Needs Assessment and Program Development

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Presented by Julie Coates

This webinar has been co-sponsored by the Quebec Association for Lifelong Learning and the CLC Initiative.
To learn more about what's happening in lifelong learning in Quebec, visit QALL' Web Portal at http://www.qall.ca/
To learn more about CLCs, please watch our video at http://www.youtube.com/watch?v=A235KXOGiQ8

Information that works

A private, non-profit international association serving providers of lifelong learning and continuing education
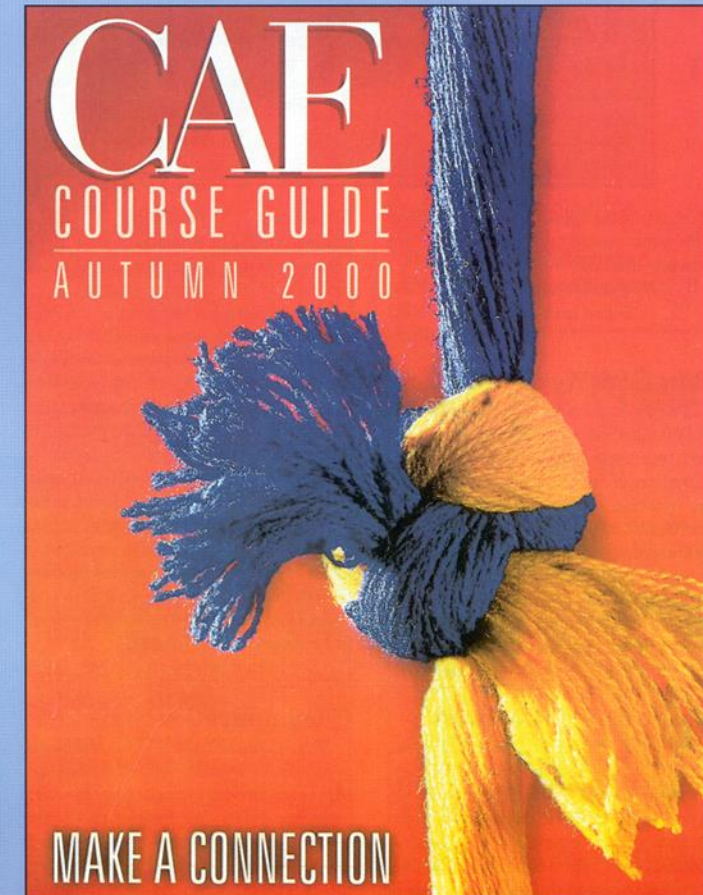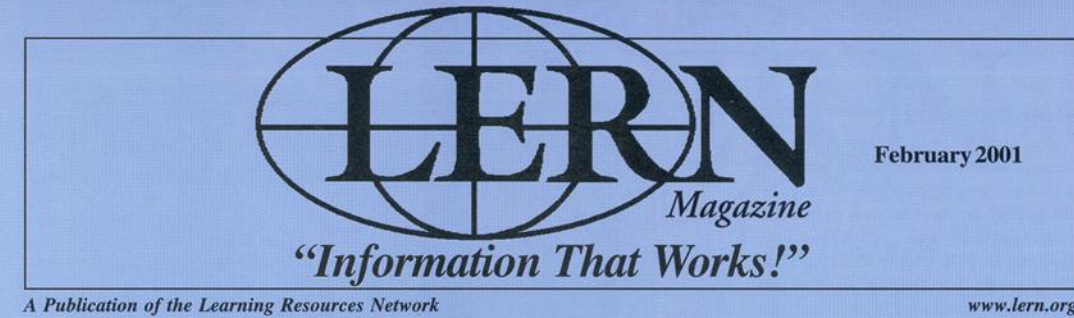
- Every day you and your staff can get answers to tough questions online in the LERN Club.

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  - Up to six staff members receive benefits
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  - Free consulting via phone, mail, fax or e-mail
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  LERN provides benchmarks, averages, and ratios for success.
  LERN provides the top consultants in the business.

LERN Magazine
"Information That Works!"
A Publication of the Learning Resources Network
February 2001
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MAKE A CONNECTION

Best Marketing Ideas for 2001
Plus...
- The Most Valuable Image Makers
- Predicting Registrations
- Drucker and Innovation
- And more...

