new teachers, particularly to enable them to adapt to past policies, should be provided annually. Additional training for teachers who have remained with the district should be available to strengthen their backgrounds and be differentiated from that provided for the new teachers.
5. Evaluation: Teachers and administrators in the regional schools have limited access to information regarding current, validated materials, practices, and programs to assist them in their instructional programs.	Materials should be developed to exploit the calculator and computer as a teaching tool at every point in the curriculum and to test a variety of ideas student performance.

3.1 Obtain, Organize and Analyze the Needs Assessment Data

Selecting areas of concern for the needs assessment will identify data types.

Area of Concern	Data Type
Teacher attitudes toward mathematics	Opinion
Student attitudes toward mathematics	Opinion
Parent attitudes toward mathematics	Opinion
Available community resources in mathematics	Descriptive
Usage of resources	Descriptive
Recent upgrading in mathematics curriculum	Achievement
Observed student behavior	Expert Opinion

Case Study

3.2 Collect Data on Learner Performance

This shows how a teacher can transform his/her routine assessment tools into needs assessment instruments. The form (Part A) is customarily used to determine grades for each student in a twelfth grade writing class. However, you can use the same list as part of your own needs assessment instrument. Copies of the blank form are circulated to the following people:

The student

Another student (selected randomly) in same grade

The student's parents

The assistant principal for curriculum

Two adult (nonschool) members of the community (selected randomly)

These people rank the student's performance level using a scale of 1 - 5 in the same manner as the teacher does in daily grading (see part A). Obtaining the participation of people other than the teacher in the assessment of students is one of the basic tenets of needs assessment. This is coordination of resources. Following completion of the ranking process, you should record the responses on a master sheet (part B). You will then have created your own needs assessment instrument.

PART A

After reading a paragraph the student has written on a favorite hobby, rate the student performance level on each item listed below using a scale of 1-5 (1 = Superior Performance and 5 = Unacceptable Performance). Place a check (✓) in the box that in your opinion, corresponds most accurately with the student's level of performance.

Basic Skill Writing Grade _____

Name of Rater _____ Title _____

Student Being Assessed* _____ Date _____

Levels of Performance

Items	Superior 1	High 2	Moderate 3	Low 4	Unacceptable 5
1. The ideas presented are creative or new					
2. The ideas presented are rational.					
3. The ideas presented are clearly understood.					
4. An idea is presented.					
5. The idea is well developed.					
6. The sentences are complete.					
7. Each paragraph is relevant to the main idea.					
8. Paragraphs are developed with concrete details.					
9. The order of details is logical.					
10. The punctuation is correct.					
11. The spelling is correct.					
12. Word usage is correct.					
13. Pronoun usage is correct.					
14. Verb usage is correct.					
15. Use of modifiers is correct.					
16. Nouns and verbs are in agreement.					

*Some administrators prefer to give each student a code name or code number and maintain a limited-access master list, thereby preserving confidentiality. The same may be done with some or all of the raters.

Case Study No. _____

3.2 Collect Data on Student Performance

The following assessment check list, adapted from the "Reading Program Assessment", shows how one state conducted an assessment of its "Right to Read" program. Included are narrative directions for conducting a mini-assessment of student performances and some questions to consider in determining causes of low performance.

Basically the steps in determining the level(s) of performance as follows:

1. Gather performance data (Standardized tests, informal measures, evaluation strategies, and other indicators) for each grade level of the school program.

2. Determine whether the scores, levels of performance or indicators met the expected level of performance for that grade level. The criteria for acceptable performance is usually established in the tests (norms) on materials but may be locally determined also (criterion-referenced).

3. Once the performance levels have been recorded and the results compiled, those areas found to be not up to the expected level of performance may be prioritized for attention.

4. When an area of performance (word recognition, for instance) has been identified as being low, and investigation should be made to determine the possible reasons for the low performance level. Among the questions that may be considered are as follows:

    a. Do the students really not know this skill?
    b. Is the testing instrument testing the area the way it is taught?
    c. Are the materials adequate?
    d. Is the skill being taught?
    e. Do teachers understand how to teach the skill?

READING PROGRAM ASSESSMENT

PROGRAM ELEMENTS GRADE_____

		Y	N
1.	Does student performance meet the requirement for grade level in the following areas?		
	A. Standardized Tests		
	1. Word Recognition		
	2. Vocabularly Development		
	3. Spelling		
	4. Reading Comprehension		
	5. Verbal Expression (Written/Oral)		
	6. Reading Readiness		
	7. Word Usage		
	8. Study Skills		
	9. Other		
	B. Informal Measures		
	1. Is an Informal Reading Inventory given?		
	2. Is an Attitude Toward Reading Survey given?		
	3. Is a Reading Interest Inventory given?		
	4. Any other Internal Measures given?		
	C. Indicate what evaluation strategies are used:		
	1. Diagnostic methods are used with most or all students to determine individual reading needs.		
	2. The teacher has formulated or selected specific objectives for each student and performance is measured in terms of these objectives.		
	3. Records of progress are kept for each individual students' performance.		
	4. Students are kept informed of their progress and are involved in self-evaluation (teacher-student conferences).		

D. Are any of the following student grouping patters used?

	Y	N
1. One-to-One		
2. Small groups (5 or less students)		
3. Large groups (6 or more students)		
4. Total Class		
5. Heterogeneous		
6. Homogeneous		
Is there need to study group patterns? Priority?		

