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ABSTRACT

The paper considers the concept of needs assessment in terms of the activities of TADS (Technical Assistance Development System), a project to provide support services to model demonstration projects and state education agency grantees of the Handicapped Children's Early Education Program. Section 1 defines needs assessment, describes approaches to needs assessment (democratic approach and discrepancy approach), and lists guiding principles of the TADS needs assessment process (such as confidentiality of information). Section 2 traces the evolution of the TADS needs assessment process from 1971 to 1981. Included within the section are sample interview formats, project development checklists, worksheets, and pages from the "TADS Needs Assessment Procedures Manual." Current needs assessment procedures are described in a third section in terms of on-site and self-administered needs assessments, scheduling, matching the needs assessor to the project, preparing for the needs assessment, implementing the needs assessment, and developing the memorandum of agreement. Evaluation of the needs assessment procedures is the topic of the fourth section. Sample questionnaires are offered, and findings from two case studies and assessment strategies are mentioned. Among conclusions is that TADS provides structure by thoroughly training needs assessors in the process of assessment and familiarizing them with the clients' mission and scope, by suggesting preparatory activities for the client, and by developing materials with which to review programs. (SW)

TECHNICAL ASSISTANCE

an Occasional Paper Series from TADS on topical issues involving technical assistance to educational programs

The Development of a Needs Assessment Process

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Determining the assistance that a client organization requires to be productive is a critical part ▓▓▓ technical assistance agency's work. The right services and resources can be provided only if the agency has knowledge of the client's needs. This knowledge can be garnered through a process called, by TADS, "needs assessment."

In this paper, we have considered the concept of needs assessment in terms of what we have learned at TADS over the last decade. We have organized the ensuing discussion around five major topics:

1. Needs Assessment, An Introduction

2. Evolution of the Needs Assessment Process (at TADS)

3. Current Needs Assessment Procedures

4. Evaluation of the Procedures

5. Conclusions

The information we have included here is primarily for those who operate technical assistance (TA) programs and for organizations and people who receive such services regularly. We hope that comparing your experiences with our's will lead you to new insights about this process and will perhaps give you some ideas for improving your needs assessment work.

NEEDS ASSESSMENT, AN INTRODUCTION

Definition. Needs Assessment is "jargon." Its meaning has become obscure through overuse and misuse. In education and other human-service fields, it can mean many things: a systematic information-gathering process to help plan; program evaluation (a nice way of saying, "We're not coming to evaluate your program, we're just conducting a needs assessment"); or resource identification (what services are currently being provided and by whom?)

We use needs assessment to describe efforts to discover what an organization, program, or individual needs (or needs most). In a technical assistance agency, this sort of assessment is conducted so that help, related to the needs identified, can be provided. A technical assistance needs assessment, in fact, always includes a promise to help.

Conceptual history. In Needs Assessment for Inservice Education: Building Local Programs (1980), George P. Kuh traces the development of ideas concerning the role of needs assessment over the last twenty-five years. Prior to the 1960s, it was common practice to design an educational or training program without giving "systematic consideration to the unique needs or learning requirements of the students" (p. 6). Programs were formed on sound educational theory and the experiences of the instructors and administrators. During the 60s, efforts to identify students' needs before planning curriculum objectives and components began to be made. These efforts evolved into two general methods of assessing needs: the democratic approach and the discrepancy approach.

The democratic approach is basically a group process. Experts and/or representatives of various constituencies related to the proposed effort

are assembled to determine what needs exist. A need, therefore, is defined as "a change desired by the majority of some reference group" (p. 6). The strength of this approach is that those who will be affected are involved in determing the needs. Its major weakness is that the group may not make a just distinction between needs and wants. In other words, needs may "merely reflect changes that are preferred or demanded for various reasons" (p. 6).

In the discrepancy approach, a need is the difference between the present level of functioning and an ideal or acceptable level (i.e., need = "desired" minus "present" level of functioning). The strengths of this approach are its simple formula for defining need and the "apparent congruence between this method and the goal/objective/outcome mentality that has characterized education during much of the past decade" (p. 6).

The discrepancy approach also has some weaknesses. First, it tends to define needs in a negative way, suggesting that something is incomplete, inadequate, or missing. Second, it assumes that one can accurately define the ideal or the acceptable when, in fact, that may not be true. Third, it lacks a clear method of determining the level of necessity (i.e., how necessary is it that the discrepancy be reduced).

The TADS needs assessment -- which has some elements of both approaches -- requires extensive involvement from those affected by the needs assessment. This is because we assess needs by comparing the client's present status with desired status -- which is possible only with their participation.

Levels of Needs. All program needs are not necessarily technical assistance needs. The technical assistance agency and the client must have a mutual understanding of the kinds of needs appropriate for technical assistance.

5

Without a common understanding, it will be very difficult to develop agreements
and form realistic expectations for the assistance. Black (1980) clarifies
the appropriate focus for a technical assistance needs assessment by describing
three levels at which needs can be identified:

> Need may refer to broad programmatic concerns that
> are permanent and on-going. For example, as long as
> there are handicapped children there will be a need
> for special education. Need is also used to describe
> the difference between an organization's current status
> and its desired status. In this context needs are
> equivalent to an organization's goals and objectives,
> e.g., the need to increase the number of handicapped
> children receiving special education services from
> the organization. Finally, need can refer to specific
> tasks or activities an organization must undertake in
> order to accomplish its goals and objectives. For
> example, the organization may have a need to plan,
> implement, and evaluate a "child find" system in their
> community. When the organization cannot accomplish a
> task or activity using its own local resources, and/or
> could benefit from "outside" support, an organization's
> need becomes a technical assistance need (p. 38).

For a client program, the first order of business in pinpointing
technical assistance needs is clarifying goals, objectives, and program
plans. These must be clear before the assessment.

The TADS TA Cycle. Our system of assisting clients begins with program
planning. It is the first step in a cycle of activities that we use each year
with all clients -- federally funded model demonstration projects of the
nationwide Handicapped Children's Early Education Program (HCEEP). See
Figure 1.

A review of the client's program plans (Step 1) ensures that both we
and the client share an understanding of the client's mission. If a client
needs assistance in program planning, TADS provides help prior to conducting
the complete TA needs assessment. The TA needs assessment is then carried out
(Step 2) to identify (1) specific needs and (2) plans for meeting those needs.

6

FIGURE 1
TADS Technical Assistance Model

```
                    1
                 PROGRAM
                 PLANNING

        5                          2
     EVALUATION                  NEEDS
     OF                          ASSESSMENT
     ASSISTANCE


          4                   3
       TECHNICAL          TECHNICAL
       ASSISTANCE         ASSISTANCE
       DELIVERY           AGREEMENT
```
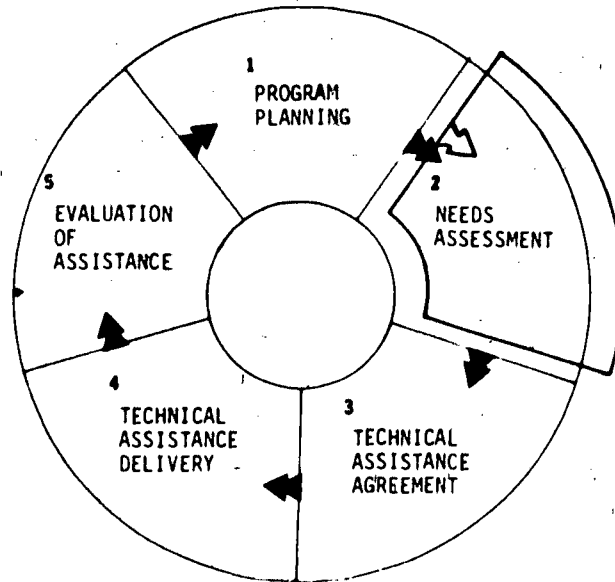
Next, a "Memorandum of Agreement" (Step 3) specifying both needs and

services to be provided is negotiated in discussions between the client and

TADS. It includes specific expectations, responsibilities, and timelines for

us and for the client. The services specified in the agreement are then

delivered (Step 4). Evaluation of the services (Step 5) clarifies the

results of the TA effort and helps us determine whether or not the TA cycle

should be renewed.

Guiding Principles for TADS Needs Assessment Process. From the beginning,

certain principles have guided our work with clients. They have been strong,

ongoing influences during the evolution of our needs assessment process and

have shaped several aspects of its design.

1. A positive working relationship. This is fundamental. It must
   exist between client and TA provider for technical assistance to
   be most effective. Black (1980) points out that several aspects
   of the long-term client-TA provider relationship are shaped during

the needs assessment. Respective roles and expectations are clarified, attitudes are formed, competence and credibility are established, as well as feelings of mutual trust or mistrust.

2. A nonjudgmental posture. The client must believe that the TA provider's function is to help, not judge. Otherwise, caution -- even defensiveness -- may govern interactions and disrupt a positive working relationship. This is especially true during the needs assessment process, since it requires a close examination of all project aspects.

3. Confidentiality of information. If clients believe information about their projects may be given others, especially those who have authority over the projects, they will be more reluctant to share concerns openly and honestly. Needs assessment is obviously a critical time for information sharing.

4. Control of decision making. This must stay with clients. They must make the final decisions regarding TA needs and priorities if they are to be truly receptive and responsive to services. The assessment process, while providing structure and advice to the client from an outside perspective, must give the final word to the client.

5. Enrichment/deficit perspective. The client need not have a problem to receive help. Technical assistance can address areas of strength as well as areas of weakness.

6. Preventive as well as remedial. TA services should be provided to prevent, as well as solve, existing problems. The most effective services are often preventive.

In TADS system, needs assessment has proven to be the pivotal operation. Most initial interactions between TADS and its clients each year are geared toward this event, and virtually all subsequent actions are shaped by it. Consequently, TADS has constantly worked to refine its assessment procedures. The result has been a highly successful approach to TA needs assessment.