Today's Presenter: Julie Coates

- Member of the LERN team since 1976
- Data Analysis & Technical Support
- Newsletter writer and editor
- Pedagogy of the 21st Century
- Generational Learning Styles

Understanding Participants
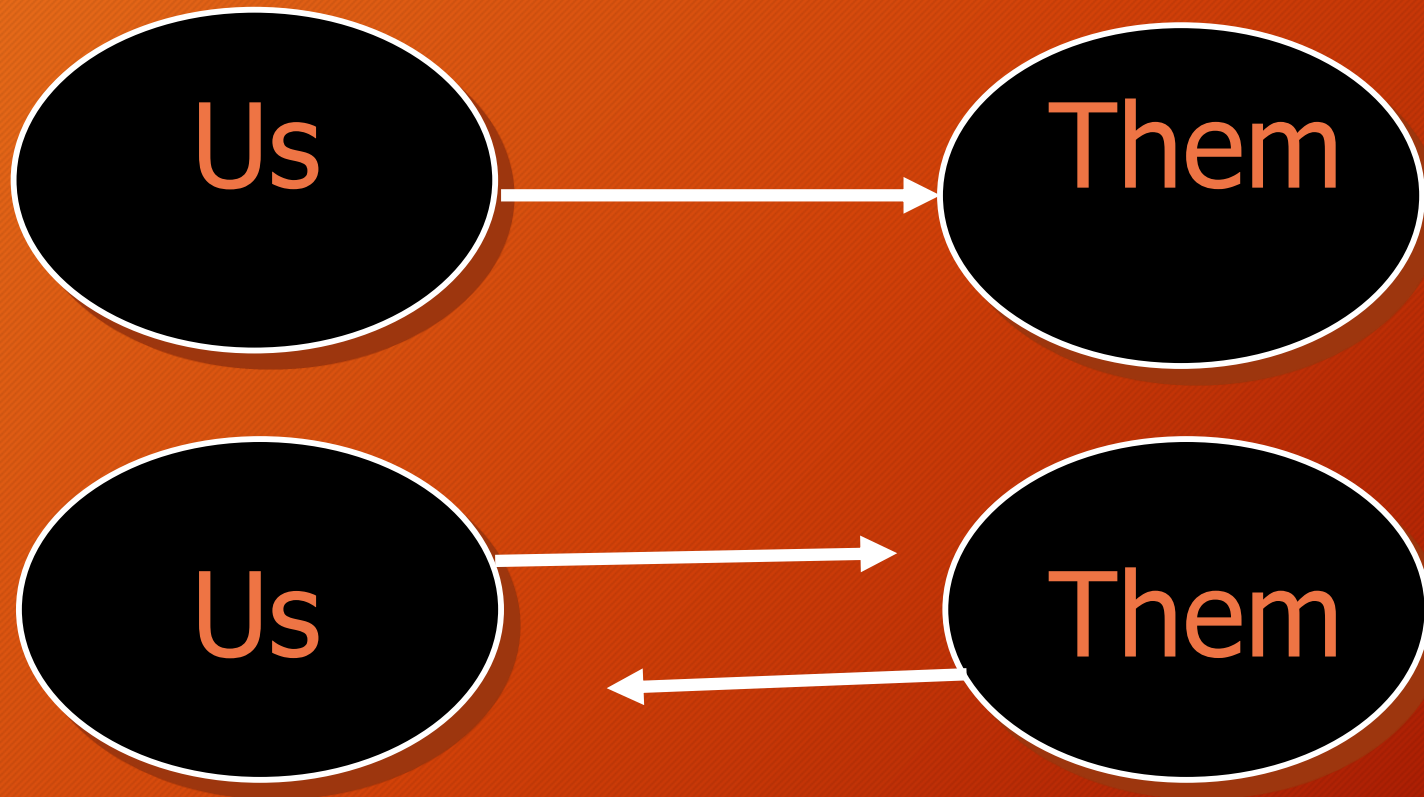
Shift: from products to customers

Old World

Product → Promotion → People

New World

People → Product → Promotion

We no longer manage products, we manage customers

6 Characteristics of adult learners

- Adults are autonomous and self-directed
- Adults have accumulated life experiences and knowledge
- Adults are goal-driven
- Adults want material relevant to their needs and goals
- Adults are practical
- Adults require respect

Other factors that influence learning

- Adults come with a pre-disposition to learning in general

- Adults come with a pre-disposition to the content

- Beliefs
- Opinions
- Attitudes
- Knowledge
- Expectations
- Status
- Social background
- Culture
- Physical body
- Religion
- Family of origin experience
- Values

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Learning as a child - Learning as an adult

	Children	Adults
Readiness to learn	determined by developmental stage	determined by present roles and problems
Application of learning	in the future	immediate
Control of learning	directed by others	self-directed
Relevance of learning	quickly learn isolated facts and concepts	resistant to learning non-relevant materials
Barriers to learning	few other responsibilities	learning competes for time and energy; anxiety about learning

Each generation learns differently

- Veterans
- Baby Boomers
- Gen X
- Gen Y

(Millennial Generation)

Competency-based learning

Competency-based learning follows a prescribed learning hierarchy

MASTERY

SKILLED

CAPABLE

KNOWLEDGEABLE

AWARE

Environmental Scanning

Trend watching provides key knowledge

- What your audience will want six months from now
- What your audience will want one year from now
- What your audience will want three years from now

Best places to spot trends

- Models
  - Successful organizations, early adopters
- Gurus
  - People who are 'in the know' in your areas of interest
- All forms of media
- Surveys of your own market

Be unique

What can you do that others can't?

