Welcome!

While we wait for everyone to join...

Please respond to the poll

Conducting A Needs Assessment

August 5, 2025

Katherine Webb-Martinez, Program Planning & Evaluation Director

Vikram Koundinya, CE Evaluation Specialist & Associate Professor of Extension

Priyanka Vyas, GIS Analyst, Informatics and GIS Statewide Program, UC ANR

Domena Agyeman, UCCE Agriculture and Natural Resources Economics Advisor, Butte, Glenn, and Tehama Counties

Hedmon Okella, 4-H Animal Science Advisor, San Benito, Monterey, and Santa Cruz Counties



Agenda

10:00	Welcome & Overview
10:05	How-to Needs Assessment Presentation & UCCE Examples
10:55	Break
11:00	UCCE Academics Share Their Approaches
11:30	Small Group Discussion
11:55	Wrap-up & Training Evaluation

Desired Outcomes

Participants gain ...

- Understanding of needs assessments basics (why, what, how, when)
- Basic understanding of how to write good needs assessment questions
- Understanding of how to use the findings to inform how you focus and develop your program
- Feedback on your needs assessment plan

What is Needs Assessment?

- Is the first step in the overall program planning process. It is an essential step in the program planning, development and evaluation cycle (Etling & Thomas, 1995).
- Driven by the question "What do clients need and how can those needs be met?" (Patton, 1982).
- One of the first priorities for a new extension educator is to conduct a needs assessment to inform their programming (Caravella, 2006).
- Needs assessment is one of the key educational competencies for extension educators (Ghimire, 2010; Koundinya, 2010).

Needs Assessment Approaches

Asset-based needs assessment

- Identify what is available or potentially available to a community.
- This approach can identify the available organizational, community, fiscal, and individual people skills.

Traditional needs assessment

Identify what is needed or lacking in a community.

"Asset-based needs assessment is a useful tool when we don't know enough about both assets and needs in a community".

Sacramento County Cooperative Extension is conducting a needs assessment to identify the level of importance in your community related to the following issues. By completing this survey, you are helping direct the work of the UC Cooperative Extension Service in serving your needs. The survey should only take about 15 minutes of your time. Your answers will be completely anonymous.

On a scale of 1 to 4, with 1 being "completely un-important" and 4 being "very important, please indicate the number that best describes the level of concern for your community

COMPLETELY	SOMEWHAT		VERY
UN-IMPORTANT	UN-IMPORTANT	IMPORTANT	IMPORTANT
1	2	3	4
	I		COMPLETELY UN-IMPORTANT UN-IMPORTANT 2 3

COMMUNITY ASSETS: Community assets are positive features that explain why we choose to live in a particular community. On a scale of 1 to 5, with 1 being "poor" and 5 being "excellent", please indicate the number that you believe most accurately rates each feature in your community. If you "don't know", please indicate.

Excerpts from UCCE Sacramento County Needs Assessment

				VERY		Don't
	Poor	FAIR	GOOD	GOOD	EXCELLENT	Know
	1	2	3	4	5	DK
Personal and family safety						
Availability of open space						
Recreational opportunities						
Place to raise a family						
Sense of community						
	_	_	_	_	_	

When to conduct a Needs Assessment?

- The program is brand new.
- You are new to the job.
- You want to learn more about what your clients need related to a specific condition.
- You need to document the needs for funding (Angima et al., 2014)
- You need additional information to communicate with your stakeholders.
- If the program evaluation focus is on how well it meets the needs of the intended audience (Patton, 1982)

Why do it?

Different potential uses

Definitely

- Developing your program: from goal setting to evaluation
- Performance appraisal

Maybe

- Collaborative statewide or regional needs assessment
- Commissioned study
- Journal article
- Justify requests for funding/grants
- Collaborative research project
- Identify partners/community org.collaborators

Benefits of Collaborative Needs Assessment

- Better understanding of needs at a big picture or regional level
- Addressing shared goals more efficiently
- Leveraging subject-matter expertise
- Leveraging limited resources
- Serving as a strategic planning tool for other program areas

UCCE Climate Smart Agriculture (CSA) Educational Needs Assessment

Purpose: Identify the CSA education needs of growers in California. Use needs assessment data for developing CSA education programs for growers.

Methods and sample: Mixed methods (surveys, focus groups). Survey sent to more than 12,000 farmers, 341 usable sample.

Benefits: Inform extension and research programming of the diverse team, leverage expertise.

Outputs: Journal articles, conference presentations both on the methods and results.

