Needs Assessment Procedure

I. Introduction

For new shared decision-making initiatives, the first step in integrating decision support into clinical care is doing a needs assessment.

- "A need is a gap between what is and what should be."¹
- A decision-making needs assessment focuses on identifying:
  - What a patient population needs to make better decisions
  - What a practitioner population needs to improve the support they provide to patients during decision making
- A needs assessment can help identify:
  - What groups want or need
  - Whether existing programs or interventions are meeting the needs of those who are supposed to benefit
  - Which groups need services
  - What might be the best alternatives for meeting those needs
- If the goal is to implement the use of an existing decision aid, the needs assessment will be less important in identifying needs. Its main purpose will be to achieve buy-in of participants by reviewing the planned implementation and reviewing the content of the decision aid.

II. Process

A. Define the goal(s) of the initiative.
   - From clinician's perspective
   - From SDM perspective

B. Define the population appropriate for assessment
   - Practitioners
   - Patients

C. Define the scope of the needs assessment
   - How many practitioners?
   - How many patients?

D. Define the method(s)
   Format

- electronic  
  - emailed  
  - Web-based  
- Mailed out  
  - paper  
- Personal interviews  
- Phone interviews  
- Focus groups

E. Define the assessment as either decision-specific or open-ended, then revise the generic needs assessments for the new initiative accordingly.

F. Identify and train personnel to perform needs assessments.
   - Role-play Needs Assessment script to practice interviewing technique and refine wording of questions.
   - Other training will be based on methods chosen in II. D.

G. Identify personnel to provide support for the assessment
   - Scheduling interviews
   - Generating mailing lists and mail merge processes
   - Other administrative and secretarial functions as identified based on the methods used

H. Identify personnel, methods and funding for data entry, aggregation and analysis.

III. Attachments

   A. Generic Patient Needs Assessment
   B. Generic Practitioner Needs Assessment