Use environmental scanning processes

- The macro environment
- Industry environments
- Internal environment
- The competitive environment
- The technological environment
- The customer environment
- Social trends
  - Demographic shift, ethnic mix shift, changing economy

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Establish a process

- Generate a list of information sources
- Identify your organization's information needs
- Identify who will participate
- Designate who should monitor what
- Store and disseminate the information
- Maintain an ongoing scanning program
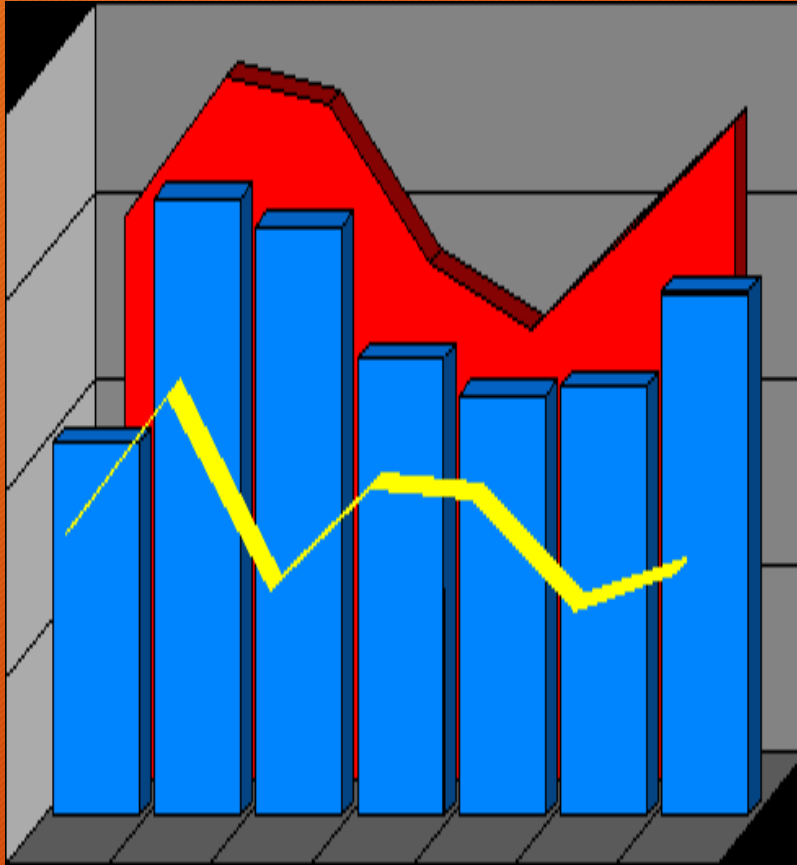
The Macro Environment

- Large social, technological, economic and political changes
  - Energy
  - Water
  - Male Graduates
  - Out-migration
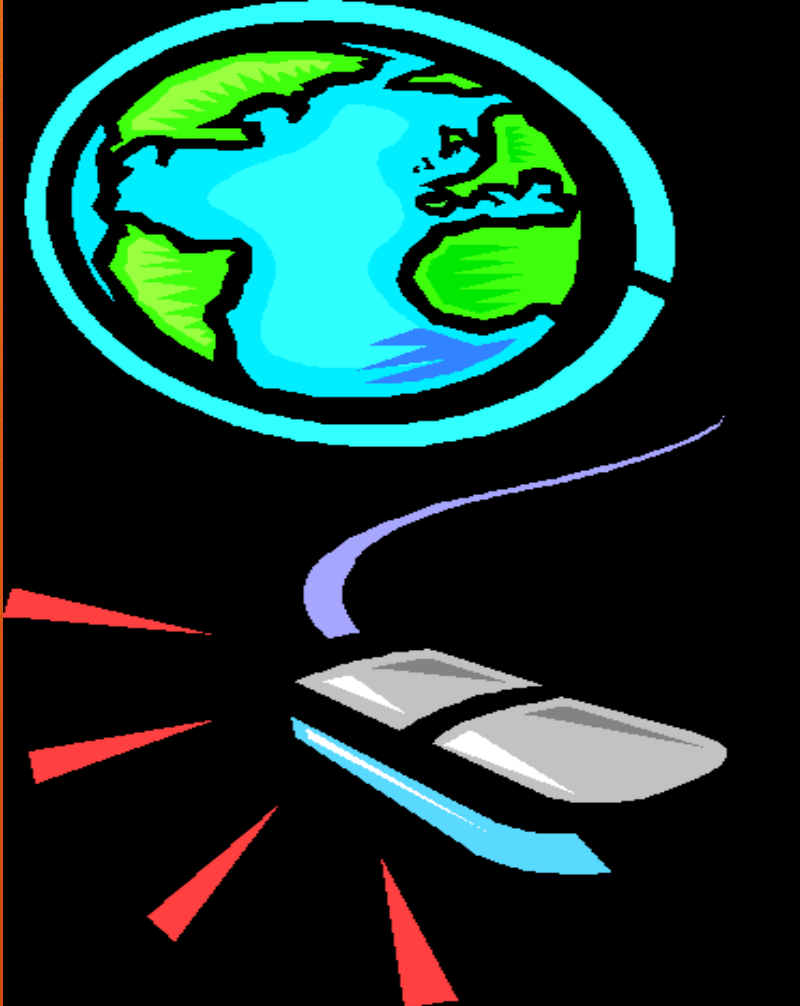 - Loss of manufacturing jobs

