1. Prepare to assess

**Importance**

The impact of mastering these competencies is that you:

- Focus on the needs of the participants and your client, and avoid a “knee-jerk” response to requests for a learning solution.
- Plan for an efficient and effective assessment of performance needs.
- Start building a partnership with your client.

### Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

#### 1a Clarify the client perspective

- Explore what the client thinks is actually happening versus what should be happening
- Identify changes the client wants to see (for example, desired performance outcomes, behavior, values, attitudes)
- Determine measurable business results from the program
- Identify stakeholders who will influence the project, along with their roles and perspectives
- Identify organizational realities and environmental factors that the client is facing
- Confer with your client on recent political and social developments in the area and their possible impacts on the program and the safety of its participants
- Determine how the client will make decisions about recommended solutions
- Address any client requests or concerns that could detract from a successful needs assessment

#### 1b Gather initial information

- Determine the extent to which other stakeholders share the client’s perspective
- Survey existing and past programs conducted in this or similar regions
- Determine availability and quality of local advisory services
- Map the ecosystem of programs in your region that target women or focus on gender inclusion
- Determine the sophistication of the private business culture in the region
- Identify the impact the business need has on resources available to develop the curriculum
- Compare stakeholder and client insights on recent political and social developments in the area and their possible impacts on the program
- Assess transportation options for program providers and participants and determine mobility constraints
- Examine local social views and belief systems
- Identify religious traditions and norms that a program must observe or accommodate
- Determine implications of using a male or a female facilitator
- Determine how women’s legal status might impact the program
- Identify factors and constraints for care providers
Establish baseline economic data on participants
Identify any economic issues that might interfere with program attendance or completion:
  > Determine affordability of your program for your client and participants
  > Identify the effect of a fluctuating exchange rate on program fees for the participant and program providers
Confirm that the desired performance has the potential to affect business results
Determine risk involved in implementing a proposed solution without conducting a needs assessment

1c Plan needs assessment
Determine resources, time, and budget available and develop a project plan for the needs assessment
Define the target audience for the program
Determine particular constraints that might affect the needs assessment (for example, disruptions due to political unrest, safety or gender equality issues)
Determine data required to identify causes of performance gaps and potential solutions
Determine the most efficient, effective, and ethical methods for collecting data required
Determine who should participate in providing data through focus groups, interviews and other data assessment techniques
Plan sample size and distribution to collect valid and reliable data

Key outputs and assessment criteria
Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

<table>
<thead>
<tr>
<th>KEY OUTPUTS</th>
<th>ASSESSMENT CRITERIA</th>
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<tbody>
<tr>
<td>Plan for assessing performance needs</td>
<td>Plan includes rationale for assessing performance needs, resources required, budget, target audience to be studied, data required, rationale for data collection method(s), who should provide data, sample size, and distribution of data</td>
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<td></td>
<td>Plan includes comprehensive list of activities and timing, with clear roles and responsibilities plus approvals needed, as well as communication to stakeholders</td>
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<td>Plan provides guidelines on how to collect information in accordance with regional norms</td>
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<td></td>
<td>Plan describes proposed content of the needs assessment report</td>
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<td>Plan addresses needs and concerns of client and other stakeholders</td>
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<td>Plan is approved by client</td>
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