E. Are any of these feasures of a planned and articulated reading program evident?

1. Is a single planned systematic program for teaching decoding skills used for most students in the school?		
2. ... comprehension skills used for most students in the school?		
3. ... study skills used for most students in the school?		
4. .... vocabulary skills used for most students in the school?		
5. Is there an alternative program provided for individual children who need it?		
6. Does the teacher use the text manual and supportive materials?		
7. Is a written record of skills mastered by each student (basal and recreational) passed to the next teacher?		
8. Is a written record of each student's reading level provided for content area teachers at junior and senior high?		
9. Is provision made in the school for careful reading placement of the entering student who comes with no records?		

Case Study

3.4 Collect Data on the Curriculum and Internal Factors

TEACHER PREPARATION

How well prepared and equipped are your teachers? What are the opinions on this critical topic of the administrators, students, parents, and teachers themselves. One California school district has devised a simple but successful checklist to determine the teachers' views. Use of a modified version of this data gathering tool is demonstrated below -- each teacher (either by name or anonymously) fills out one copy of the checklist solely in terms of his/her own experience. You can easily adapt the list to suit your own needs.

Teacher Preparation: Sample Checklist Filled Out/by Teacher
(Category of Respondent's Choosing: Release Time for Out-of-Town Workshops)

IMPORTANCE				EFFECTIVENESS			AVAILABILITY				
VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	VERY EFFECTIVE	SOMEWHAT EFFECTIVE	EFFECTIVE	NOT USED	GENERALLY AVAILABLE	SOMETIMES AVAILABLE	INFREQUENTLY AVAILABLE	NOT AVAILABLE	CATEGORY
		X			X				X			PRE-SERVICE
	X				X				X			DIRECTED OBSERVATIONS AND ACTIVITIES
X				X						X		LECTURES AND PROFESSIONAL MEETINGS
X				X						X		CONTINUOUS IN-SERVICE
		X			X				X			WORKSHOPS
		X			X				X			TEAM TEACHING
X				X						X		ADDITIONAL COURSE WORK
			X			X			X			ROLE PLAYING SESSIONS
		X			X				X			SELF-INSTRUCTION
		X		X				X				AUDIOVISUAL MATERIALS
			X			X			X			INSTRUCTIONAL MACHINES
		X			X				X			MULTIMEDIA KITS
	X				X					X		PROGRAMMED TEXTS
X				X				X				TEACHERS' GUIDES
X				X				X				TEXTBOOKS
			X		X				X			TRAINING KITS
X				X					X			WORKBOOKS
X					X				X			SUPPLEMENTARY PRINTED MATERIALS
X				X						X		ONE ADDITIONAL CATEGORY OF RESPONDENT'S CHOOSING

Case Study

3.6 Collect Data on Institutions and External Resources

Most teachers recognize the influence of parents on cognitive development of children.

If there are no records in your school about parental involvement in the basic skills areas, you may use the following survey to ascertain need in this area.

	YES	NO
1. Teachers in the basic skills recognize the need of positive parental intervention	___	___
2. Parents realize the importance of their participation in the learning process	___	___
3. Parents are made to feel welcome at school	___	___
4. Parents are often invited to participate in children's activities	___	___
5. Parents are given necessary guidance to assist their children with school activities in mastering basic skills	___	___
6. Parents are invited to use the library	___	___
7. The school sponsors Parents' Day at the library during which teachers in the basic skills alternate instructing parents on how to help other children	___	___
8. Teachers and Parents together analyze children's special needs	___	___

Case Study **READING**

4.2 Interpreting the Data

These data about staff development were the results of a survey conducted on effectiveness and importance of staff development activities (See Section III, Sample No. 4.2.) The data indicate that the areas considered most effective are not necessarily the areas considered most important and the reverse. Logically, consideration should be given to all data relating to the decision to conduct staff development. However, in setting priorities for implementation it would be wise to focus on those areas perceived as most important first. For example, 80 respondents considered Item #13, "text-books", very important, but only 5 viewed it as very effective; Item #13 could, then, be considered a #1 priority for staff development by one school. However, let's look at another item, #1, preservice, 80 of 90 respondents rated it within the range of importance; but 74 of 90 respondents rated it either somewhat effective, ineffective or not used. These perceptions indicate that this item could be the first priority for staff development depending upon the particular school or district resources and program focus.

SUMMARY OF PERCEPTIONS ABOUT STAFF DEVELOPMENT ACTIVITIES
NUMBER OF RESPONDENTS - 90

Number	PERCEPTIONS VI	I	SI	NI	ANALYSIS VI	I	SI	NI
* 1	30	16	34	10	13-80	12-65	17-80	6-53
2	40	4	41	5	3-60	10-60	14-77	16-30
3	60	0	22	8	11-60	15-52	7-75	1-10
4	50	35	5	0	4-50	4-35	8-68	5-10
5	15	3	62	10	9-50	9-25	5-62	9-10
6	15	1	31	53	2-40	16-25	18-62	3-8
7	13	2	75	0	15-38	8-20	2-41	2-5
8	2	20	68	0	16-35	1-16	1-34	10-5
9	50	25	5	10	1-30	11-15	6-31	13-5
10	25	60	0	5	10-25	18-15	3-22	18-5
11	60	15	5	0	5-15	13-5	12-15	14-2
12	0	65	5	0	6-15	2-4	4-5	4-0
*13	80	5	0	5	7-13	5-3	9-5	7-0
14	8	3	77	2	14-18	14-3	11-5	8-0
15	38	52	0	0	17-8	7-2	10-0	11-0
16	35	25	0	30	18-8	17-2	13-0	12-0
17	8	2	80	0	8-2	6-1	15-0	15-0
18	8	15	62	5	12-0	3-0	16-0	17-0