EVOLUTION OF THE NEEDS ASSESSMENT PROCESS

The Bureau of Education for the Handicapped (now, the Office of Special Education) established TADS on July 1, 1971. Since then, TADS has served between forty and one-hundred client programs per year. From the beginning, TADS was asked "to perform an assessment of the needs of each Handicapped Children's Early Education Program model demonstration project." Each project

in this Program is given three years of funding to develop and demonstrate their proposed model for serving young handicapped children. Funds can be spent in the following areas:

1. Services to children
2. Services to parents
3. Staff development
4. Evaluation of program
5. Dissemination of project materials and methods
6. Administration and management of program

At any given time, TADS is working with projects in the first, second, and third years of funding since new projects are funded annually. Consequently, the needs assessments conducted by TADS must take into account the different needs of projects in different years of funding as well as their needs in these six areas.

As you will read, TADS has used (over the years) four basic methods of assessing needs:

1. On-site assessments are conducted by an outside "needs assessor" at the place of the client's operation.

2. Off-site assessments are also conducted by an outside assessor, but they do not occur at the client's place of business.

3. Self-assessments are conducted by the client with the aid of written materials provided by the technical assistance organization.

4. Telephone assessments are handled by the technical assistance agency's staff members. These people call the client and identify the needs via "long distance."

The way the TADS process of assessing needs has evolved over the years is described in this section. For each year of our history (except 1971-72), we have explained the way the needs assessment was conducted, any change from the previous year, and the reason for the change.

1971-72

An on-site visit to each of the clients was conducted during the months of October and November, 1971. TADS invited its Advisory Board, a newly organized panel of fifteen distinguished professionals, to assume the task

of making the visits. The advisors needed to know the objectives and agenda of the visits. A meeting was held in Chapel Hill to familiarize them with our objectives and to gather their suggestions for conducting assessments.

As a result of that meeting, an interview kit -- to help the assessors collect information in a standard way -- was designed. It included information about the specific client to be visited, an outline of the needs assessment interview format (Figure 2), a rating form (with instructions) to determine project strengths and weaknesses in four major content areas -- Intervention, Communication, Parent Programs, and Staff Training -- and a form for listing the priority of needs. It also specified the information TADS needed from the interview. Advisors were asked to write their comments about the projects and to collect samples of materials projects had prepared, such as: newsletters, reports, brochures, lists, and samples of evaluation instruments. These samples were placed in the TADS library as resources for later use.

Asking advisors to visit over forty projects proved a major undertaking. The projects were divided among six geographic regions; each region had five to nine projects. One TADS staff

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FIGURE 2 (1971-72)
Outline--Needs Assessment Interview Format
(You may want to use this outline during the interview)

I. Explanation of Purpose

II. Introductory Open-Ended Questions
    A. Description of project
    B. Project strengths
    C. Project problems

III. Content Areas Information   Goals | Objectives | Targets Actions | Evaluation
    A. Intervention
        1. Language
        2. Motor
        3. Conceptual
        4. Perception
        5. Social
        6. Emotional
        7. Physical health
        8. Assessment
    B. Communication
        1. Liaison
        2. Demonstration
        3. Dissemination
        4. Multiplier activities
    C. Parents
        1. Information exchange
        2. Parental involvement
        3. Training
        4. Emotional support
    D. Staff training
    E. Others

IV. Establish a listing of priority needs
    (These can be written in discussion with director. or by yourself alone, as you wish.)

V. Get materials from director
    A. Material he'd like to give us
    B. Evaluation materials

VI. After the interview. prepare. if not done. and send back to TADS
    A. Listing of priority needs
    B. The rating form
    C. If you wish, notes on content areas
    D. Materials from the center they wish to give us
    E. Instrument listing and/or samples from center
    F. Any further notes, comments, etc. you care to make
    G. Your expense sheet

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+-----------------------------------------------------------+
|                   FIGURE 3 (1972-72)                      |
|           Suggested Format for Needs Assessment Visit     |
|                                                           |
|                                                           |
|   First Morning:                                          |
|                                                           |
|        1.  Become acquainted with project - i.e., visit classes,  |
|            talk generally with staff, build personal relationship. |
|                                                           |
|        2.  Proceed through needs assessment process.      |
|                                                           |
|                                                           |
|   First Afternoon:                                        |
|                                                           |
|        3.  Write Program Plan Outline with project director  |
|            (Program Plan Outline forms enclosed).         |
|                                                           |
|        4.  List priority of general needs (at least four).  |
|                                                           |
|                                                           |
|   Second Morning:                                         |
|                                                           |
|   ---> 5.  Write Technical Assistance Agreement (forms enclosed).  |
|                                                           |
|                                                           |
|   Outcomes (products to send to TADS):                    |
|                                                           |
|        a.  Revised Program Plan Outline (send to TADS for retyping)  |
|                                                           |
|        b.  Priority list of four general needs            |
|                                                           |
|        c.  Written Technical Assistance Agreement (completed forms  |
|            sent to TADS for ratification and retyping)    |
+-----------------------------------------------------------+
```

member served as a coordinator for each region, handling the
schedules and collecting results from the advisors.

Early in December, 1971, the Advisory Board met with the TADS
staff at Quail Roost, a retreat facility near Chapel Hill.
The advisors recounted their experiences and impressions of
the model projects and presented the data they had collected.
On the basis of this meeting, a strategy for delivering
technical assistance for the remainder of the year was
developed.

Essentially, projects were grouped together according to
their needs and geographic location. Each cluster of projects
was convened for a meeting to address their common needs
(e.g., communication, parent program development) and to
develop individual, written agreements with each project
specifying the technical assistance to be provided by TADS.

1972-73

At a conference for first-year projects in Winter Park, Colorado,
the needs assessment format was modified for 1972-73, both
in terms of content and procedures followed. The needs
assessment visits and the writing of technical assistance
agreements were to be completed within a shorter time span.
Thus, the agreement writing was conducted by the assessor
as the last task of the on-site needs assessment or at the
conclusion of a needs assessment group meeting (see Figure 3,
point 5). This tentative agreement was later reviewed by
the TADS staff, modified if needed, and adopted.

The advisors performed most of the on-site needs assessments.
However, because the number of projects had increased, TADS
staff members conducted more on-site assessments and wrote
more agreements than during the first year.

TABLE 1
Needs Assessments in TADS
First Two Years

Type of Assessment	Years	
	1971-72	1972-73
On-Site	44	29
Off-Site	0	37
Total	44	66

Table 1 shows that the setting of some needs assessment activities
changed. Initially, TADS had used the needs assessment visits to
establish rapport with the project personnel and to become
familiar with programs, facilities, and resources. This
on-site visit was less important for projects TADS knew.

Four needs-assessment group meetings were held in September
of 1972 for second- and third-year projects which were clustered
by geographic location and funding year. The principal purposes
of the meetings were to identify technical assistance needs
and to develop tentative technical assistance agreements.

1973-74

During the fiscal year 1973-74, the plan of conducting on-site
needs assessments with all first-year projects and off-site
needs assessments with second- and third-year projects through
a series of group meetings continued. The needs assessment
materials, however, became more defined.

TADS developed several booklets to help the needs assessors:
clarify project goals and objectives, obtain a basic overview
of each project, describe the types of technical assistance
TADS could provide, and write technical assistance agreements.
This procedure was designed to cut down on needs-assessor bias.
In the previous two years, TADS had observed that needs assessors
tended to identify needs related to their own areas of expertise --
thus raising the question of whether all program areas were
being equally and adequately explored.

Forty-four new demonstration projects were funded in 1974, raising the total number of TADS clients to about one hundred. This many projects required a change in the needs assessment process. At an orientation meeting for new projects in Ashville, NC (July 30 - August 2, 1974), three alternative technical assistance plans were presented. A newly developed instrument, the TADS Organizational Profile (TOP), was used to help determine which alternative was most appropriate for each new project.

The TOP provided a structured profile of the organizational and programmatic development of each project. It covered three areas: the children's program, the parent program, and the program for influencing decision makers. These areas are the major foci of HCEEP projects. Development in each area was assessed at basic (concepts and knowledge), intermediate (program planning, implementation, and evaluation) and advanced (demonstration and dissemination) levels.

Based on the TOP results, projects were matched to one of the following plans:

Alternative 1: Technical Assistance Agreements were negotiated at the orientation meeting. Only those projects which were highly developed and could easily identify their technical assistance needs were given this Alternative.

Alternative 2: This group of projects demonstrated a sufficiently high level of program conceptualization for technical assistance needs to be identified through an on-site needs assessment at a later time.

Alternative 3: Projects needing assistance in planning before a needs assessment could occur were given Alternative 3. These projects attended small-group meetings where assistance was given in developing goals and objectives. The outcome of the meetings was program-plan outlines which became the bases of on-site needs assessments later in the year.

TADS also decided to conduct on-site needs assessments with second-year projects. Figure 4, the instructions for assessment, lists the expected outcomes for the needs assessment with second-year projects as well as the content of TADS needs assessment kits for 1974-75. TADS staff as well as TADS advisors conducted the needs assessments.

```
FIGURE 4 (1974-75)
Instructions For The Needs Assessment
(Second year projects' on site needs assessment)


        The enclosed materials have been prepared to assist in the assessment of
   technical assistance needs for HCEEP projects who are approximately mid-way
   in their three-year funding cycle.  The expected outcomes of this needs
   assessment are as follows:

          1.   To visit the project site; meet the staff and observe
               the program (if desired by the project director).

          2.   To review the technical assistance services provided
               to the project over the last six months and report
               results.