The Social Environment
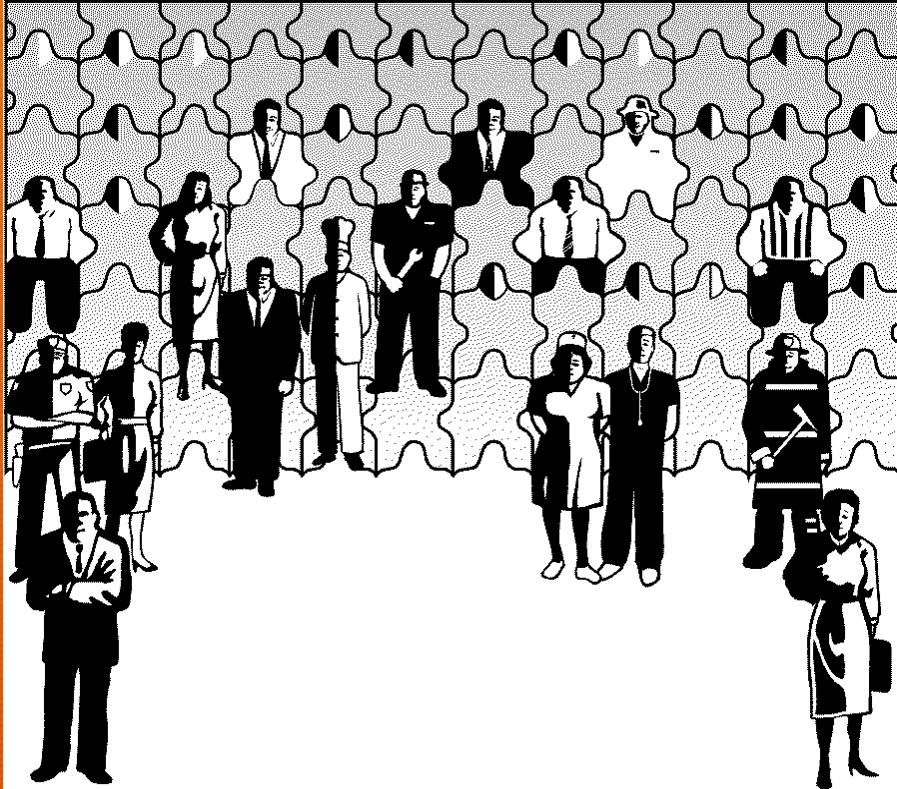
- Demographic shifts
- Aging population in English Community
- Shrinking English-speaking population
- Employment shifts
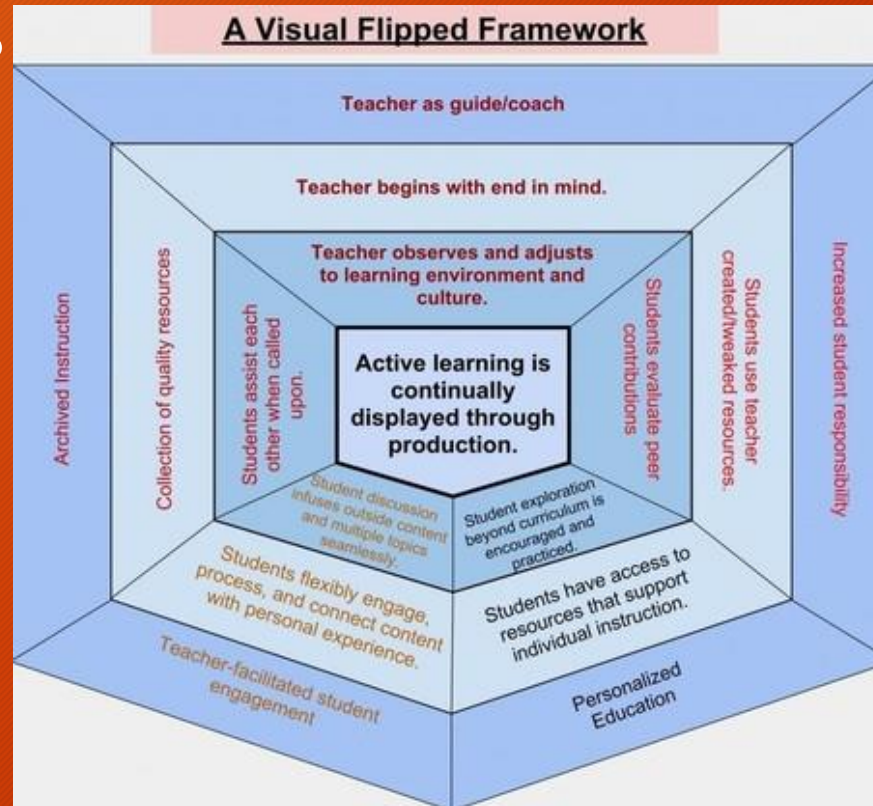
Economic Environment