Number	VE	SE	NE	NU	VE	SE	NE	NU
1	16	30	10	34	12-65	13-80	6-53	17-80
2	4	40	5	41	10-60	3-60	16-30	14-77
3	0	60	8	22	15-52	11-60	1-10	7-75
4	35	50	0	5	4-35	4-50	5-10	8-68
5	3	15	10	62	9-25	9-50	9-10	5-62
6	1	15	53	31	16-25	2-40	3-8	18-62
7	2	13	0	75	8-20	15-38	2-5	2-41
8	20	2	0	68	1-16	16-35	10-5	1-34
9	25	50	10	5	11-15	1-30	13-5	6-31
10	60	25	5	0	18-15	10-25	18-5	3-22
11	15	60	0	5	13-5	5-15	14-2	12-15
12	65	0	0	5	2-4	6-15	4-0	4-5
13	5	80	5	0	5-3	7-13	7-0	9-5
14	3	8	2	77	14-3	14-8	8-0	11-5
15	52	38	0	0	7-2	17-18	11-0	10-0
16	25	35	30	0	17-2	18-8	12-0	13-0
17	2	8	0	80	6-1	8-2	15-0	15-0
18	15	8	5	62	3-0	12-0	17-0	16-0

MODEL APPLICATION

Case Study No.

5.0 Conduct Casual Analysis

The data analyzed in the needs assessment of one particular school district (K-12) indicated a decline in achievement of students in all basic skills areas from the primary grades through high school. The following items have been formulated as causes for this decline:

1. Teachers are not aware of basic skills curriculum scope or sequence which preceeds or follows the particular grade in which they teach. This lack of awareness causes the student to be exposed to needless repetition of instruction and poor articulation of curriculum content. This deficiency in teacher awareness of the K-12 curriculum framework and myopic view of basic skills area prevents the student from achievement in an organized, correlated, and systematic way. This teacher deficiency has contributed to the decline in achievement scores.

2. Teachers are not aware of the material and human resources available to them for improving the basic skills competency of the student. They say they do not use out-of-school resources except in oral communication curriculum. They have not identified or presented the available resources to the student to help the student achieve. In the primary grades where introductions to reading, mathematics, and oral and written communication are made, the teacher can be the primary instructional data source, but greater variety and expertise of resources must be provided the student as he/she advances through the grades.

3. Basic Functional Competency has not been a part of the educational process in recent times. Such things as being able to read warning labels, hear and identify emergency signals, or complete a tax or job application form have been incidental to "formal academic instruction" and it was "assumed" that the student could perform in these critical areas if the student attended school. Without the development of a formal scope and sequence of the curriculum to deal with these basic functional "real life" processes many students cannot demonstrate a functional competency level. The lack of this curriculum, and a staff trained to implement a systematic diagnostic and instructional cycle, has caused a void of student performance.

Case Study No. **MATHEMATICS**

6.C Select Priorities

One New York elementary community school district collected needs assessment data in reading and mathematics from various sources for grades 2 - 6 and then analyzed the data. The school district found that unusually large percentages of students fell into an unacceptable performance range (that is, performance below grade level). The needs assessment committee decided that the analysis of the student performance levels indicated a critical need area existed where students performed below their grade level. The committee decided that this critical area would be the first priority for the school district to address. The committee decided that other need areas would be ranked as second and third priorities, since their degree of criticality was not as high.

The schools, number of pupils tested and percent of students below the grade level for reading skills are presented below in Table A. Tables B and C list each grade, the number of pupils tested in that grade, and the percent of students performing below the acceptable range for that grade for reading skills for two individual elementary schools within the district. Table D lists the schools, the number of pupils tested, and the percent of students below the grade level for mathematics skills. Tables E and F list the number of pupils tested and the percent of pupils below minimum competency levels for grade 3 and grade 6 for two individual elementary schools.

Table A

Percentage of Elementary School Students Below Grade Level in Reading: 1979 Metropolitan Achievement Test

School	Number Pupils Tested	% Below Grade
A	282	65 %
B	594	35 %
C	270	70 %
D	510	49 %
E	308	56 %
F	313	73 %
G	371	71 %
H	513	70 %
I	37	92 %
J	296	76 %
K	365	79 %
L	291	32 %
M	264	89 %
N	263	68 %
O	86	62 %
P	154	58 %
Q	250	67 %
R	177	81 %
S	389	80 %

Table B

Percentage of Students by Grade at Public School G Below Grade Level in Reading: 1979 Metropolitan Achievement Test

Grade	Number Pupils Tested	% Below Grade
2	72	69 %
3	70	80 %
4	56	79 %
5	88	65 %
6	85	66 %
School Total	371	71 %

Table C

Percentage of Students by Grade at Public School H Below Grade Level in Reading: 1979 Metropolitan Achievement Test

Grade	Number Pupils Tested	% Below Grade
2	110	68 %
3	98	67 %
4	98	77 %
5	120	69 %
6	87	70 %
School Total	513	70 %

Table D

Percentage of Elementary School Students in Grades 3 and 6 Below Minimum Competency in Mathematics: 1979 Pupil Evaluation Program (State Education Department)

School	Grade 3 % Pupils Below Minimum Competency as Established by SED Total Raw Score 17 and below	Grade 6 % Pupils Below Minimum Competency as Established by SED Total Raw Score 22 and below
A	17 %	-
B	12 %	25 %
C	35 %	62 %
D	16 %	49 %
E	10 %	-
F	39 %	75 %
G	54 %	58 %
H	34 %	68 %
J	13 %	67 %
K	15 %	64 %
L	8 %	-
M	29 %	84 %
N	25 %	38 %
P	17 %	-
Q	-	46 %
R	38 %	53 %
S	32 %	60 %

* Names of individual schools have been changed in order not to reveal the identity.