          3.   To review the project's renewal proposal and plans
               for the third year.

          4.   To identify the project's technical assistance needs
               (using the TOP).

          5.   To develop a tentative Technical Assistance Agreement.

          6.   To identify any strong components in the project that
               might be a resource for TADS in the future.

      The contents of this needs assessment kit should include:

          1.   An information sheet on the project.

          2.   A description of the technical assistance the project
               has received during the last six months.

          3.   Two copies of the TOP.

          4.   A copy of Guidelines for Writing Technical Assistance
               Agreements.

          5.   Blank Technical Assistance Agreement forms.

          6.   Forms for writing the report on the needs assessment.

          7.   Travel reimbursement forms.
```

1975-76

Two major changes in the needs assessment process occurred in 1975-76.
First, TADS abandoned its request that all new projects prepare a
Program Plan Outline as a needs assessment prerequisite. Getting
a completed program outline from the project and sending it to the
needs assessor prior to his or her visit took a disproportionate
amount of time; and, in many instances, the outlines were never
received or were incomplete.

In place of the plan, projects were given five workguides to
complete, one each to cover Administration and Management,
Staff Development, Programs for Children, Programs for Parents,
and Demonstration and Dissemination Components. Each workguide
contained tasks which an HCEEP project should complete as its
program evolved. After completing each workguide, the project
filled in a checklist on the front page giving a quick summary
of the status of project development in that component. (See
Figure 5 for example of Administration and Management Checklist.)

FIGURE 5 (1975-76)
(From: Workguide)

Name_____

Project_____

Project Development
Administration And Management
Checklist

DIRECTIONS: After you have completed   Date:
the attached workguide, fill in this
checklist.

	Must be considered and planned	Plan partially completed	Written statement available and/or task completed
1. A description of your project's overall mission	☐	☐	☐
2. A definition of the unique features of the program, in terms of (1) demonstrating services and/or (2) developing products	☐	☐	☐
3. Specification of the characteristics of your target group	☐	☐	☐
4. Development of a plan for selecting an advisory board	☐	☐	☐
5. A statement of the project's relationship with its fiscal agency (i.e., the organization that has agreed to administer your grant)	☐	☐	☐
6. General statement of the program delivery system to be used in meeting the needs of children &	☐	☐	☐
7. General statement of the program delivery system to be used in meeting the needs of parents	☐	☐	☐
8. Specification of staff positions and of respective job descriptions	☐	☐	☐
9. Description of the way staff roles have been adequately met with the staff hired	☐	☐	☐
10. Identification of resources outside of the project that will be used to provide expanded services to clients	☐	☐	☐
11. Specification of plans for a cost analysis system	☐	☐	☐
12. Adoption of a comprehensive evaluation plan	☐	☐	☐

The second major change in the needs assessment process was
that the TADS Organizational Profile (TOP), rather than being
used as an organization and management assessment tool, was
used as an instrument to identify needs for technical help.
It was used with all first-, second-, and third-year projects --
on-site or off-site. Additional items had been added to the
TOP based on feedback from the previous year.

TADS had to conduct ninety needs assessments in the fall. Therefore,
the first needs assessor's training meeting was held early in
September. The needs assessors included some TADS staff, some
TADS advisors, some HCEEP project directors, and some professionals
from the field of Early Childhood/Special Education. TADS oriented

15   16

twenty people to its organization and technical assistance
process and trained them in the needs assessment process:
including the TOP, Program Planning Workguides, and agreement
writing.

1976-77

The process developed the previous year was used again in
1976-77. The TOP was expanded to assess "Staff" as well as
the three original areas (see Figure 6). All first-year
projects continued to receive on-site needs assessments.
Variations in needs assessment procedures were tried with
second-year projects: (1) conducting needs assessments by
telephone and (2) offering an Evaluation Track option.

TADS decided to try telephone needs assessments for two
reasons: the large number of clients and the success of the
systematic approach to a needs assessment which the Program
Planning Workguides (see Figure 5) and the TOP (see Figure 6)
had facilitated. Six second-year projects that were meeting
their goals and objectives and maintaining a positive rapport
with TADS were identified. When contacted, each agreed to
have a telephone needs assessment in place of an on-site visit.

The assessment materials were mailed to each project. A
time for the phone call was scheduled by the TADS staff needs
assessor with the project's contact person to occur, typically,
after TADS received the completed Program Planning Workguides,
continuation proposal, and progress report for review. The
telephone needs assessment included a discussion of the
reviewed material and a joint rating of the TOP. Since this
was a lengthy procedure in itself, usually another phone call
was scheduled to complete the needs assessment -- confirming
needs, timelines, and kinds of assistance.

The Evaluation Track, which a project could choose instead of
a comprehensive needs assessment, provided a yearlong series
of consultations in evaluation planning. Nine second-year
projects opted for this alternative in lieu of on-site
needs assessments. These projects felt their "need" priority was
evaluation. There was no further assessment of needs for those
who chose this option. A Technical Assistance Agreement was written
with each project outlining a comprehensive, on-site delivery
method with an evaluation consultant.

Third-year projects were "weaned" from TADS by having the option
of attending a topical conference in Demonstration/Dissemination
Activities at TADS expense. There were no needs assessments with
third-year projects.

1977-78

During the spring of 1977, TADS supported an external evaluation

16   1/

FIGURE 6 (1976-77)
Cover Page of TOP

Project _____

Project Person(s) Interviewed_____

Date _____

Interviewer _____

| TADS |
| ORGANIZATIONAL |
| PROFILE |

Scoring Instructions: After completing each section, fill out the corresponding column on the front page as follows:

   a. circle the number of each question marked "yes."

   b. place an "X" beside the number of each question marked technical assistance need.

	Children	Parents	Staff	Decision Makers
Demonstration & Dissemination	27 26 25 24	27 26 25 24	27 26 25 24	
Program Evaluation	23 22 21 20 19 18	23 22 21 20 19 18	23 22 21 20 19 18	23 22 21 20 19 18
Program Implementation	17 16 15 14 13	17 16 15 14 13	17 16 15 14 13	17 16 15 14 13
Program Planning	12 11 10 9 8 7 6	12 11 10 9 8 7 6	12 11 10 9 8 7 6	12 11 10 9 8 7 6
Concepts & Knowledge	5 4 3 2 1	5 4 3 2 1	5 4 3 2 1	5 4 3 2 1

of the procedures and materials it used in determining the effectiveness of technical assistance. As a result of that evaluation, the needs assessment materials were redesigned to provide more specific information for evaluating the assistance given.

During the summer of 1977, the Project Development Profile was drafted, to replace the TOP. The new instrument's major advantage was that it allowed TADS to get a better fix on the project's needs. It was divided into six major program areas (Services to Children; Services to Parents; Demonstration, Dissemination, and Continuation; Staff Development; Evaluation; and Administration and Management) and three developmental sequence areas (Initial Development; Program Planning; and Implementation).

Five demonstration projects -- one first-year, two second-year, and

two third-year -- field tested the new materials. Minor modifications were made based upon the field-test experiences and the materials were prepared for use with projects.

On November 8-9, 1977, TADS held a training meeting for thirty needs assessors. Fifteen trainees were totally new to TADS needs assessment process. (See Figure 7 for agenda topics.) The purposes of the new Profile and how to use it with the projects were the primary foci of the meeting.

In mid-winter of that year, the U.S. Office of Education determined that the needs assessment forms should undergo "clearance" before their use could be required of projects. TADS immediately notified its needs assessors and clients, instructing them not to require that the forms be filled out in preparation for the assessment but to use them only for informal planning.

Since the forms-clearance process would take several months, TADS designed alternative needs assessment and technical-assistance delivery processes for second- and third-year projects. Small-group meetings on topics with which projects tended to need help were offered to all clients. They could select, via mail or telephone, two such meetings to attend at TADS expense.

These small groups each involved four to seven projects working with consultants to address areas of need. Group presentations

---

FIGURE 7 (1977-78)
Agenda Topics
TADS Needs Assessment Training
November 8-9, 1977

Tuesday, November 8th

SESSION I

1:00 - 2:30 - - Welcome, Introductions, and Overview of the training workshop Sonya Johnston

Overview of TADS Workscope - Tal Black

Purposes of Needs Assessment and relationship to evaluation of technical assistance - Tanya Kniefel

Needs Assessment options for projects and matching of needs assessors to projects - Sonya Johnston

2:30 - 2:45 - - Break

2:45 - 3:30 - - Review of TADS' HCEEP Development Profile - Tal Black

3:30 - 4:15 - - Simulation exercise

4:15 - 5:00 - - Feedback session - Mary Patten

5:00 - 6:00 - - Attitude adjustment period

6:00 - 7:30 - - Dinner (Group Banquet)

7:30 - 8:00 - - Break

SESSION II

8:00 - 8:15 - - Telephone Needs Assessment - Sonya Johnston, Mary Patten

8:45 - 9:15 - - The Needs Assessment Process: Affective Dimensions, Handy Hints Tal Black

9:15 - 9:30 - Break

9:30 - 10:00 - Confidentiality and Needs Assessment - David Lillie

10:00 - 10:30 - Questions and General discussion

Wednesday, November 9th

SESSION III

8:30 - 9:30 - - "That night in the motel," - Tal Black

Service Delivery Methods
On-site consultation - Tal Black
Evaluation track - Tanya Kniefel
Project visitation - Sonya Johnston
Information Services - Mary Patten
Review and Critique - Tal Black

9:30 - 9:45 - - Break

9:45 - 10:15 - - Use of the technical assistance agreement worksheet - Tal Black

10:15 - 11:00 - - Simulation exercise

11:00 - 11:30 - - Feedback session - Mary Patten

11:30 - 12:00 - - Report Forms and Wrap Up - Sonya Johnston

18

with discussions and individual consultations occurred. Plans
for any additional technical assistance were made during these
consultations.

1978-79

While waiting for the forms-clearance process to be completed,
TADS formulated an alternative plan as follows:

1. TADS mailed to each HCEEP project the needs assessment
   instrument and planning guide (Profile) with instructions
   for the project's staff to review it prior to the needs
   assessor's visit.

2. When the needs assessor arrived, the project had the
   choice: a) of requesting the Profile be used and the
   tasks rated or b) of discussing the tasks in each
   component without using the rating scale. With either
   choice, the Profile remained with the project.

3. Needs assessor and project staff developed a tentative
   technical assistance agreement and sent it to TADS.

On October 9, 1978, seventeen of TADS needs assessors attended
a meeting to review the new Profile and the revised needs
assessment forms, specifically the Technical Assistance Agreement
Work Sheets.

One of the most time consuming tasks for TADS staff during this year
was transforming all of these materials from the needs assessors
into written Memoranda. Therefore, the new Work Sheets (Figure 8)
were designed to include <u>need</u> and <u>objective</u> statements and activity
steps with <u>timelines</u>; Figure 9 shows sample timelines. These features
made it easier to develop the Memoranda and deliver technical
assistance.

1979-80

Conducting assessments on-site with trained needs assessors was
highly successful in terms of client satisfaction and identification
of technical assistance needs. The costs, however, were high.
Both TADS and the federal funding agency were interested in
determining if less expensive strategies could be used effectively.
As a result, a special evaluation of three types of needs assessment
was conducted: on-site, telephone, and self-administered.
Five needs assessment manuals were written in September and
October of 1979 to implement the special study. They were:
1) An On-Site Needs Assessment Manual for Projects, 2) An On-Site
Needs Assessment Manual for Needs Assessors, 3) A Telephone Needs
Assessment Manual for Projects, 4) A Telephone Needs Assessment
Manual for Needs Assessors, and 5) A Self-Assessment Manual for
Projects.

FIGURE 8 (1978-79)
Sample Work Sheet