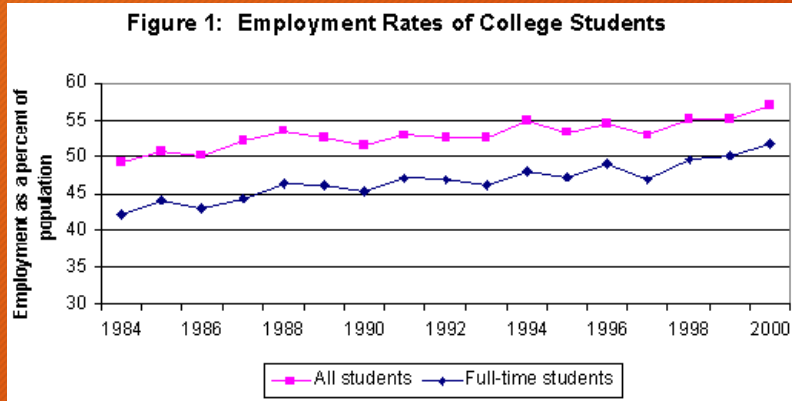Monitor broad trends

Technological Environment

- How we do business
- How we teach and learn
- How we organize our lives, residence, work and leisure
- Smart Phones
- Mobile Marketing

The industry environment

- What are the trends with similar organizations?
- Credit in CE
- Stackable certificates
- Articulation of Credit
- Credit for prior learning

A Visual Flipped Framework

Teacher as guide/coach

Teacher begins with end in mind.

Teacher observes and adjusts to learning environment and culture.

Active learning is continually displayed through production.

Archived Instruction

Collection of quality resources

Students assist each other when called upon.

Students evaluate peer contributions

Students use teacher created/tweaked resources

Increased student responsibility

Student discussion infuses outside content and multiple topics seamlessly.

Student exploration beyond curriculum is encouraged and practiced.

Students flexibly engage, process, and connect content with personal experience.

Students have access to resources that support individual instruction.

Teacher-facilitated student engagement

Personalized Education

The Customer Environment

Figure 1: Employment Rates of College Students

- Stay alert to feedback from customers
- Cancellation rate
- Drop-out rate
- Changes in participant interests
- Changes in customer demographics

The internal Environment

- Financial performance
- Key ratios
- Image and USP

Needs Assessment & Knowing What to Program Next

What is a needs assessment?

- An ongoing process of discovering what your program's participants want in terms of activities and services

- Determine which customers, what activities and how those activities should be offered

What a needs assessment is NOT

- It's not expensive, nor a one-time study
- It's not something you contract out; you and your staff do it
- It's not more work
  - It replaces wasted staff time and its results maximize profits and services

What needs assessment IS

- It involves some or all of your staff in some way

- It does not separate 'needs' from 'wants'

- It understands that the participants or customers know more about their needs than anyone else does