UCCE Dairy Collaborative & Ongoing NA

2017-2019

Purpose: Identify dairy producer needs and how best to direct & deliver UCCE programming

Target audience: CA Grade A dairy producers (list from CDFA)

Benefits: collective expertise leveraged

Outputs: Peer-reviewed journal publication;

presentations at meetings

2024-25

Why: CA dairy landscape (# farms, farm size, etc) has shifted so want to update the data to see how needs and desired outreach has changed.

How: Deploying same survey

First steps for new advisors

- Find out what is already known or available
- Get out and introduce yourself
- Develop relationships
- Define your clientele
- Get the lay of the land
- This informs who and what to ask about needs

My name is Fadzayi Mashiri, I am the new University of California Cooperative Extension (UCCE) Livestock and Natural Resources Farm Advisor, working in Mariposa, Madera and Merced counties. I am conducting a Needs Assessment to better understand the ranching community's management practices and challenges; and areas you may need more information or research done to improve production and resource management. My goal is to develop extension, educational and research programs that are relevant to your needs and this can only be possible if I get feedback from the community I am serving.

Your responses will be greatly appreciated. Thank you,

Fadzayí

Intro Letter

QUESTIONNAIRE

Name ______

- What is your main production enterprise(s) (cow/calf, stocker, sheep, poultry)
- Herd size 50 or less;
 50-100;
 100-200;
 300-400;
 more than 500
- 3) What are the main problems you deal with on your ranch or property you would want me as Livestock and Natural Resources advisor to focus the extension programs on? E.g. drought, weeds, diseases etc. Please provide some details about the issues.

Best Practices for Community Engagement

- Participatory approach in developing, pre-testing, analyzing, and interpreting questionnaires with members of the community.
- Tell that you are a UC ANR/UCCE person.
- Specify the purpose of the study.
- Discuss how their participation would contribute to improvements in others lives and their society.
- Do not use subordinating language.

Examples of Subordinating Language

"For us to help solve the school problems in your community, it is necessary that you participate in this study."

Better alternative: "Will you please be part of helping to solve the school problems in your county? Your responses can assist the county residents and school administrators in fully understanding the issues facing the schools here."

Best Practices for Community Engagement contd

- Establish trust.
- Ask for advice.
- Stress that the opportunities to contribute to this study are limited.
- Convey that others are also participating.
- When appropriate, use incentives as social exchange.

How to Organize a Needs Assessment

Phase 1: Exploration

 NA purpose, potential uses, audience, explore secondary data sources, what & how to collect data

Phase 2: Assessment

Implement the NA plan: collect, analyze, & synthesize data

Phase 3: Utilization

 Use the data to set program priorities, develop action plan to address needs/issues, communicate results

McKillip (1998) and Lepicki and Boggs (2014) as cited in Donaldson and Franck (2016)

Commonly Used Data Collection Methods

For secondary data:

- Literature/Document review
- GIS data

For primary data:

- Individual Interviews
- Group interviews (focus groups)
- Key-informant interviews
- Observation
- Surveys

Considerations given increased virtual methods

Many methods can be done online & could make data collection easier

- Zoom interviews with clientele and partners
- Surveys often already online
- Building on existing meetings some are now online, e.g.
 commodity mtgs. and ramped up other online forums (e.g. Dairy Facebook); it is a lot easier to visit virtual meetings

Document/Literature Review

Content analysis of existing information, secondary data

> Little to no participant burden

Best practices:

- √ Have an audit trail
- ✓ Systematic analysis and documentation

Natalie Price, UCCE Community Nutrition and Health Advisor

Mixed methods:

Reviewed county health improvement plans, health center community needs assessments, and relevant health data and policy reports, and informal interviews with ANR academics and key partners