```
┌─────────────────────────────────────────────────┐
│ TECHNICAL ASSISTANCE AGREEMENT WORK SHEET │
└─────────────────────────────────────────────────┘
```

PRIORITY NUMBER _____   PROJECT: _____

1. NEED STATEMENT: "Assistance in _____

   _____

   _____

   _____

II. FOCUS of TECHNICAL ASSISTANCE (Check the appropriate focus as confirmed with project director)	III. TARGETS of TECHNICAL ASSISTANCE: (List by title the staff person(s) involved in addressing this need)	IV. DEADLINE(S): (Date or dates when technical assistance objectives should be completed)
_____ Knowledge and Awareness	_____	_____
_____ Skill Development	_____	_____
_____ Product Development	_____	
_____ Decision/Change		

V. TECHNICAL ASSISTANCE OBJECTIVE FORMULA: BY (see #IV above for deadline(s)) THE (see #III for targets) _____

   (choose one of the following) _____

   a. (if the focus of technical assistance is knowledge and awareness state) WILL BE KNOWLEDGEABLE (and then state the specific knowledge to be acquired).

   b. (if the focus of technical assistance is skill development state) WILL BE ABLE TO (and then state the specific skill(s) to be acquired).

   c. (if the focus of technical assistance is product development state) WILL DEVELOP (and then state the product to be developed).

   d. (if the focus of technical assistance is decision/change state) WILL SELECT, ADOPT, OR REVISE (then state the decision/change to be made).

   TECHNICAL ASSISTANCE OBJECTIVE(S): (use the above formula to write objective(s))

   _____

   _____

   _____

   _____

   _____

   _____

   _____

VI. TECHNICAL ASSISTANCE ACTIVITIES: (check the technical assistance delivery method or combination of methods that will be used to address the need)

   _____ On-Site Consultation   _____ Information Services   _____ Review and Critique   _____ Project Visitation

   _____ Off-Site Consultation   _____ Small Group Consultation   _____ Other (describe) _____

   _____

```
┌──────────────────────────────────┐
│ (OVER FOR SEQUENCES OF ACTIVITIES) │     _____
└──────────────────────────────────┘
```

21

FIGURE 8 (continued) (1978-79)
Sample Work Sheet

PAGE 2 OF TECHNICAL ASSISTANCE AGREEMENT WORK SHEET

VII.   SEQUENCE OF ACTIVITIES: (Using the Sequence of TA Activities forms, one corresponding to each technical assistance
       delivery method listed in number VI, please list the steps necessary to accomplish the Technical Assistance Objective
       listed on the front page. If more than one objective is listed, please indicate which steps correspond to which
       objective. Please indicate the date by which each step should be accomplished. The first step should occur at least
       two or three weeks after the needs assessment visit. Please use combinations of sequences when appropriate.)

STEP 1: BY _____ (date). _____

_____

_____

STEP 2 BY _____ (date). _____

_____

_____

STEP 3: BY _____ (date). _____

_____

_____

STEP 4: BY _____ (date). _____

_____

_____

STEP 5: BY _____ (date). _____

_____

_____

STEP 6: BY _____ (date). _____

_____

_____

STEP 7: BY _____ (date). _____

_____

_____

VIII. RECOMMENDATIONS, QUALIFICATIONS, AND OTHER INFORMATION: (Please list: (1) any specific qualifications the
       consultant should have and/or recommended consultants for on- or off-site consultations and review and critiques,
       (2) any specific qualifications for selecting programs and/or recommended programs for a project visitation, and/or
       (3) any specific information that will help clarify the information needed for an information service.)

_____

_____

_____

_____

_____

_____

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FIGURE 9 (1978-79)
Sample Work Sheet

SEQUENCE OF TECHNICAL ASSISTANCE ACTIVITIES

FOR

=====> | ON-SITE CONSULTATIONS | <=====

STEP
NUMBER      ACTIVITIES                                                    TIMELINE
-------------------------------------------------------------------------------------

1.  The project will complete and send to TADS a Consultation Preparation    8 weeks prior to
    Form.                                                                     consultant visit.

2.  TADS will identify and confirm with the project the consultant(s).        6 weeks prior to
    (Specify the number of consultant days and visits.)                       consultant visit

3.  TADS and project will confirm the dates of the consultant's visit.        4 weeks prior to
                                                                              visit

4.  The consultant will visit the project for  (Specify number)
    days to address the need.  (Please list in section VIII of TAA            As requested by
    Work Sheet the specific tasks the consultant will address and/or          the project
    other necessary activities.)

5.  The consultant will send to the project and TADS a summary                2 weeks after
    report on the visit including recommendations for follow-up               the visit
    activities.
-------------------------------------------------------------------------------------
```

All of the manuals were designed to guide the user through
a step-by-step review of a demonstration project's program
and plans for the current year and to identify both project
and technical assistance needs. Each manual was divided
into the following sections:

1.   Introduction -- Background information on TADS and
     technical assistance

2.   Program Review -- Procedures for conducting a com-
     prehensive review of the project, including the
     needs assessment instrument

3.   Agreements -- Procedures for developing a tentative
     technical assistance agreement

4.   Summary and Evaluation -- Summary report forms and
     evaluation forms

5.   Supplements -- A glossary of terms, trouble-shooting
     questions and answers, examples of technical assistance
     agreements, etc.

The manuals captured the TADS needs assessment process and procedures more completely than ever before.

Since most needs assessors had been trained in the previous two years to use our procedures, the mail and phone were employed to update assessors regarding the new study, the new manuals, and project assignments.

Figures 10, 11, and 12 describe the three types of needs assessments which were being conducted and studied.

1980-81

The decisions made as a result of the special study of needs assessments were: 1) to use on-site needs assessments with first-year projects and any second- and third-year projects who requested them, and 2) to use self-assessments with all other second- and third-year projects. TADS also decided to streamline the five needs-assessment manuals into one: TADS Needs Assessment Procedures Manual (Black, Cox, and Prestridge, 1980). The manual is a guide for reviewing projects to identify technical assistance needs; it includes:

1. a description, background, and overview of the TADS technical assistance process;

2. recommended procedures for conducting a comprehensive program review and identifying areas needing change;

3. procedures for selecting those needs or areas in which technical assistance from TADS would be beneficial.

4. guidelines for developing the tentative technical assistance agreements; and

5. procedures for summarizing the needs assessment process.

The manual includes materials to help plan programs, develop model programs, facilitate staff development, and write progress reports.

There were eighteen on-site and twenty-seven self-administered needs assessments conducted in 1980-81. The feedback on the current manual has been very positive from the needs assessors and projects.

FIGURE 10
Needs Assessment Studies

ON - SITE NEEDS ASSESSMENT

I. General Description of Needs Assessment: Needs assessment is the first step each year in the TADS approach for the provision of technical assistance services. TADS has determined that any form of needs assessment must address the following issues:

    1. A systematic needs assessment process is essential to effectively identify technical assistance needs.

    2. A needs assessment must occur before extensive individualized technical assistance is provided.

    3. Technical assistance needs can best be identified by a comprehensive program review and an interactive process between the technical assistance provider and client.

    4. The roles, responsibilities, and expectations for the provision of technical assistance must be clarified during the needs assessment.

    5. A needs assessment must establish and/or enhance a trusting relationship between the technical assistance provider and the technical assistance recipient.

II. Specific Description: An on-site needs assessment is conducted by a TADS trained needs assessor in conjunction with the project staff of the program being assessed. Usually the on-site visit last for 1½ days.

III. Activities/tasks to Accomplish an On-site Needs Assessment: The following sequence outlines those activities that are suggested for preparation, implementation, and follow-up of the needs assessment.

    A. Preparation Activities:

      1. TADS TA Coordinator, the project director, and the needs assessor confirm the dates that the needs assessment will be conducted.

      2. The needs assessor and the project exchange information necessary to prepare for the visit (develop a tentative agenda, make logistical arrangements, provide the needs assessor with copy of the project's current program plan/proposal, etc.).

      3. TADS mails a needs assessment package to the project two weeks prior to the scheduled dates.

    B. On-site Activities:

      1. Introduction activities are conducted to provide an opportunity for the needs assessor and the project staff to get acquainted; review the major dimensions of the program and staff responsibilities; and discuss any parts of the project's proposal or current activities which are unclear to the needs assessor.

      2. The needs assessor reviews the purposes and procedures for the needs assessment and answers any general questions about TADS and its activities.

      3. The needs assessor and project staff conduct a comprehensive review of the project and its plans for the year using the *HCEEP Demonstration Projects Profile*. Each item on the Profile is rated. This task will consume the major portion of the first day of the needs assessment.