COMMUNITY SCHOOL DISTRICT #3
300 West 96th Street
New York, New York 10025

Table E

Percentage of Students in Grades 3 and 6 Below Minimum Competency in Mathematics at Public School G 1979
Pupil Evaluation Program (State Education Department)

Grade 3		Grade 6	
Number Pupils Tested	% Pupils Below Minimum Competency as Established by SED Total Raw Score 17 and below	Number Pupils Tested	% Pupils Below Minimum Competency as Established by SED Total Raw Score 22 and below
69	54 %	84	58 %

Table F

Percentage of Students in Grades 3 and 6 Below Minimum Competency in Mathematics at Public School H 1979
Pupil Evaluation Program (State Education Department)

Grade 3		Grade 6	
Number Pupils Tested	% Pupils Below Minimum Competency as Established by SED Total Raw Score 17 and below	Number Pupils Tested	% Pupils Below Minimum Competency as Established by SED Total Raw Score 22 and below
102	34 %	102	68 %

Case Study

8.0 Program Implementation

At the program implementation stage of one basic skills needs assessment project, the roles of the resource persons were decided upon and are listed below.

Resource persons have been committed to provide:

Planning Assistance - Assistance to local staff by consultants in the preparation and presentation of program plans for administrative, community, and funding support.

Services - Workshops designed to improve the professional skills of administrators, teachers, and teacher aides involved in basic skills improvement program implementation, particularly with respect to program planning, project management, and evaluation.

Technical Assistance - Advice or assistance in dealing with particular problems relating to program implementation.

Evaluation - Assistance in tailoring the evaluation package to local programs, data analysis, and report services.

Awareness Sessions - Parents will be exposed to the program in awareness sessions.

Planning Seminars - Assistance will be given to discuss all staff of the six schools the necessary steps in the planning and implementation of the program.

Support Services - Distinguished consultants have committed themselves to three basic support services:

1. Staff Training - For teachers, administrators, and aides. At least four (4) days of training will be required to support and implement the program.

2. Consultant Services - Advice or assistance will be provided in helping school staff to deal with particular problems of program implementation or operations. Ten (10) days of consultation may be required.

3. Evaluation Services - Data analysis and reporting services of the third party evaluator.

8.2 Conduct Newly Revised Instructional Activities

The below listed approaches, to help students learn to write better, are suggestions which resulted from a panel meeting sponsored by the National Assessment of Educational Progress (NAEP).*

- Get the 9-year-olds "hooked" on writing by assigning writing suitable to their age and interests. Help them build security and interest through expressive writing and then lead them toward more difficult mode gradually. Let them experience success

- Build on the fact that all youngsters have a solid grasp of oral language. Use that base as a springboard for writing instruction.

- Have them write. No one can achieve success in a skill that is seldom practiced.

- Develop persuasive writing skills by developing a sense of audience. Have them practice writing for different audiences.

- Teach skills useful at each stage of the writing process: prewriting, composing and editing.

- Integrate writing into all activities - science, social studies, even mathematics. Writing is an important and very effective way of learning.

Case Study

9.0 Review of the BSNAP Process: Meta-Assessment

The case study that follows in an example of a checklist of criteria used by one state ESEA Title III Program for determining the quality of an educational needs assessment strategy:

CRITERIA FOR DETERMINING THE QUALITY OF AN EDUCATIONAL NEEDS ASSESSMENT STRATEGY

Planning, Management, and Resources

(✓) The personnel involved in the program are knowledgeable about evaluation, systems design, survey research, statistics and measurement theory, sampling and data processing techniques.

(✓) Sufficient funds have been allotted to adequately accomplish a comprehensive educational needs assessment.

(✓) There has been departmentwide involvement in the planning.

(✓) Lines of communication and responsibility are clearly established within the state educational agency and with representatives of private nonprofit elementary and secondary schools of the state.

(✓) The department, the chief state school officer, the Title III state advisory council, and the state board of education are committed to the needs assessment and its potential results.

Strategy

(✓) The overall concept of educational needs assessment defines an educational need as the difference between the current status of the learner and the desired learner outcomes.

(✓) The assessment strategy includes both long and short-range goals.

(✓) The instruments which are designed to collect data have been tested thoroughly on a pilot basis.

(✓) Procedures for analyzing data have been thoroughly tested to determine if all data collected can be appropriately utilized and treated.

(✓) The strategy includes specific activities which have been designed to achieve each objective included in the strategy.

(✓) The strategy includes a time frame for accomplishing each activity.

(✓) The strategy is sufficiently constructed so as to consider all the required elements.

(✓) Student learning goals are established for the purpose of determining children's needs through the educational needs assessment.

(✓) The student learning goals are behaviorally stated and representative of cognitive, affective, and psychomotor learning.

(✓) The student learning goals are sufficiently definitive to make them measurable objectives for student learning.

(✓) The strategy includes the elementary and secondary grade levels which will be assessed.

(✓) The strategy includes provisions for collecting data about student learning objectives into three categories:

Perceptions of the community (including business and industry) educators, and the learner, with regard to the relevance and importance of these objectives.

Criteria-based test instruments to determine the extent to which student learning objectives have been achieved.

