



DARTMOUTH-HITCHCOCK MEDICAL CENTER  
CENTER FOR SHARED DECISION MAKING

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."<sup>1</sup>
- 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

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<sup>1</sup> POPULATION NEEDS ASSESSMENT: A WORKBOOK FOR ASSESSING PATIENTS' AND PRACTITIONERS' DECISION MAKING NEEDS, M.J. Jacobsen R.N. M.Ed., A. O'Connor R.N., Ph.D., University of Ottawa, 1999.

- 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.

- Background reading: POPULATION NEEDS ASSESSMENT: A WORKBOOK FOR ASSESSING PATIENTS' AND PRACTITIONERS' DECISION MAKING NEEDS, M.J. Jacobsen R.N. M.Ed., A. O'Connor R.N., Ph.D., University of Ottawa, 1999.
- 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
- C. POPULATION NEEDS ASSESSMENT: A WORKBOOK FOR ASSESSING PATIENTS' AND PRACTITIONERS' DECISION MAKING NEEDS, M.J. Jacobsen R.N. M.Ed., A. O'Connor R.N., Ph.D., University of Ottawa, 1999.