      4. The needs assessor develops a tentative list of needs or areas that the project may wish to address in the up-coming year. These needs are based upon the data collected on the *HCEEP Demonstration Projects Profile* and discussions of other relevant areas from activity No. 3 above.

      5. The project staff and the needs assessor review, refine, and confirm the list of needs and determine which are most appropriately addressed by the project staff and which will require resources from the outside to address. Those needs that TADS will assist the project in addressing are ranked in order of priority by the project staff.

      6. Using the technical assistance agreement worksheets, the project staff and needs assessor develop an objective for each need and a sequence of activities to address each objective. These completed worksheets form a set of tentative technical assistance agreements.

    C. Follow-up Activities:

      1. The needs assessor returns all materials to TADS within 5 working days after the completion of the visit.

      2. If necessary your TA Coordinator will contact you by phone to discuss the agreement, including asking any clarifying questions, and to indicate any need to alter the tentative plans developed on-site.

      3. TADS develops a "Memorandum of Agreement" containing the technical assistance agreements developed by the project staff and needs assessor. Then TADS mails them to the project for approval and signature (within two to four weeks after receiving the needs assessor's report).

FIGURE 11
Needs Assessment Studies

OFF-SITE TELEPHONE NEEDS ASSESSMENT

I. General Description of Needs Assessment: Needs assessment is the first step each year in the TADS approach for the provision of technical assistance services. TADS has determined that any form of needs assessment must address the following issues:

  1. A systematic needs assessment process is essential to effectively identify technical assistance needs.
  2. A needs assessment must occur before extensive individualized technical assistance is provided.
  3. Technical assistance needs can best be identified by a comprehensive program review and an interactive process between the technical assistance provider and client.
  4. The roles, responsibilities, and expectations for the provision of technical assistance must be clarified during the needs assessment.
  5. A needs assessment must establish and/or enhance a trusting relationship between the technical assistance provider and the technical assistance recipient.

II. Specific Description: This needs assessment is conducted through a series of planned phone conversations between the project and TADS trained needs assessor. Usually it is necessary for the needs assessor and the project to interact over the telephone from three to five times. This needs assessment process takes approximately two days of your time over a two week period. An on-site follow-up visit is available when in the opinion of the project, TADS, and the needs assessor it is necessary to complete the needs assessment.

III. Activities/task to Accomplish an Off-site Telephone Needs Assessment: The following sequence outlines those activities that are suggested for preparation, implementation and follow-up of the needs assessment.

A. Preparation Activities:
  1. TADS, the project director, and the needs assessor confirm the schedule of dates for the needs assessment and set a time and date for the first telephone call.
  2. TADS mails a needs assessment package to the project two weeks prior to the scheduled dates.
  3. The project staff completes an initial assessment package including the *HCEEP Demonstration Projects Profile* (Note: any items that are unclear or need further explanation may be left blank since there will be an opportunity for the project and the needs assessor to interact later.)
  4. The project director sends the completed materials and a copy of the project's current program plans/proposal to the needs assessor.
  5. The needs assessor reviews all of the materials, develops a list of question, if any, which need clarifying; and develops a tentative list of program needs or areas where the project may desire change.

B. Off-site Activities (3 to 5 telephone calls):
  1. The needs assessor discusses the purposes and the activities to accomplish the needs assessment with the project.
  2. The needs assessor and project discuss any questions that need clarifying, both items from the profile and any general questions about TADS and its activities.
  3. The project and needs assessor discuss the project's current status, i.e., the list of program needs or areas that change is desired.
  4. The needs assessor and the project confirm a priority list of needs that will be addressed through TADS.
  5. The project and needs assessor develop a tentative technical assistance agreement for each need using the technical assistance agreement worksheets (which specifies an objective, timeline, and activities).

C. Follow-up Activities:
  1. The needs assessor returns all materials to TADS within 5 working days after the scheduled completion date.
  2. If necessary an on-site follow-up visit is scheduled. (If there is a follow-up visit the needs assessment and tentative technical assistance agreement will be completed at that time.).
  3. TADS develops a "Memorandum of Agreement" containing the technical assistance agreements developed by the project and needs assessor The memorandum is then mailed to the project for approval and signature (within two to four weeks after receiving the needs assessor's report).

25

26

FIGURE 12
Needs Assessment Studies

SELF-ADMINISTERED NEEDS ASSESSMENT

I. General Description of Needs Assessment: Needs assessment is the first step each year in the TADS approach for the provision of technical assistance services. TADS has determined that any form of needs assessment must address the following issues:

1. A systematic needs assessment process is essential to effectively identify technical assistance needs.
2. A needs assessment must occur before extensive individualized technical assistance is provided.
3. Technical assistance needs can best be identified by a comprehensive program review and an interactive process between the technical assistance provider and client.
4. The roles, responsibilities, and expectations for the provision of technical assistance must be clarified during the needs assessment.
5. A needs assessment must establish and/or enhance a trusting relationship between the technical assistance provider and the technical assistance recipient.

II. Specific Description: A self-administered needs assessment is conducted by the project staff using a set of recommended procedures. It is expected that this process will take approximately two days. One person on the TADS staff will be available by phone during the scheduled two days to answer any questions that may arise. An on-site follow-up visit is available when in the opinion of the project and TADS it is necessary to complete the needs assessment.

III. Activities/tasks to Accomplish a Self-Administered Needs Assessment: The following sequence outlines those activities that are suggested for preparation, implementation, and follow-up of the needs assessment.

A. Preparation Activities:
1. TADS and project director confirm the dates that the self-administered needs assessment will be conducted and who will be available at TADS during those dates.
2. TADS mails the "Self-Administered Needs Assessment Manual" to the project two weeks prior to the scheduled dates.
3. TADS contacts the project to clarify the procedures and expectations of the suggested self-assessment strategies.

B. Self-Assessment Activities:
1. The project conducts a comprehensive review of their program's current status using the *HCEEP Demonstration Projects Profile* and the procedures outlined in the "Self-Administered Needs Assessment Manual."
2. The project staff develop a comprehensive list of needs or areas of desired change and select those needs that will be addressed through assistance from TADS. This list is put in priority order.
3. Using the procedures outlined in the manual the project staff develops a tentative technical assistance agreement by completing the necessary technical assistance agreement worksheets.

C. Follow-up Activities:
1. The project sends all completed materials to TADS within 5 working days after the scheduled self-assessment.
2. TADS reviews all the materials provided and develops a list of questions, if any, which need clarifying.
3. TADS contacts the project by telephone to clarify any questions, confirm the technical assistance needs, and determine whether or not a follow-up visit is needed.
4. If necessary, an on-site follow-up visit is scheduled. (If there is a follow-up visit the needs assessment and tentative agreement will be completed at that time.)
5. TADS develops a "Memorandum of Agreement" containing the technical assistance agreements developed by the project. The memorandum is then mailed to the project for approval and signature (within two to four weeks after receiving the project's self-administered assessment materials).

26

CURRENT NEEDS ASSESSMENT PROCEDURES

The evolution of the process just described led to a set of procedures now in use with all projects. These methods, explained in the following pages, are outlined in depth in TADS Needs Assessment Procedures Manual (Black, Cox, and Prestridge, 1980) and in supplemental materials.

On-Site and Self-Administered Needs Assessments

Needs assessments are administered either by a trained needs assessor or by the client. First-year demonstration projects work with a needs assessor, while second- and third-year projects generally conduct self-assessments.

The first-year assessment accomplishes several objectives:

1. The project receives a comprehensive program review.

2. Needs which technical assistance can address are identified.

3. The foundation for a trusting relationship between the client and TADS is built. (The personal contact involved in an on-site needs assessment is felt to be essential in promoting this relationship.)

Experience has shown that given the structure of the materials and the training provided in an on-site needs assessment, first-year projects are quite capable of (and satisfied with) conducting subsequent years' needs assessments themselves.

Scheduling

Most needs assessments must occur between October and February if technical assistance services are to be delivered within our clients' fiscal year (July 1 - June 30). Within that five-month time frame, we try to be flexible about scheduling. On-site needs assessments generally take one-and-one-half to two days. Projects which conduct self-assessments may schedule a similar amount of time or may elect to schedule shorter sessions

28

over a period of days. Factors which tend to influence earlier versus later scheduling are: year of funding (first, second, or third), the hiring of project staff, and project idiosyncrasies.

Matching the Needs Assessor to the Project

Two areas in which we try to ensure that the assessor is well suited to the client are: 1) fiscal agency background and 2) content specialty. For example, we try to make sure that someone with local education agency experience is used to assess a project with such an agency as a fiscal agent. We also try to ensure that the assessor is experienced with the kind of children the project serves -- in terms of handicaps, socioeconomics, ethnicity, etc.

The attention to details has paid off repeatedly. A needs assessor with the right background who goes into a project can frequently solve some needs on the spot -- before developing an agreement for other needs.

Preparing for the Needs Assessment

The needs assessor and the person in charge of facilitating the assessment are expected to become familiar with:

1. The grant proposal: the project's statement of intent

2. The HCEEP Demonstration Project Profile and the HCEEP Model Development Guide (developed by the Office of Special Education): tools for examining project accomplishments and goals across components

The Profile and Guide are part of the package, which also includes the TADS Needs Assessment Procedures Manual and several forms, sent to the needs assessor and the project two weeks prior to the assessment.

The dates selected for the needs assessment should be chosen so that all of the staff can participate as fully as possible. The project's fiscal agency should also be involved. An agenda must be developed prior to the

28

needs assessment.   A sample agenda is depicted in Figure 13.

Implementation

The Profile.   The needs assessor must review the role of TADS and the
needs assessment with staff members. Then, a component-by-component analysis
of the project's status using the HCEEP Demonstration Project Profile is begun.
Components are: Services to Children; Services to Parents; Staff Development;
Demonstration, Dissemination, and Continuation; and Administration and
Management. Each of these components is considered in terms of conceptualization,
implementation, and evaluation. The Profile design allows the current status
to be rated, desired changes in status to be indicated, and technical assistance
needs stated. Figure 14 illustrates the format.