Relevant demographic data about the learner.

(✓) The strategy includes provision for a data sample from which validity can be determined, i.e., we are measuring what we purport to measure.

(✓) The strategy includes provisions for a data sample from which reliability can be determined; i.e., we are measuring accurately and consistently.

(✓) The needs assessment strategy includes provisions for collecting appropriate information on specific subpopulations.

(✓) The strategy includes provisions to assure that the data collected are manageable and current.

(✓) The conclusions drawn from the interpretation of data can be supported.

(✓) There are logical and defensible procedures established for determining criticality of educational needs identified by data for the state as a whole and for each distinct area of the state.

(✓) A listing of critical educational learner needs which are representative of cognitive, affective, and psychomotor learning is given.

Hershkowitz, Martin, ed. Statewide Educational Needs Assessment: Results from Selected States. Silver Spring, Maryland; Consortium of State Education Agencies, 1974.

Figure 3

Case Study

Causal Analysis

In determining possible causes of problem areas, the following Case Study has been adapted from a school district in Florida.

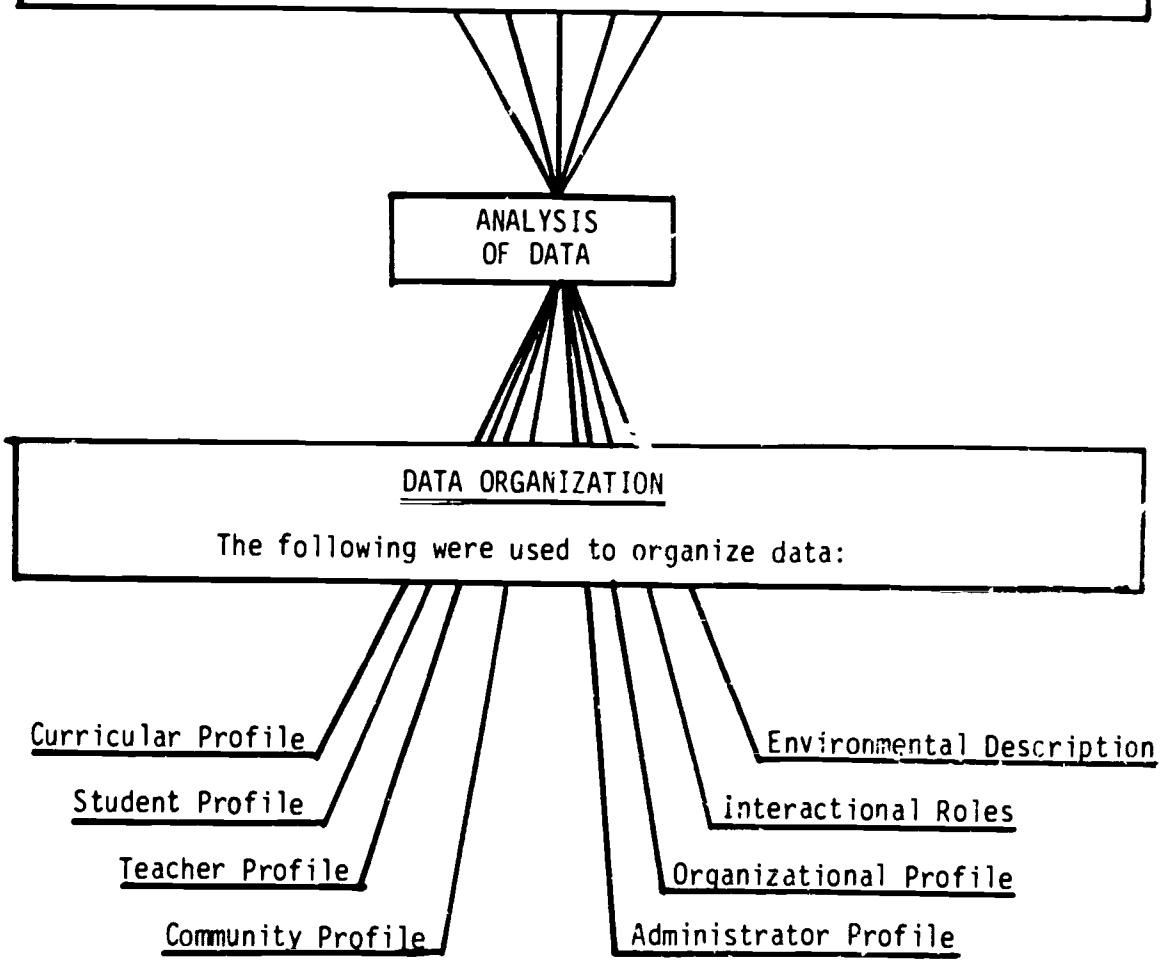
AREAS FOR DATA COLLECTION

Students	Teachers	Administrators	Community and Parents	School
Environment	Training	Interests	Expectations	Environment
Academic Profile	Interests	Administrative Styles	Concerns and Problems	Norms
Socio-Economic Characteristics	Concerns	Concerns and Problems	Involvement Potential	Goals
Social Interactions	Problems	Duties	Learning Interests	Organization Description and Analysis
	Norms	Social Emotional Characteristics		Curriculum
	Educational Characteristics	Community Relations		Problem Areas
	Social/Emotional Characteristics			Suspension & Dropout Characteristics
	Teaching Styles			

DATA EXAMINATION

Data to be examined includes:

- Surveys results
- Records of meetings
- Observations results
- Interviews
- Informal Communications Notes
- Discussions summaries
- Results of "Brainstorming" Sessions
- Student work samples
- Review test results
- Examine documents, files, handbooks, laws, regulations policy statements
- Student grades