Individual Interviews

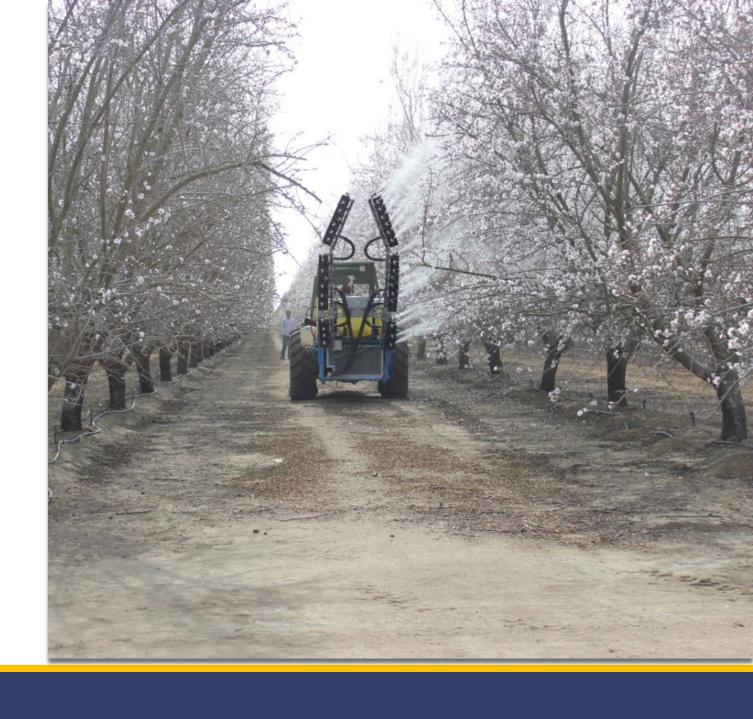
- Personal contact is desirable
- Sample group is smaller
- Sample group is unlikely to respond to a written survey
- Sample has people incapable of taking a survey
- You are not sure what is most important to potential respondents

Best practices

- State the purpose upfront
- Be consistent and neutral
- Use probing questions
- Send questions 1-2 days in advance

Elizabeth
Fitchner,
UCCE Farm/Orchard
Systems Advisor

Informal Interviews
piggy backing
on existing meetings



Key-informant interviews

- Verify collected data (e.g.: to understand needs vs wants)
- Get inputs from knowledgeable and influential people
- Explore unanticipated ideas

Best Practices

- Have a mix of people from different ages, races, ethnicities etc.
- ~10 people

Susie Kocher, UCCE Forestry/ Natural Resources Advisor

Mixed Methods including Key Informant Interviews



Group Interviews/Focus Groups

- Understand common issues or needs
- Don't know what questions to ask
- Want to know more from survey responses
- Foster trust and relationship-building
- Piggyback off existing meetings

Best Practices

- 6-12 people
- Explain the rules
- Make deliberate efforts to get answers from everyone

- Video: https://www.youtube.com/watch?v=FHcCNufXLsg
- AEA Blog March 2025: https://aea365.org/blog/extension-education-evaluation-evaluation-tig-week-using-focus-groups-in-extension-evaluation-by-vikram-koundinya/
- Focus group challenges 2025: https://open.clemson.edu/cgi/viewcontent.cgi?article=5614&context=joe

Clarissa Reyes & Katherine Jarvis Shean, **UCCE Orchard Systems** Advisors, with Amanda Crump, UC Davis professor

Mixed methods: Focus Groups for Spanish speaking farmworkers and survey for growers

Focus Group Discussion Overview

Demographics

- Each group will be construed of one of the following age ranges
 - 18-35
 - 35-50
- Each group will be construed of one of the following gender groups
 - Women only
 - Men only

Interviews will be recorded

- No personal identifiers will be used
- General questions will be asked, but nothing identifying each individual
- Interviews will be recorded for the sole purpose of data collection
- Interviews will be transcribed then deleted Assistants will be taking notes on nonverbal cues for data collection purposes

Focus Group overview

- Preamble introduction (discussion of rules, questions, purpose)
 - a. Sarai will introduce herself and the project
 - b. Will obtain oral consent to use the data for further analysis
 - c. Will obtain oral consent to record the focus group
 - Will discuss the overall expectations and outcomes of the focus group
- 2. Focus group question phase (Translations at end of document)
 - a. Questions will be asked and sarai will have follow up questions and facilitate conversation by ensuring everyone has the opportunity to participate and convey thoughts

Observation

- Observe practice/behavior
- Want to see and listen
- Confirm fidelity of implementation

Best Practices

- Have an observation guide
- Take field notes

Observation Prompts	Actions You See or Comments You Hear
1) Engagement/Deliverya. How are students engaging in the activities?b. What is their body language?	
2) Learninga. Are students expressing what they are learning?b. Is the environment conducive to learning?c. Are students forming new connections? Why? How?	
 3) Staff friendliness & circulation a. Warm tone of voice and respectful language b. Attentive and responsive c. One-on-one interactions with every student 	

Observation Guide: Elkus Ranch Summer Camp (June 25th – Aug. 26th, 2018)

Adapted from

Klink, J. (2014). *Field Day Observation Guide*. Environmental Resources Center, University of Wisconsin-Extension.

Carlson, S. P., Heimlich, J. E., Storksdieck, M., & Meyer, N. (2009). *Best* practices for field days. Assessment tools and observation protocols. University of Minnesota Extension.

