

10 TIPS FOR AN EFFECTIVE NEEDS ASSESSMENT



1. **“Begin with the end in mind.”** Covey’s famous habit is an important way to stay focussed and use limited time effectively. What outcome are you assessing for? What information do you need to inform your decision?
2. **Build rapport.** To surface needs efficiently, you need to start from a mutually trusting and respectful foundation. Show that you’re interested, you care, and that your client really matters.
3. **Understand eligibility.** Before proceeding with an in-depth screening, assess the obvious. Does the individual meet basic requirements for enhanced services?
4. **Get informed consent.** Ensure your client understands rights, responsibilities, and potential repercussions from various courses of action. Partner with your client to gather additional information, if necessary, or to make appropriate referrals.
5. **Be observant.** Clients may not ask for what they really need because they simply don’t know what they’re missing. Watch for cues that indicate an issue.
6. **Be holistic.** Recognize that people are impacted very differently by situations and circumstances that, on the surface, look the same. Consider the interconnection of stressors and supports, capacity and challenges, when determining what help may be needed.
7. **Use discernment.** Focus on needs or barriers that if addressed will have the most impact. Don’t “fix what ain’t broke” or “bite off more than you can chew.”
8. **“Thin slice.”** Malcolm Gladwell, in *Blink: The Power of Thinking Without Thinking*, introduced the notion of making complex choices in “the blink of an eye.” Learn to filter the most important factors from all the distractions. Be alert to informative cues, then listen to your inner voice.
9. **Make effective notes.** Create your own shorthand – use key words, abbreviations, acronyms, and/or diagrams. Reflect on them right after the session and expand as required.
10. **Be efficient.** Time is limited but it’s ultimately quicker to get things “right” the first time rather than having to repeat the process. Quickly review existing forms and files so that you are filling in gaps rather than reinventing the wheel.



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