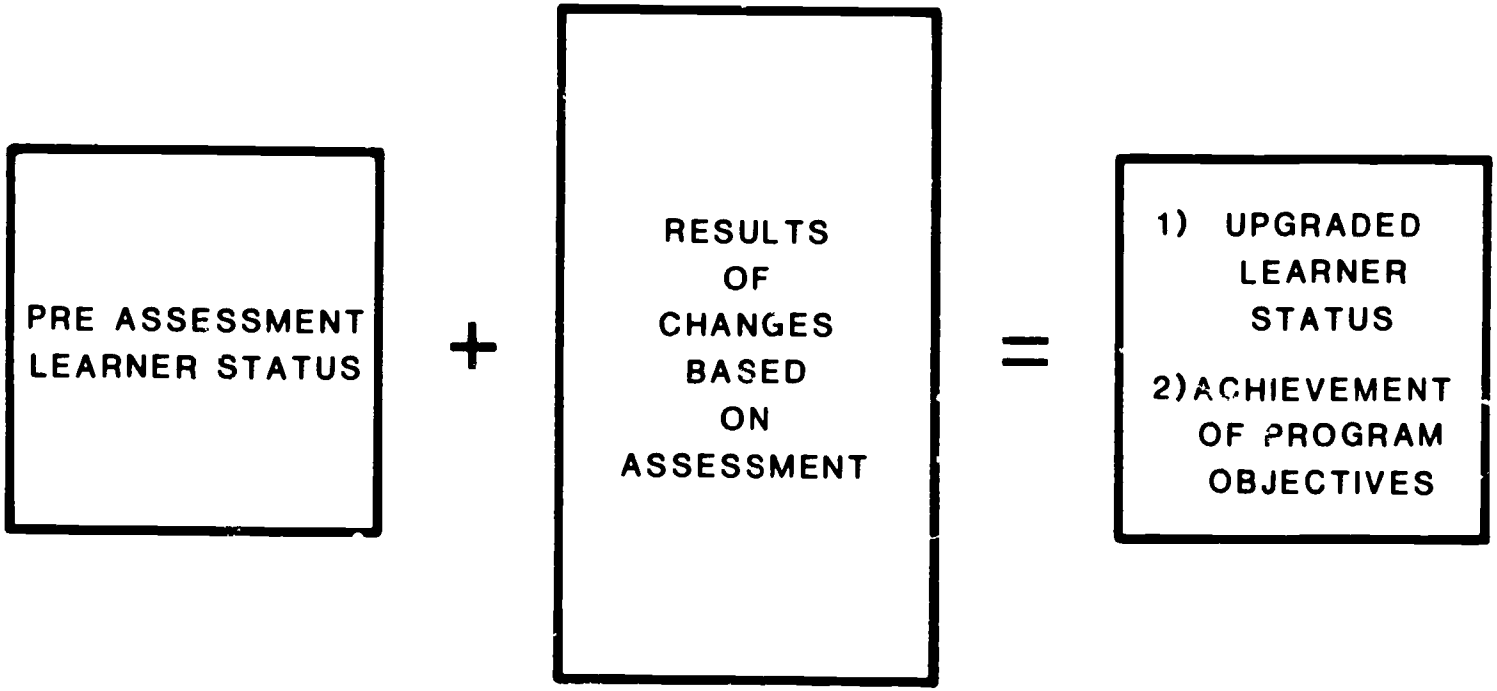


Concern Areas — Stated Needs — Problem Areas — Learning Needs

→ Determination of Concentration of Areas for Improvement ←

Figure 4

META-ASSESSMENT



If the needs assessment is successful, and if the subsequent strategy based on the assessment is successful, then the status of the learner at the end of the process will match the program objectives. If there is still a gap between the upgraded learner status and the program objectives then the needs assessment process should be reviewed, revised, and a new strategy can be devised and implemented

Case Study 9.0 Meta-Assessment

MANAGEMENT PLAN

This is an example of how one school district set a timeline for addressing their basic skills project objectives. This can be adopted for local use by their NAC.

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Organizational Development: Assessment of Student Needs	Each project school will analyze test scores and student retentions from the previous year and identify strengths and weaknesses in specific curriculum areas at particular grade levels as evidenced by staff development reports.	Process	Grade level meetings to study student scores and retentions School level meetings to share grade level test score information Development of a statement of school-wide student needs in basic skills as indicated by test scores and retentions											
Organizational Development: Assessment of School's Curricula & Instructional Needs in Basic Skills	Each participating school principal & staff will conduct an assessment of instructional & curricular needs in the basic skills and prioritize the needs as evidenced by reports submitted to the Project Director.	Process	Staff assessment of instruction and curricular needs utilizing a variety of sources: - interviews - questionnaires - needs statements from other programs (Title I, Bilingual, Special Education, Others) - parent surveys Prioritize needs											
Organizational Development: Curriculum & Instructional Strategies	Each participating school will develop a minimum of 2 school-wide goals based on the information gathered (cont'd.)	Product	Staff collaboratively develops two school-wide goals based on information about basic skill needs (cont'd.)											