- It costs less than not doing needs assessments

High cost of not doing needs assessments

- You will incur a higher failure rate than is necessary or tolerable

- You will lose audiences

- You will lose future success to your competition

- Programmers should spend 10-20% of their time doing needs assessments
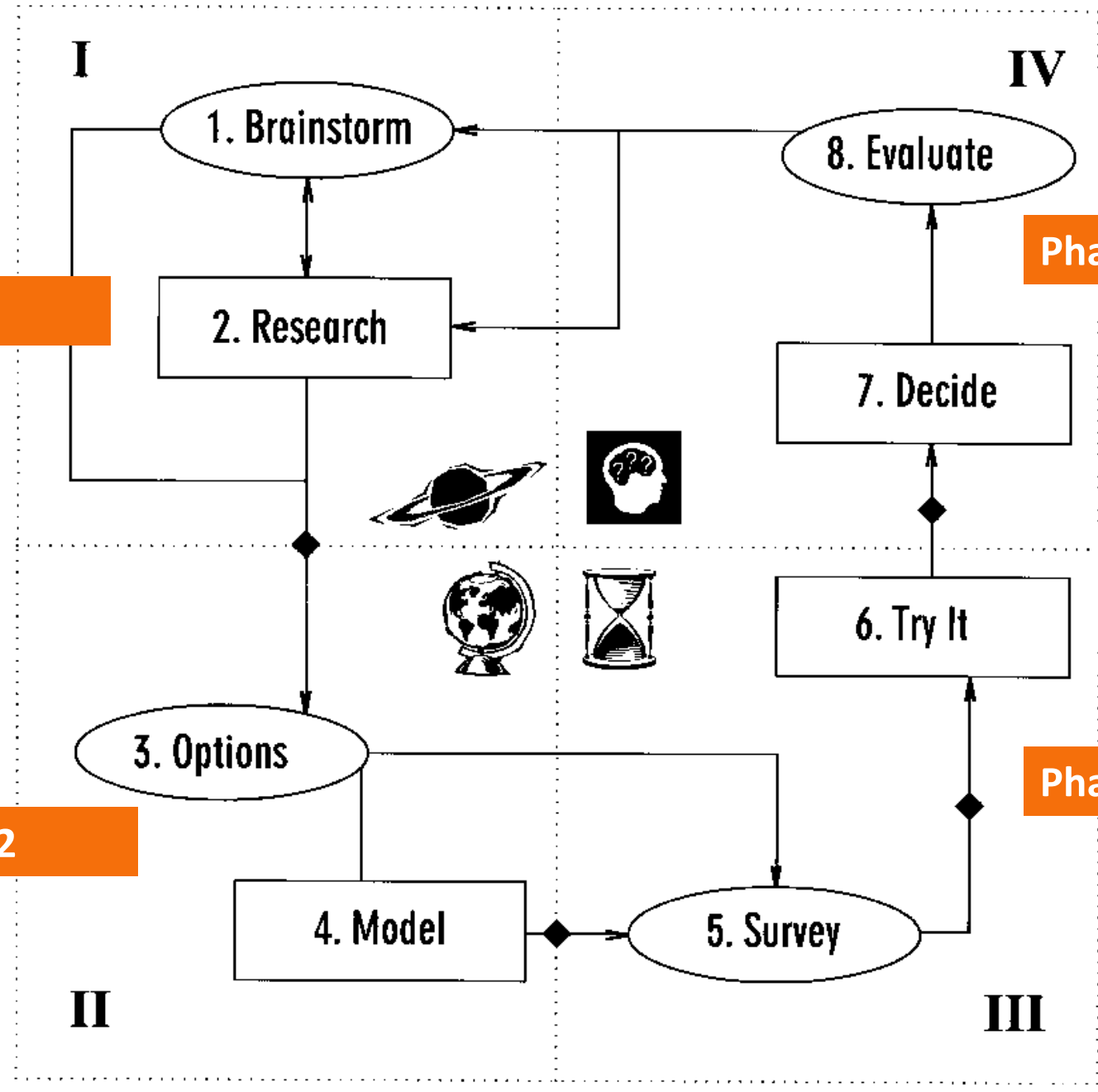
Market potential vs. market share
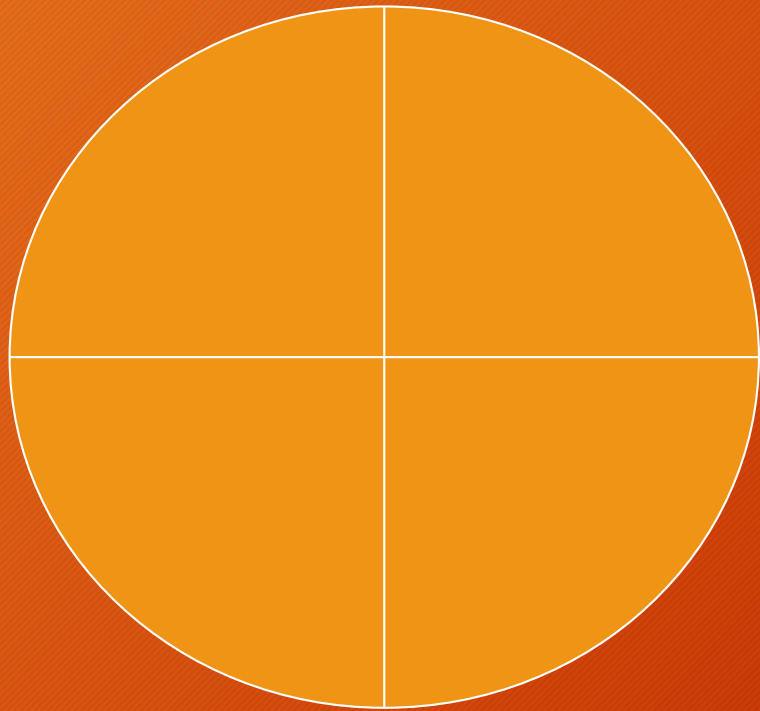
- **Market potential** is the total number of possible participants