After all components on the Profile have been rated, the information
is transferred to the Summary Page (See Figure 15) which is a quick visual
reference of project needs. The project then orders the needs according to
priority.

FIGURE 13
Sample Agenda

SAMPLE AGENDA FOR CONDUCTING A TADS NEEDS ASSESSMENT

FIRST DAY - INTRODUCTION AND PROGRAM
            REVIEW

1 1/2 hours -- INTRODUCTION AND OVERVIEW:
               OSE; HCEEP; TADS and Needs Assessment;
               Purposes and Benefits; and The Project
               - Major Goals and Objectives, Staff
               Roles, and Program Components

15 minutes -- BREAK

2 hours -- PROGRAM REVIEW: Services for Children
           and Parents Components

1 hour -- LUNCH

1 1/2 hours -- PROGRAM REVIEW: Staff Development
               and Demonstration, Dissemination,
               and Continuation Components

15 minutes -- BREAK

1 hour -- PROGRAM REVIEW: Administration and
          Management Component

1/2 to 1 hour -- SUMMARY AND REVIEW: Develop List
                 of Areas of Desired Change for
                 Forthcoming Year and Check for
                 Completeness

SECOND DAY - DEVELOPMENT OF TENTATIVE TECHNICAL
             ASSISTANCE AGREEMENTS

1/2 hour -- REVIEW AND INTRODUCTION

1 hour -- SELECT NEEDS BEST ADDRESSED WITH ASSISTANCE FROM
          TADS

15 minutes -- BREAK

1 hour -- DEVELOP TENTATIVE TA AGREEMENTS: Needs Statement,
          Focus, Target(s), Deadlines, and Objectives(s)

1 hour -- LUNCH

1 1/2 hours -- DEVELOP TENTATIVE TA AGREEMENTS: Select TA
               Activities, Sequence Activities, and Provide
               Qualifying Comments

15 minutes -- BREAK

1 1/2 hours -- SUMMARY AND REVIEW: Review All Tentative TA
               Agreements for Completeness and Clarity.
               Review "Next Steps," Summarize Entire Two Days,
               and Complete TADS Evaluation Forms

29   30

FIGURE 14
Sample Summary Page from the Profile

	CURRENT PROJECT STATUS				Desired Change In Status During This Year	Technical Assistance Need
	Not Relevant To The Project	Must Be Considered And Planned	Task Partially Completed	Task Completed/ In Operation		

STAFF DEVELOPMENT COMPONENT

This component identifies tasks that relate to the professional development of project staff. It includes determining staff development needs, resources, and plans to meet those needs.

Conceptualization

1. The project has a written statement of goals and objectives for the Staff Development Component.	0	1	2	3	——	——

The project has a written statement of and/or clearly delineated plans and procedures for . . .

2. . . . orienting staff to the project and the Handicapped Children's Early Education Program.	0	1	2	3	——	——
3. . . . identifying the competencies necessary to fulfill each staff role.	0	1	2	3	——	——
4. . . . determining staff development/training needs.	0	1	2	3	——	——
5. . . . a staff development/training program that addresses the currently identified needs.	0	1	2	3	——	——
6. . . . assigning staff responsibilities within the Staff Development Component.	0	1	2	3	——	——
7. . . . maintaining records on the activities of the Staff Development Component.	0	1	2	3	——	——

OTHER CONCEPTUALIZATION TASKS:

_____	0	1	2	3	——	——
_____	0	1	2	3	——	——

Implementation

8. Current staff have been oriented to the project and to the Handicapped Children's Early Education Program.	0	1	2	3	——	——
9. Staff development/training needs have been identified.	0	1	2	3	——	——
10. Resources needed for implementing the staff development/training program have been acquired.	0	1	2	3	——	——
11. Staff development activities are ongoing and/or completed.	0	1	2	3	——	——
12. Records on the activities of the Staff Development Component are being maintained.	0	1	2	3	——	——

OTHER IMPLEMENTATION TASKS:

_____	0	1	2	3	——	——
_____	0	1	2	3	——	——

Evaluation

Data are being collected to . . .

13. . . . document the existing staff development needs of project staff.	0	1	2	3	——	——
14. . . . document the extent to which all planned staff development activities were provided.	0	1	2	3	——	——
15. . . . document the extent to which goals and objectives of the Staff Development Component have been attained.	0	1	2	3	——	——
16. . . . document the extent to which staff members were satisfied with the staff development program.	0	1	2	3	——	——
17. . . . document the extent of progress or change in staff knowledge/skills as a result of staff development activities (where appropriate).	0	1	2	3	——	——
18. . . . document the extent to which project staff have acquired the competencies necessary to fulfill their respective staff roles.	0	1	2	3	——	——

FIGURE 15
Sample Profile Summary

HCEEP DEMONSTRATION PROJECT PROFILE
SUMMARY PAGE

Directions: (1) After completing the entire HCEEP Demonstration Project Profile: A Needs Assessment Instrument, CIRCLE the numbers of each task in each program component that you indicated a desire for change in status during the current funding year.

(2) Place a "X" through any circled task number that you indicated a need for "outside" or technical assistance.

(3) Example: ① 2 3 ⊗ 5 ⊙ ⊗ 8

PROGRAM DEVELOPMENT PHASES

	Conceptualization	Implementation	Evaluation
I. Administration and Management Component			
Program Planning	1 2 3 4 5 6 7 8	34 35 36 37 38 39	59 60 61 62 63 64
Personnel	9 10 11	40 41	Ot. ___ ___ ___
Physical Arrangements	12 13 14	42 43 44	
Financial Administration	15 16 17	45 46	
Evaluation Planning	18 19 20 21 22 23 24 25 26	47 48 49 50 51	
Records and Reports	27 28	52 53	
Advisory Boards	29 30 31	54 55	
Coordination with Other Agencies	32 33	56 57 58	
	Ot.	Ot. ___ ___ ___	
II. Services to Children Component	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 Ot.	19 20 21 22 23 24 25 26 27 28 29 30 31 32 Ot. ___ ___ ___	33 34 35 36 37 38 39 40 Ot. ___ ___ ___
III. Services to Parents Component	1 2 3 4 5 6 7 8 9 10 Ot. ___ ___ ___	11 12 13 14 15 16 17 18 19 Ot. ___ ___ ___	20 21 22 23 24 25 Ot. ___ ___ ___
IV. Staff Development Component	1 2 3 4 5 6 7 Ot. ___ ___ ___	8 9 10 11 12 Ot. ___ ___ ___	13 14 15 16 17 18 Ot. ___ ___ ___
V. Demonstration, Dissemination and Continuation Component	1 2 3 4 5 6 7 8 9 10 11 12 13 14 Ot. ___ ___ ___	15 16 17 18 19 20 21 22 23 24 Ot. ___ ___ ___	25 26 27 28 29 Ot. ___ ___ ___

The Work Sheets. Each technical assistance need is recorded on a Work Sheet (Figure 16). The focus of the technical assistance, the people who will be direct recipients of the assistance, and the date by which the assistance is to be completed are all included on this form. Then this information is used to write a Technical Assistance Objective. Finally, a delivery method that addresses the need efficiently and effectively is chosen.

Sequence-of-Technical-Assistance Activities (Figure 17). For each delivery method listed on the Work Sheet, a Sequence form has been developed.

31

FIGURE 16
Sample: A Completed Work Sheet

NEED PRIORITY NUMBER `1`

| TECHNICAL ASSISTANCE AGREEMENT WORK SHEET |

PROJECT: _BABY Learning and PARENTING Project_

I. NEED STATEMENT: "Assistance in _refinement and selection of appropriate and NON-discriminatory assessment techniques for infants ages birth to 36 months._

II. **FOCUS OF TECHNICAL ASSISTANCE:**
(Choose only ONE focus for each objective)

____ Knowledge and Awareness

_X_ Skill Development

____ Product Development

____ Decision/Change

III. **TARGETS OF TECHNICAL ASSISTANCE:**
(List by title the staff person(s) involved in addressing this need)

Project Coordinator, Child Development Specialist, and 3 Home Therapists

IV. **DEADLINE(S):**
(Date or dates of technical assistance objectives should be completed)

January 18, 1980

V. **TECHNICAL ASSISTANCE OBJECTIVE FORMULA: BY** _____ (See No. IV above for deadline(s)) **THE** _____ (see No. III for targets)

(choose one of the following)

a. (If the focus of technical assistance is knowledge and awareness state) WILL BE KNOWLEDGEABLE (and then state the specific knowledge to be acquired).
b. (If the focus of technical assistance is skill development state) WILL BE ABLE TO (and then state the specific skill(s) to be acquired).
c. (If the focus of technical assistance is product development state) WILL DEVELOP (and then state the product to be developed).
d. (If the focus of technical assistance is decision/change state) WILL SELECT, ADOPT, OR REVISE (then state the decision/change to be made).

TECHNICAL ASSISTANCE OBJECTIVE(S): use the above formula to write objective(s)

By January 18, 1980, the designated project staff will be able to administer the "Ordinal Scales of Psychological Development" and interpret the results.

VI. **TECHNICAL ASSISTANCE ACTIVITIES:** (check the technical assistance delivery method or combination of methods that will be used to address the need)

_X_ On-Site Consultation   ____ Information Services   ____ Review and Critique   ____ Project Visitation

____ Off-Site Consultation   ____ Small Group Consultation   ____ Other (describe) _____

Choose the Sequence of Technical Assistance Activities work sheet(s) that corresponds to the delivery method selected in VI. above. Complete the work sheet(s) and attach.

