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.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan for assessing performance needs	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
	Plan includes comprehensive list of activities and timing, with clear roles and responsibilities plus approvals needed, as well as communication to stakeholders
	Plan provides guidelines on how to collect information in accordance with regional norms
	Plan describes proposed content of the needs assessment report
	Plan addresses needs and concerns of client and other stakeholders
	Plan is approved by client