- **Market share** is the total number of those people you have enrolled

I

1. Brainstorm

2. Research

IV

8. Evaluate

7. Decide

6. Try It

II

3. Options

4. Model

5. Survey

III

Phase 1

Phase 2

Phase 3

Phase 4

Stage One: Brainstorm

- Use your best participants and teachers
- Brainstorm lots of ideas, keep 10 or more active at any given time
- Don't negate or pass negative judgments on ideas
- All ideas are good—but not all ideas are feasible, workable, or marketable
- Don't give an idea ownership (e.g. Pat's idea)

Rate your new ideas

- Will the offering last 3 years?
- Will the offering generate the same or more than category/subcategory average?
- Will the new offering meet the budgeted operating margin the 3rd time you run it?
- Can you identify the potential participants' names?

Dot voting

Stage Two: Research

- Use low-cost or no-cost techniques to continuously research 10 or more ideas

- Listen to your customers

- Look deep, and in many ways, at your own participation data

- Analyze your three closest competitors

- Explore the total potential audience or "universe" for each new opportunity idea

Stage Three: Choose Options

- Use an advisory board to help you narrow down your best new opportunity ideas

- You control the advisory board, you set the agenda, they help you

- Use your small group to help improve your new opportunity idea

- Survey your small group often to help refine and improve your new opportunity idea

- The advisory group does not make decisions or the final choice for a new opportunity idea. The final decision is made by your audience when you try it.

3 Elements

Audience

Need
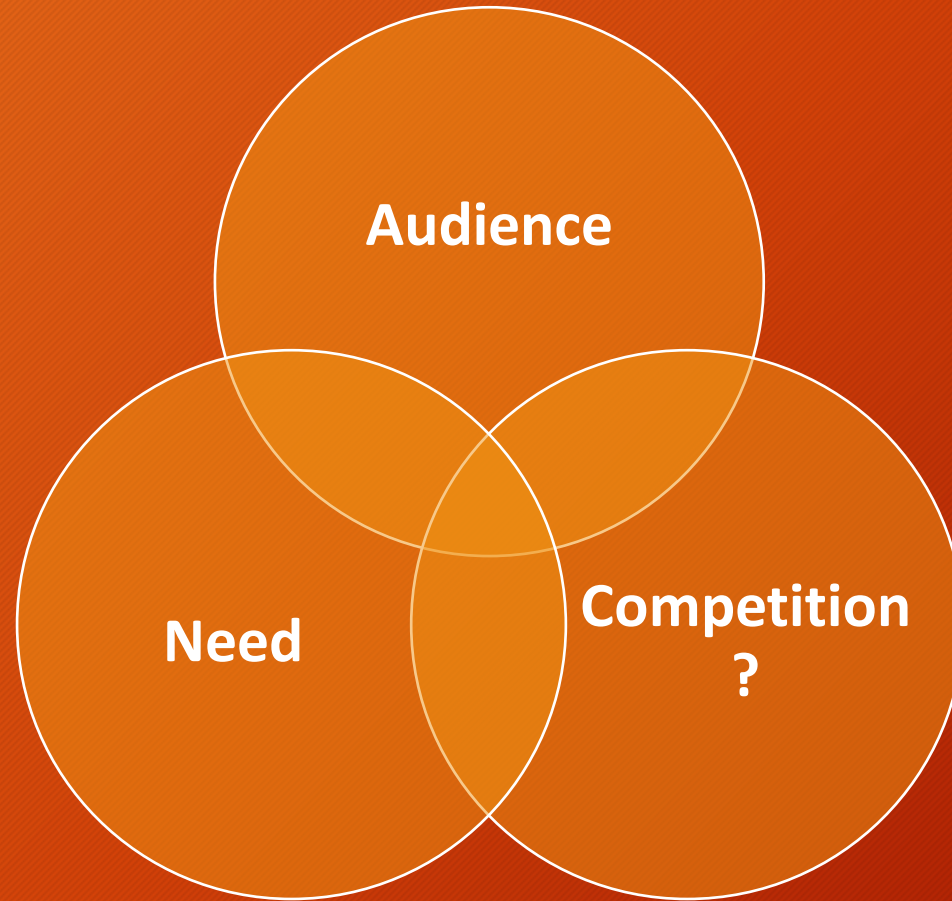
Competition ?

What constitutes a strong potential audience?