FIGURE 17
Sequence of Technical Assistance Activities
Sample

SEQUENCE OF TECHNICAL ASSISTANCE ACTIVITIES

FOR

| ON-SITE CONSULTATIONS |

1

NEED
PRIORITY
NUMBER

VII: Sequence of Activities: The primary purpose for this form is to indicate the *dates* of the activities that both the project staff and TADS need to accomplish in order to address the technical assistance objective and need that are associated with this activity sequence. If more than one objective is listed for an individual need there should be separate activities indicated for each objective. See Section III of the manual for a more detailed discussion of how to use this form. (*The first step should occur at least two to three weeks after completion of the needs assessment.)

STEPS   ACTIVITY DESCRIPTION

1. By _November 17, 19--_ (date).* . . . . the project will complete and send to TADS a Consultation Preparation
   (8 weeks prior to Step 4)   Form.

2. By _December 1, 19--_ (date), ... TADS will identify and confirm with the project the consultant(s). TADS
   (6 weeks prior to Step 4)   will support the consultant's services for up to _15_ days and _1_ visits
                                                     to the project. (Specify the number of consultant days and visits.)

3. By _December 15, 19--_ (date), ... TADS and the project will confirm the dates of the consultant's visit.
   (4 weeks prior to Step 4)

4. By _January 11, 19-_ (date), ... the consultant will visit the project for _1½_ days to _provide train-_
   (as requested by the project)   _ing on the Uzgiris and Hunt Scales through_
                                                     demonstration to and observation of the project staff
                                                     (Please specify number of days of consultant's first visit and the specific
                                                     tasks to be addressed, use the back of this form if more space is needed.)

5. By _January 25, 19--_ (date), ... the consultant will send to the project and a copy to TADS a summary
   (2 weeks after Step 4)   report on the visit including recommendations for follow-up activities.

6. By _January 25, 19--_ (date), ... the designated staff will send TADS a completed Evaluation of Consulta-
   (2 weeks after Step 4)   tion report form.

NOTE: Since these steps represent the minimal preparation and follow-up activities, you are encouraged to build in other activities that will help both you and TADS to address the need and objective. Please use the below space and the reverse of this page. Be sure to date the activity and fit it into the sequence above by re-numbering the steps.

Step _____ : By _____

VIII.   RECOMMENDATIONS, QUALIFICATIONS, AND OTHER INFORMATION: Please list below any specific qualifications the consultant should have and/or requested consultants for this activity.

The consultant should have experience in administering adapting, and in-
terpreting the Uzgiris and Hunt Scales for very young at-risk and
or mildly to moderately handicapped infants.

By inserting a date for completion of the Technical Assistance, the project can establish the timelines for preparatory and follow-up activities. The amount of TA (number of consultation days or visits) proposed to meet the need is also included. Finally, the project and needs assessor are requested either to recommend persons or describe qualifications which they feel the TA provider should consider in potential consultants.

For each technical assistance need, a Work Sheet and a Sequence-of-TA-Activities Form are returned to TADS along with the rated Profile and Summary Page. These materials comprise a Tentative Technical Assistance Agreement.

Developing the Memorandum of Agreement

At TADS, a coordinator receives the tentative agreements and initiates a ratification process:

1. Work Sheets and the Summary Page are reviewed to ensure that the statements capture the needs identified by the Profile; and

2. costs are estimated so the agreement stays within the allocated financial resources.

The coordinator acts as an advocate for the project and negotiates necessary changes. Frequently, ways of meeting needs are found that stretch resources, such as combining consultations or altering a delivery method.

During ratification, potential consultants are identified and contacted to ascertain their availability. Based on the ratification-process discussions, a draft Memorandum of Agreement is prepared. It is signed by the person at TADS with administrative responsibility for technical assistance to demonstration projects. Two signed copies are sent to the project. The project's director signs and returns that copy -- if the agreement is accurate -- to TADS. While not a legal contract, the Memorandum of Agreement between TADS and the project is the basis for delivering services in which the roles

and responsibilities of both parties are clearly delineated.

EVALUATION OF THE PROCEDURES

TADS has employed various ways of gathering information to evaluate its
needs assessment procedures. Routine evaluative procedures have been conducted
with each needs assessment. Anecdotal reports have been gathered from clients
and needs assessors. And, more recently, two special studies have been under-
taken.

Routine Procedures and Anecdotal Reports

The client and, in the case of on-site visits, the needs assessor
routinely complete separate evaluation questionnaires and return them to TADS
after an assessment. The questionnaires ask questions about the quality
and usefulness of the materials and procedures, the extent to which stated
criteria were met, and the degree of client satisfaction. Clients rate the
performance of their needs assessor, and the needs assessors rate the
readiness and receptivity of the projects. The questionnaires also provide
opportunities for more open-ended comments, suggestions, and criticisms.
When the information from all questionnaires for a given year is compiled,
it provides a measure of how successful the needs assessments were for that
year and whether or not changes in procedures are needed. Figure 18 shows
the basic questionnaire. It is sent -- as shown -- to projects conducting
self-assessments. Figure 19 shows the sections added to the questionnaire
when it is sent to needs assessors. Figure 20 shows the section added to
the questionnaire when it is sent to projects having on-site assessments.

In addition to the routine questionnaires, reports by needs assessors
of their experiences and feedback from client programs (often unsolicited)
provide a wealth of information on what makes the process work. These

FIGURE 18
Basic Questionnaire
(Self-Assessment)

City, State _____

Project ID _____

Dates of Needs Assessment_____

Needs Assessor _____

Type of Needs Assessment___Self_____

TECHNICAL ASSISTANCE DEVELOPMENT SYSTEM

PROJECT EVALUATION OF NEEDS ASSESSMENT

This questionnaire is designed to gather information regarding the TADS' needs assessment conducted with your project. The items are designed to provide TADS with information regarding the needs assessment procedure and your opinions regarding its quality and usefulness. The information provided by all projects will be used to determine the effectiveness of our needs assessments. YOUR RESPONSES TO ITEMS WILL REMAIN STRICTLY CONFIDENTIAL and will be reported only in combination with information gathered from other projects. We would appreciate your most honest and objective opinions. THANK YOU.

I. THE NEEDS ASSESSMENT: Listed below is a set of statements of criteria for a TADS' needs assessment. Please rate the extent to which you believe the needs assessment of your project met the stated criteria by circling the appropriate number. For question 6, please follow the instructions given with the item.

	Not Met		Met Partially		Met Completely	Exceeded Stated Criterion
1. The needs assessment provided a comprehensive review of the project.	1	2	3	4	5	6
2. The needs of the project, those requiring and not requiring technical assistance, were identified.	1	2	3	4	5	6
3. A list of clearly specified needs to be addressed by technical assistance was developed.	1	2	3	4	5	6
4. Technical assistance activities for the needs described in item 3 above were identified.	1	2	3	4	5	6
5. Roles and responsibilities for the project staff and TADS in planning and carrying out technical assistance were clarified.	1	2	3	4	5	6

6. In addition to these criteria, were there other accomplishments of the needs assessment process? (please check)   _____ Yes   _____ No

If yes, please describe: _____

_____

_____

_____

II. THE NEEDS ASSESSMENT MANUAL: Please rate the quality of the needs assessment manual by circling the appropriate number for each of the following items. Place any comments you may have regarding the manual in the section labeled "comments."

	Unsatis-factory	Below Average	Average	Good	Excel-lent	Excep-tional
1. Clarity, i.e., extent to which contents are clear, understandable, etc.	1	2	3	4	5	6
2. Completeness, i.e., extent to which information needed to complete the needs assessment is included, etc.	1	2	3	4	5	6

FIGURE 18 (cont.') -- Basic Questionnaire (Self-Assessment)

		Not at All		Some-what		Rather Completely	Precisely
3.	Format, i.e., extent to which organization, format of the manual makes it easy to use, etc.	1	2	3	4	5	6
4.	Usefulness, i.e., extent to which the contents of the manual are of use in planning and participating in the needs assessment.	1	2	3	4	5	6
5.	Quality, i.e., overall quality including freedom from errors and misleading information, writing style, etc.	1	2	3	4	5	6
6.	To what extent were the procedures outlined in the manual followed during your needs assessment?	1	2	3	4	5	6

7. Comments: _____

_____

_____

_____

_____

_____

III. THE OVERALL NEEDS ASSESSMENT PROCESS: Please rate the total needs assessment process by circling your response to each of the following items. Please answer the questions and provide comments, where appropriate, in the "General Comments" section. Please note in your comments any particular strengths or weaknesses of the process.

		Unsatis-factory	Below Average	Average	Good	Excel-lent	Excep-tional
A.	**Satisfaction with Needs Assessment**						
1.	Extent to which the needs assessment experience met your staff's expectations.	1	2	3	4	5	6
2.	The usefulness/applicability of the needs assessment to your project.	1	2	3	4	5	6
3.	The quality of the overall needs assessment process.	1	2	3	4	5	6
4.	Your overall satisfaction with the total needs assessment experience.	1	2	3	4	5	6

B. General Comments: _____

_____

_____

_____

_____

_____

TADS, UNC-Chapel Hill, 1981   THANK YOU.

FIGURE 19
Additions to Basic Questionnaire for Needs Assessors

Project ID _____

Project Location _____

Dates of Needs Assessment ___-___

Needs Assessor _____

TECHNICAL ASSISTANCE DEVELOPMENT SYSTEM

NEEDS ASSESSOR EVALUATION OF ON-SITE

NEEDS ASSESSMENTS

PURPOSE: This questionnaire is designed to gather information regarding the TADS' needs assessment you recently conducted with the project listed above. The information that you provide will be combined with that of other needs assessors to determine the effectiveness of our efforts. We would appreciate your most honest and objective opinions. THANK YOU.

I. TIME EXPENDED: Please provide the information requested in each blank.

1. How much time did you spend on the needs assessment?

Hours

_____ in preparation

_____ on-site conducting the needs assessment

_____ in follow-up

_____ in travel

IV. THE PROJECT: Please rate the following characteristics of the project by circling the response which reflects your opinion of the extent to which the characteristic was evident.

