

## Needs Assessment Guidelines

All applications should include a complete needs assessment.

The needs assessment is the best way for the submitter to present a justification for seeking industry funding. This vehicle is the best way to state your case and, if constructed appropriately, will anticipate questions by reviewers as well as provide appropriate rationale for justifying industry support.

A needs assessment should clearly and concisely demonstrate that a relevant problem or need exists. The first step of this process is to include relevant supporting data. Such data may pertain to demographics, economic health, results from surveys, or published data.

In general, the needs assessment should also clearly describe your target population and the need that is being addressed as it pertains to this audience.

The following methods of materials can be used to justify the need for a program:

- Epidemiologic data
- A search of the current literature
- Consensus of experts in a particular field
- A patient care audit
- A sample survey interview of prospective participants
- Faculty experience in clinical services
- Morbidity and mortality
- Input from specialty societies
- Faculty consultations in the community
- Experiences as visiting professors to community hospitals

A needs assessment is the foundation to a successful grant application. A thorough needs assessment will often include goals and methods on how to reduce the apparent need gap. These goals pertain to both the ultimate outcome of the project, as well as the minor objectives.

Whenever possible, particularly for larger projects, use appendices to provide details, supplementary data, references, and back up information. Appendices provide the reviewers with immediate access to details if and when clarification of an idea, sequence or conclusion is required.

# Needs Assessment FAQs

## **1. Should needs assessments be provided for non-accredited educational events?**

Yes. Any educational activity, whether accredited or not, that involves the exchange of scientific or medical information should have a needs assessment included with the submission package. If industry support is being solicited, then a needs assessment is a necessary as part of the review process.

## **2. What about for a simple dinner meeting with a guest speaker?**

Any educational activity funding request should have a needs assessment, whether it involves a single presenter or multiple presenters over several days. If industry support is being solicited, then a needs assessment is a necessary as part of the review process.

## **3. Are funding requests for a patient directed activity also required to have a needs assessment?**

Yes. A needs assessment is also recommended for patient directed activities in order to assist reviewers in evaluating whether support may be provided.

## **4. Do local professional societies or hospital departments who routinely invite guest speakers for regularly scheduled meetings also expected to provide a needs assessment?**

Yes. Seeking industry support for a routine meeting featuring a prominent expert does not eliminate the role of a needs assessment. There is a reason your organization invited this individual to present to your members. The needs assessment is the best way to present the educational gap that you have identified as well as what your expected learning objectives will be.

## **5. Is there a recommended length for each needs assessment?**

Well-designed needs assessments vary widely in length or content. Some include a variety of charts and tables and can result in needs assessments that are 10 to 20 pages long. Others may only have a few paragraphs on a couple of pages covering the statement of need, learning objectives, and target audience. While there is no ideal length, submitters should use caution on being too concise. A brief needs assessment rarely provides enough rationale to justify industry support and is likely to be deemed insufficient for grant support consideration.

## **6. Are examples of previously submitted needs assessments available for to examine?**

No. Needs assessments from previous submitters are considered proprietary and cannot be made publicly available without prior consent. However, there are numerous web sites that offer grant writing tips and/or guidance on constructing needs assessments that may be helpful to submitters who may not have as much experience in submitting educational grant requests.

## **7. Why are needs assessments considered so vital?**

Greater transparency requirements have been imposed by multiple policy making organizations. Industry funds provided for educational activities are under more scrutiny. Adequate documentation that a need exists for an independently developed learning activity helps insure that funds provided by commercial supporters are being used appropriately.