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Basic Skill Improvements	develop improvements in basic skill instruction at the site level involving a variety of curriculum areas and grade levels as evidenced by meeting summaries.		Staffs meet as a total faculty (ongoing)											
Staff Development: Training of School Site Teams in Basic Skills Improvement Areas	Site staff will attend a minimum of four inservice training sessions related to identified curricular/ instructional needs at the site level as evidenced by attendance records. (These may be conducted to fine tune or augment previously learned skills/ techniques or address new topic areas in Basic Skills instruction.)	Process	Trainers are trained Trainers train staff Follow-up to insure implementation (ongoing)											
Staff Development: Insuring Impact of Training	80% of the site staff will demonstrate classroom use of instructional strategies presented in inservices during 1980-81 as evi- (cont'd.)	Process	Following training, staff uses new instructional strategies/skills with students Principal observes to support and pro- (cont'd.)											

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
	on basic skills improvement needs in the areas of curriculum & instruction.		Share goals with parents, district and county (so district & county can coordinate resources to support site level efforts)					→	→					
Organizational Development: Identification of Resources	The project taff nd each participating school principal will have identified resources to meet identified basic skill needs according to criteria established by the advisory committee.	Process	Principal works with team to review and identify resources to meet basic skill needs (ongoing activity)		→	→	→	→	→	→	→	→	→	→
Organizational Development: Curricula, Instructional Skills, Instructional Strategies, Development of a School Plan	Each school staff will collaboratively develop a school action plan which includes goals for basic skills improvement and specific strategies to coordinate resources to meet these goals.	Process and Product	Staff nominates a team Team develops the plan Team shares the plan				→	→	→					
Organizational Development: Review nd Monitor (cont'd.)	Project school staffs will meet at least monthly to review and (cont'd.)	Process	Staffs meet in grade level meetings or (cont'd.)					→	→	→	→	→	→	→

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
	denced by principal observation.		mote the use of these strategies (ongoing)											
Staff Development: Instructional Leader Role	Each participating project school principal will: - receive continued training in observational techniques and conferencing skills - demonstrate application of these techniques by participating in at least two classroom observation/conferences with each staff member implementing a project introduced curricular or instructional strategy as evidenced by principal/teacher conference summary forms.	Process	Seminars Skill specific training Consultation with consultant Principal teaches Principal observes classrooms Principal conducts conferences		→	→	→	→	→	→	→	→	→	→
Staff Development Organization Development (cont'd.)	90% of the participating principals will maintain a time log which indicates time spent (cont'd.)	Process and Product	Principals maintain time log of time spent in: clinical supervision, curriculum development, (cont'd.)		→	→	→	→	→	→	→	→	→	→

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Instruction Curriculum	related to instructional improvement as documented by the log.		teacher evaluation, staff development											
Organizational Development: Child Study Process	80% of all project schools will conduct weekly child study meetings as evidenced by reports from the sessions.	Process and Product	Weekly child study meetings											
Organizational Development: Child Study Process, Instruction, Curriculum	75% of teachers bringing student cases to the child study meetings will implement intervention strategies which reflect basic skills improvement training activities for "non-mastery" students in the regular classroom as indicated by monitoring records.	Behavioral	Teachers will implement intervention strategies Principal or designee will follow-up to ascertain if intervention/prescription was effective											
Staff Development: Administrative Training	Each participating principal will conduct an average of at least one teacher conference relative to basic skills instruc- (con't'd.)	Process	Conferences scheduled and conducted Follow-up to see if intervention suggestion was (cont'd.)											

ACTIVITY - TIMELINE CHART

Project Components	Objective	Type	Activity	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
	tional planning for individual students or student groups per school week as evidenced by conference reports.		appropriate											
Organizational Development: Curriculum Study	Each participating school will demonstrate that staff members apply skills acquired during training activities towards a goal of improved basic skills curriculum on site as evidenced by the development of school-wide curriculum plans indicating knowledge of task analysis in at least one basic skill area. (Attributes of the curriculum plans include articulation across grade levels consistent in format, notion of continuum)	Product	Teams selected to work on task Teams meet Curriculum plan developed							▶	▶	▶		
Organizational Development: Coordination of Resources	A support network comprised of county, district, school site and university staff will continue to meet to share & coordinate resources.	Process	Network Meetings Directory of resources compiled		———	———	———	———	———	———	———	▶	▶	

APENDICES

The Basic Skills Improvement Act, PL 95-561, Title II of the Elementary and Secondary Education Act (ESEA) of 1965, amended, encourages Local Education Agencies (LEAs) to do a better job of delivering instruction in the Basic Skills and encourages State Education Agencies (SEAs) to provide required support to LEAs.

The statement of purpose for the Basic Skills Improvement Program is found in Section 201 of the ESEA Title II:

"The purpose of this part is--

(1) to assist Federal, State, and local educational agencies to coordinate the utilization of all available resources for elementary and secondary education; to improve instruction so that all children are able to master the basic skills of reading, mathematics and effective communication, both written and oral;

(2) to encourage states to develop comprehensive and systematic plans for improving achievement in the basic skills.

Schools are instructed to identify and verify the kinds and extent of needs in each of the basic skill areas; show how to better use existing resources, particularly state and federal monies; and address the needs of all students, (i.e., average, low achieving, high achieving, etc.)

Sec. 205(1)

... assessment of school-wide needs to identify the instructional needs of children in basic skills.

The requirement includes the analysis of current curriculum and instruction practices, use of ESEA funds, how basic skills are addressed for programs for the gifted, and kinds of staff development required and provided.