- They are currently participating
- 2+ demographic characteristics can be identified
- You have or can get a good mailing list
- There is no competition
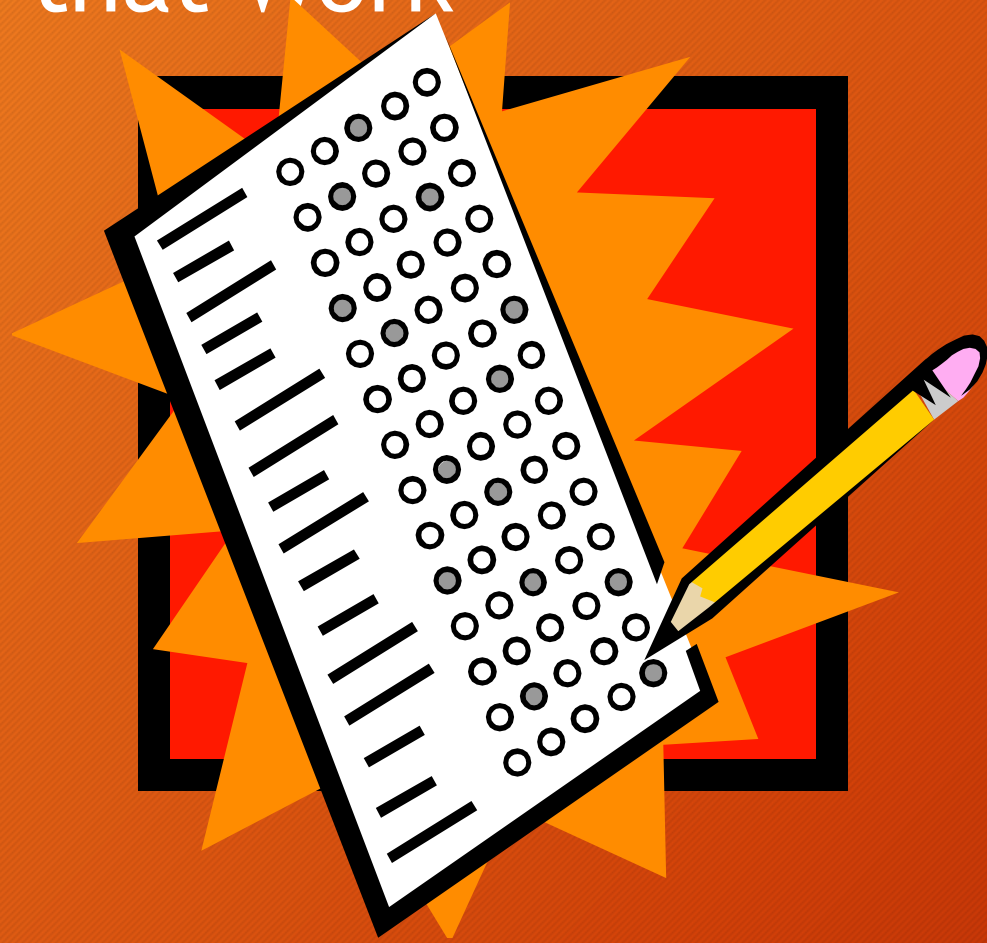
Stage Four: Model

- If your new opportunity idea cannot work on paper, it cannot work in real life
  - This stage is critical
- Do a few "what if" scenarios on a single sheet of paper—nothing fancy

Ask your best customers

- Surveys—6-10/year
- Advisory groups
- At registration
- Focus groups

Creating Surveys that Work

- Short, frequent surveys (6-10/year)
- Limited number of questions (3-5)
- Ask only questions you can use for action

Creating Surveys That Work

- Information you already have
- Information that does not inform action
- Too many questions
- Information you can get elsewhere

Sample Customer Survey

Our School needs your help. We want to understand your needs and interests so that we can plan programs that will meet your needs. Your answers to the questions below will be very important in this effort. The survey will take about 3 minutes to complete. Thank you for helping in our planning process.

1.   Would you participate in the following if they were provided after school?

a.   Practical skills   yes   maybe   no
b.   Sports and leisure   yes   maybe   no
c.   Family activities   yes   maybe   no
d.   Adult training   yes   maybe   no
e.   Health Programs   yes   maybe   no
f.   Other _____

Why would you ask this question? If you simply ask what programs people would like to see, they often indicate that they would "like to see" a lot of things that they will not necessarily attend. If you ask them if they will attend a particular type of program, they are more likely to give you information you can use.

Sample Customer Survey

2. If you are interested in Practical Skills, please list some activities you would be likely to come to:

a.

b.

c.

3. If you are interested in Family activities, please list some activities your family would like to participate in:

a.

b.

c.

4. Do you have other comments about our program or suggestions for activities?

THANK YOU!

What *Not* to ask

- Evaluation questions (What is the quality of our program, how could we improve our program, etc.)
- Demographic questions (how many children do you have?)
- What grade(s) are your children in?
- Have they enrolled in activities previously?

- Open ended questions
- Too many questions
- Questions that may be seen as personal
- Questions you already have answers for.
- Questions that do not give you actionable information.

Read

- Newspaper headlines
- Journals and magazines
- Scan best-seller lists
- LERN newsletters and web site
- Other programs' brochures & web sites

Questions?

For more information
contact
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