**WORKSHEETS FROM**

**Using Needs Assessments   
for School and District Improvement**

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WORKSHEET 1

## Planning Your Needs Assessment (NA)

1. Purpose statement for your NA:

**The purpose of this NA is to** ...

1. What will you call the NA?

**The NA will be called** ...

1. Who will develop the NA (i.e., SEA, LEA, external partner, or combination)?

**The NA will be developed by** ...

1. Will the NA be comprehensive or segmented?

**If a CNA, which SEA departments or areas of school operations are included?**

**If an SNA, what are the separate NAs or the CNA components that will be administered separately?**

**When will they be administered? Which departments will administer them?**

1. Will the same NA tools be used for all schools, or will different versions be used for different types of schools? If the latter, which types (e.g., high school, middle school, elementary school, CSI, TSI, alternative schools) will require different tools?
2. How does the capacity of the school and LEA inform the NA tools and/or processes?

Worksheet 2

## Designing Your Needs Assessment (NA) (Part 1)

Which data collection methods do you anticipate including in your NA?  
Check all that apply.

* Compilation of data from available sources

\_\_\_ SEA

\_\_\_ LEA

\_\_\_ school

\_\_\_ external partner

* Consensus compilation by school-based team
* Guided compilation by school-based team, with LEA, SEA, or external-partner facilitation
* Surveys or questionnaires

\_\_\_ paper and pencil

\_\_\_ scannable

\_\_\_ online

* Interviews

\_\_\_ phone call

\_\_\_ face to face

* Focus groups

\_\_\_ conference call

\_\_\_ face to face

* Onsite review by team

\_\_\_ external (SEA/partner)

\_\_\_ internal (LEA/school)

\_\_\_ hybrid

Worksheet 3

## Designing Your Needs Assessment (NA) (Part 2)

Which elements of an NA do you anticipate including? Check all that apply.

* Contextual variables

\_\_\_ demographics

\_\_\_ student

\_\_\_ community

\_\_\_ personnel

\_\_\_ other:

\_\_\_ LEA policies and supports

\_\_\_ operations

\_\_\_ learning infrastructure

\_\_\_ support for school improvement

* Student variables

\_\_\_ student outcomes/ performance

\_\_\_ assessments

\_\_\_ graduation rates

\_\_\_ postsecondary success

\_\_\_ accountability metrics

\_\_\_ other:

\_\_\_ student engagement

\_\_\_ attendance

\_\_\_ behavior

\_\_\_ other:

\_\_\_ student opportunities

\_\_\_ enrollment/ participation in various programs

\_\_\_ curricular areas

\_\_\_ equity of access to quality instruction

\_\_\_ other:

* Personnel policy and procedures (may be LEA) (e.g., recruitment, hiring, placement, development, evaluation, differentiation, advancement, termination)
* Professional practice (e.g., leadership and decision‑making; leadership development; planning, curriculum and instruction; family/community engagement; student support services)
* Climate and culture (e.g., student and adult [including parent] perceptions; stakeholder engagement)
* Vendor/partner practices and outcomes (e.g., do contracts include performance management provisions?)

Worksheet 4

## Designing Your Needs Assessment (NA) (Part 3)

Check off the roles and responsibilities for each of the stakeholder groups identified:

| **Stakeholder Group** | **Establishment of Design Requirements** | **Development of Tools and Processes** | **Data Collection** | **Analysis** | **Onsite Review** | **Plan Development** |
| --- | --- | --- | --- | --- | --- | --- |
| SEA Personnel |  |  |  |  |  |  |
| LEA Personnel |  |  |  |  |  |  |
| Local Board of Education |  |  |  |  |  |  |
| Families and Community |  |  |  |  |  |  |
| School Personnel |  |  |  |  |  |  |
| Students |  |  |  |  |  |  |
| SEA-Hired External Partners |  |  |  |  |  |  |
| LEA-Hired External Partners |  |  |  |  |  |  |
| Other: |  |  |  |  |  |  |

Worksheet 5

## Outlining Your Improvement Process

1. Will you work with a framework of effective practice? If so, which one(s)? (You may incorporate portions of more than one.)
2. How does the needs assessment (NA) fit into your overall theory of action for improvement?
3. How do the results from the NA inform the creation of a plan?
4. How do the results from the NA inform immediate next steps for the school, the LEA, and the SEA?
5. How do the monitoring processes (by the school, LEA, and/or SEA) connect back to the NA?
6. How do the results from the monitoring processes inform future NAs and subsequent improvement plans?

Worksheet 6

## Designing an Effective Onsite Review Process

1. Who participates in the onsite review process?
2. Who facilitates the onsite review process?
3. What data analysis should be completed in preparation for the onsite review process?
4. How can the onsite review process be a safe space to discuss issues that may be controversial or politically sensitive?
5. How can the onsite review process be structured to complete root-cause analysis (e.g., fishbone diagrams; five whys)?
6. How do the results from the onsite review process inform creation of improvement plans for the school and/or the LEA?