DEFINITION OF TERMS

Appendix B

The following terms will be used in this Guide, as defined below:

Basic Skills	the four areas defined by the ESEA Title II legislation: reading, mathematics, and oral and written communication.
Causal Analysis	the process by which to determine the existence of basic skills needs.
Coordination	the process of identifying, organizing, and sharing resources in a conscious pattern of skill reinforcement within and among curricula to maximize the benefits for developing and improving learning in the basic skills.
Criteria	requirements by which judgments can be made about student achievement. For example: Some mathematics requirements for promotion to grade six are: (a) be able to count by multiples (b) be able to give value of each number in a 6-place number
Data	all information gathered during "the needs assessment" process on which decisions can be based.
Goal	broad statement of expectations for learner achievement and performance levels in the basic skills; are usually long term, but can also be short term.
Instruments	tools such as surveys, questionnaires, tests, rating scales, etc., used in the gathering of the data.
Meta-Assessment	An assessment of the assessment.
Model	a coherent set of procedures for conducting needs assessment, using appropriate data gathering instruments.
Need	the difference that exists between current and potential levels of performance, achievement, or resources.*

* We do not mean to imply that more resources are always better.

Needs Assessment — a systematic process which examines the performance and knowledge levels of learners in the basic skills as they relate to programs, systems, organizations, or environments in light of what is happening (present), what can happen (potential), and what is hoped for (needs) (future). The result of such examination will provide data for decisions about the follow-up steps.

Objectives — short term learner outcomes to be measured within the four (4) basic skills areas.

Performance — a demonstration of accomplishment or functioning in specified skill areas; one of the criteria by which excellence is judged.

For example: Students must be able to respond correctly to at least 80% of the questions on the 5th grade social studies examination for promotion to the next level.

Priorities — relative importance of competing needs. "Top" priority would be first to be addressed.

Random Sample — a representative group chosen from the total group where each member of the total group has an equal chance of being selected. Any information gathered from the random sample is unbiased and therefore accurately reflects the total group in those characteristics being studied.

Resources — programs, personnel, equipment, materials, facilities, instructional aids, etc., available for instructional purposes.

Standards — measurement criteria on which decisions are based when determining student performance levels; criteria for excellence; a way of measuring success standards which may be set by different groups, organizations, systems, etc., for various reasons.

For example:

(a) Standards for effective basic skills programs are presented in: "Standards: A Way of Measuring Success. What Do We Know About Standards for Effective Basic Skills Programs?" (See Appendix C)

(b) Some State Boards of Education set standards for teacher certification: "Teachers must have completed 150 credit hours of college preparation, with no less than 100 credit hours in major field."

STANDARDS FOR BASIC SKILLS WRITING PROGRAMS*

An effective basic skills program in writing has the following characteristics:

TEACHING AND LEARNING

1. There is evidence that knowledge of current theory and research in writing has been sought and applied in developing the writing program.

2. Writing instruction is a substantial and clearly identified part of an integrated English language arts curriculum.

3. Writing is called for in other subject matters across the curriculum.

4. The subject matter of writing has its richest source in the students' personal, social, and academic interests and experiences.

5. Students write in many forms (e.g., essays, notes, summaries, poems, letters, stories, reports, scripts, journals).

6. Students write for a variety of audiences (e.g., self, classmates, the community, the teacher) to learn that approaches vary as audiences vary.

7. Students write for a wide range of purposes (e.g., to inform, to persuade, to express the self, to explore, to clarify thinking).

8. Class time is devoted to all aspects of the writing process: generating ideas, drafting, revising, and editing.

9. All students receive instruction in both (a) developing and expressing ideas and (b) using the conventions of edited American English.

10. Control of the conventions of edited American English (supporting skills such as spelling, handwriting, punctuation, and grammatical usage) is developed primarily during the writing process and secondarily through related exercises.

11. Students receive constructive responses—from the teacher and from others—at various stages in the writing process.

12. Evaluation of individual writing growth:
    (a) is based on complete pieces of writing;
    (b) reflects informed judgments, first, about clarity and content and then about conventions of spelling, mechanics, and usage;
    (c) includes regular responses to individual pieces of student writing as well as periodic assessment measuring growth over a period of time.

SUPPORT

13. Teachers with major responsibility for writing instruction receive continuing education reflecting current knowledge about the teaching of writing.

14. Teachers of other subjects receive information and training in ways to make use of and respond to writing in their classes.

15. Parent and community groups are informed about the writing program and about ways in which they can support it.

16. School and class schedules provide sufficient time to assure that the writing process is thoroughly pursued.

17. Teachers and students have access to and make regular use of a wide range of resources (e.g., library services, media, teaching materials, duplicating facilities, supplies) for support of the writing program.

PROGRAM EVALUATION

18. Evaluation of the writing program focuses on pre- and post-program sampling of complete pieces of writing, utilizing a recognized procedure (e.g., holistic rating, the Diederich scale, primary trait scoring) to arrive at reliable judgments about the quality of the program.

19. Evaluation of the program might also include assessment of a sample of student attitudes; gathering of pertinent quantitative data (e.g., frequency of student writing, time devoted to writing activities); and observational data (evidence of prewriting activities, class anthologies, writing folders, and student writing displays).

*Developed by the National Council of Teachers of English.

SOURCES FOR CASE STUDIES

Appendix D

The case studies presented in Section V, Model Implementation, are examples extracted from basic skills projects in several school districts throughout the country, including the following:

- Bronx Community School District #11, New York
- Brooklyn Community School District #18, New York
- Community School District #3, New York
- Compton Unified School District California
- Emery Unified School District, California
- Irvine Unified School District, California
- Kanawha County, West Virginia
- Napa County Office of Education, California
- Region XIX Education Service Center, El Paso, Texas
- Wake County Public Schools, North Carolina
- Weber Community School District, Ogden, Utah

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