	Not Evident		Somewhat Evident		Quite Evident	Pervasive
1. Understanding of the needs assessment process, i.e., familiarity with TADS and the purpose of the needs assessment, familiarity with needs assessment materials, the activities comprising the process, etc.	1	2	3	4	5	6
2. Preparedness, i.e., all needed staff in attendance, calendars cleared, necessary materials at hand, all appropriate staff oriented to needs assessment procedures, etc.	1	2	3	4	5	6
3. Openness, i.e., willingness to share information, willingness to consider new ideas, etc.	1	2	3	4	5	6
4. Leadership Support, i.e., provision of adequate resources, facilities, etc., support of the needs assessment, involvement in the needs assessment, etc.	1	2	3	4	5	6

5. Comments: _____
_____
_____
_____

V. General Comments: Please list here any comments that you wish to make regarding the needs assessment. Please note in your comments any particular strengths or weaknesses of the process.

_____
_____

FIGURE 20
Additions to Basic Questionnaire for On-Site Assessments

City, State _____

Project ID _____

Dates of Needs Assessment _____

Needs Assessor _____

Type of Needs Assessment __On-site__

TECHNICAL ASSISTANCE DEVELOPMENT SYSTEM

PROJECT EVALUATION OF NEEDS ASSESSMENT

This questionnaire is designed to gather information regarding the TADS' needs assessment conducted with your project. The items are designed to provide TADS with information regarding the needs assessment procedure and your opinions regarding its quality and usefulness. The information provided by all projects will be used to determine the effectiveness of our needs assessments. YOUR RESPONSES TO ITEMS WILL REMAIN STRICTLY CONFIDENTIAL and will be reported only in combination with information gathered from other projects. We would appreciate your most honest and objective opinions. THANK YOU.

III. THE NEEDS ASSESSOR: Please rate the following characteristics of the needs assessor by circling your response on each of the following items. Place any comments regarding the needs assessor in the section labeled "Comments."

	Unsatis-factory	Below Average	Average	Good	Excel-lent	Excep-tional
1. Preparedness, i.e., familiarity with the project's proposal and other relevant materials sent to him/her, familiarity with the Needs Assessment process and materials, etc.	1	2	3	4	5	6
2. Expertise, i.e., knowledge of HCEEP project operation, ability to assist in the identification of needs, etc.	1	2	3	4	5	6
3. Organization/Management Skills, i.e., leadership ability, attention to task, summarization skills; priority setting skills, etc.	1	2	3	4	5	6
4. Flexibility, i.e., ability to adjust schedules, focus, etc. to meet project needs, etc.	1	2	3	4	5	6
5. Interpersonal Skills, i.e., ability to relate well to the staff, supportiveness, open, non-threatening approach, etc.	1	2	3	4	5	6

6. Comments: _____

_____

_____

_____

reports often describe how the process contributed to the development
of the client's program beyond the identification of technical assistance
needs.

TADS staff members also provide information that is used to refine the
TA needs assessment. They not only have conducted many needs assessments,
they have implemented hundreds of individual TA plans based upon the results
of needs assessments. Over the years, their feedback has improved the process
of pinpointing needs, setting priorities, and developing realistic
expectations for TA during the assessment process.

Special Studies

In 1979-80, TADS conducted special studies that contributed significantly
to the understanding and refinement of TA needs assessments: two yearlong
case studies of TADS work with selected client programs and an extensive
evaluation of three TA needs assessment methods.

Two case studies. The two case studies involved a third-party observer's
presence at each client's major TA events during the year. The observers
documented in detail the entire on-site needs assessment process (Behr,
Hawes, Vandiviere, Suarez, 1981). They also reported both short- and long-
term results of the assessment process on the two client programs. Most results
were positive; a few were not.

Perceptions contained in the case studies tend to support our own
experience and data. For example, both case studies cited several
changes in project operations as a result of the needs assessment, such as
improving communications, increasing administrative support, and resolving
organizational conflicts. Also, impressions and attitudes shaped during
the needs assessment seem to persist for the clients. A negative experience
during one project's needs assessment colored the director's relationship

with TADS for the entire year. More information concerning the 1979-80 case studies is available from TADS, and both case studies are continuing through 1980-81 and 1981-82.

Assessment strategies. The most ambitious effort by TADS to date in refining and evaluating its needs assessment procedures was a yearlong study comparing three-different needs assessment strategies (Suarez and Cox, 1981). The three strategies were: (1) on-site visits -- conducted by a trained needs assessor at the client program's site, (2) telephone assessments -- conducted by a trained needs assessor through a series of telephone conversations, and (3) self-administered assessments -- conducted by the client program's staff using written procedures and materials provided by TADS.

The motivation for conducting this study was, in part, economic. Obviously, if the telephone and self-assessment strategies produced results comparable to the established on-site strategy, then these less expensive strategies could be used in conducting future assessments. Beyond the economic considerations were the questions: "Can telephone and self-assessment strategies really produce a valid TA needs assessment?" and "In what ways, if any, do the three strategies differ, besides cost?"

Each of sixty-four client programs was assigned one of the three needs assessment strategies using a stratified random-selection process. First-, second-, and third-year projects were equally represented in the evaluation of each strategy.

Data were collected in order to compare the strategies in four areas:

1. Integrity -- Were the strategies comparable in terms of meeting the established criteria for a valid needs assessment? Did they reveal similar "needs"? Was the stability of those needs comparable over time? Did the strategies equally promote "additional

accomplishments" during the needs assessment?

2. <u>Participant perception</u> -- Were there any differences in the level of satisfaction of client programs and needs assessors?

3. <u>Time and effort</u> -- Did the strategies differ in the amount of time and effort given by the client staff involved, the TA coordinators, and the needs assessors? Did the strategies differ in the number of days that the needs assessment took?

4. <u>Technical Assistance</u> -- Did the strategies equally lead to the technical assistance that helps clients meet their needs, keeps clients satisfied with services, and has a generally favorable impact on the client?

The results indicated that all three strategies identified technical assistance needs and were similar on most variables. Participants occasionally favored "on-site" over "telephone." They also suggested that while the strategies were comparable in identifying TA needs, there were some qualitative differences.

Based on the results of this study, TADS has discontinued general use of the telephone strategy. "On-site" assessment is now used with all first-year clients and self-assessment with second- and third-year projects, unless the client requests an on-site visit. A full report on this study, <u>An Input Evaluation of Three Technical Assistance Needs Assessment Strategies</u> (Suarez and Cox, 1981), is available from TADS.

CONCLUSIONS

TADS philosophically is committed to responsive, rather than directive, technical assistance. Our approach is structured and comprehensive. See

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+--------------------------------------------------+
|                    FIGURE 21                     |
|              A Needs Assessment Matrix           |
|                                                  |
|                     Structured                   |
|                     Procedure                    |
|                         ▲                         |
|                         |                         |
|                    TADS                          |
|                    NEEDS ASSESSMENT              |
|                         |                         |
|   Directive  ◄──────────┼──────────►  Responsive |
|   TA Provider           |              TA Provider|
|                         |                         |
|                         |                         |
|                         |                         |
|                         ▼                         |
|                   Unstructured                   |
|                     Procedure                     |
+--------------------------------------------------+
```
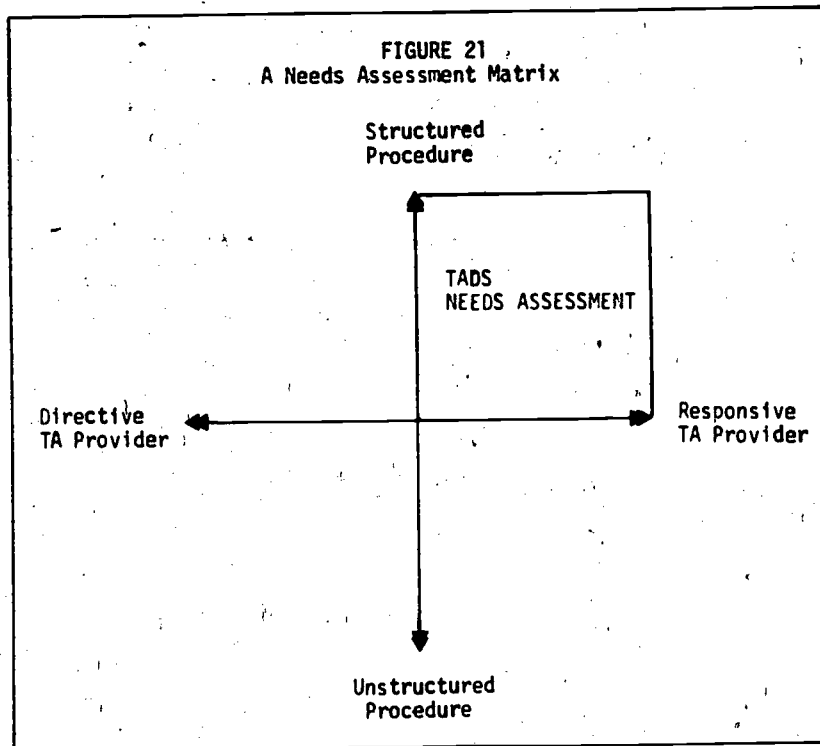
Figure 21. All the factors identified in our evaluation as contributing

to successful needs assessments are products of this philosophical approach.

For example: TADS provides structure by thoroughly training needs assessors

in the process of assessment and familiarizing them with the clients' mission

and scope; by suggesting preparatory activities for the client; and by

developing materials with which to review programs (thereby minimizing biases

of both client and needs assessor). We try to be responsive by acknowledging

the stage of organizational development of the client; by matching needs

assessor (in terms of background and skills) with the client; and, by using

a process which allows the client to determine where progress is desired <u>and</u>

if technical assistance is needed to achieve that progress.

The needs assessment procedures which have evolved over the past ten years are not static. They are subject to the same forces which produced them: a responsive philosophical stance and a desire for structure in procedures. We believe that these two forces have created a positive and effective means of assessing, and then addressing, our clients' needs.

45

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