Surveys

- To collect standardized information from large sample
- Privacy is important or independent opinions and responses are needed
- When there are resource constraints (mainly time and money)

Best practices

- Be clear about the purpose
- Be focused: only ask what you need to
- Establish reliability and validity of the questionnaire
- Follow design principles

Michelle Leinfelder- Miles, UCCE Farm / Delta Crops Advisor

Mixed Methods:
Document review,
Survey using
Clickers & Informal
Interviews





Priyanka Vyas, Informatics and GIS (IGIS)

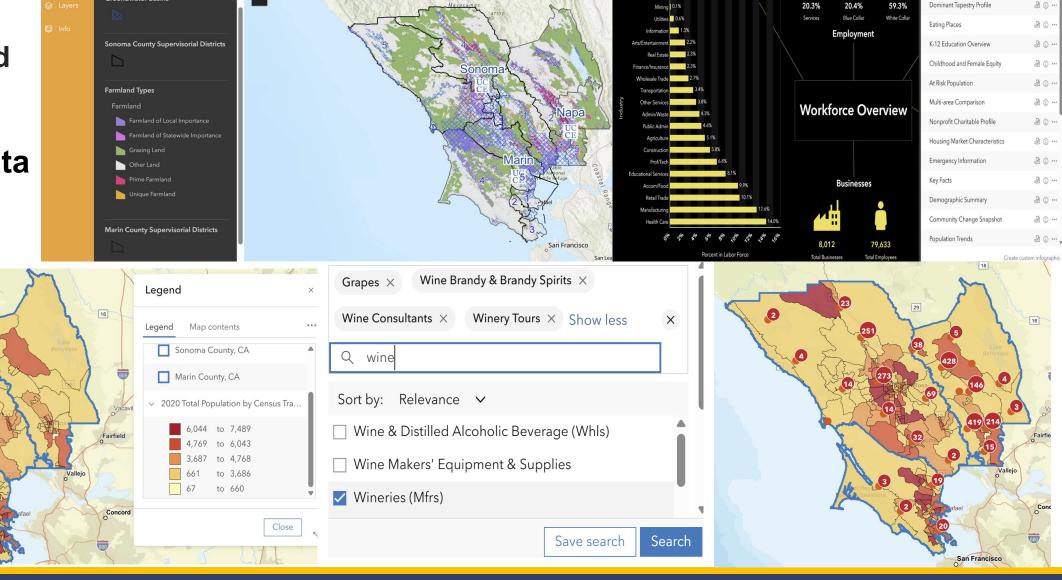
UCCE North Bay Counties Agriculture and Natural Resources

!≣ Legend

New Group Layer

Groundwater Basins

Secondary data using GIS



Economic Development Profile

Labor Force by Industry

Napa County, CA Geography: County Economic Development Profile V

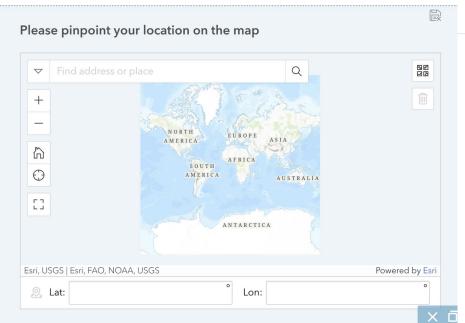
Target Market Summary

earch for infographics by name Q

Economic Development Profile

@ ① ···

GIS-based tools for primary data collection



Farmers Groundwater Usage Survey

We appreciate your participation in this survey. Your feedback is important for groundwater management practices in Napa, Sonoma, and Marin County. To developing strategies to support sustainable water use in agriculture.

Personal Information
What is your name?*
What is the name of your farm?*

ArcGIS Survey123

ArcGIS Field Maps

Which county is your farm located in?*

-Please select-	•

Urban Agriculture Expansion in Santa Clara

Thank you for participating in our survey. Your input will help us understand the potential an challenges of scaling up urban agriculture in Santa Clara. Your responses will guide future initiatives and policies to support urban farming in our community.

Personal Information	
Please provide your full name.*	
How long have you lived in Santa Cla	ara?*

Interest in Urban Agriculture 🕤

On a scale of 1 to 5, how interested are you in urban farming (1 being not interested at all, 5 being extremely interested)?*

Ensuring Inclusive Access to All through Need Assessment

Consider participants

- Language
- Age
- Abilities
- Male-female interactions, communication and decisionmaking styles, family relationships
- Approaches to knowing and ways of knowing
- Etc.

Best Practices

- Work with clientele/partners to develop needs assessment
- Cannot know everything about another culture, but can ask questions and learn in service of others
- Self-reflection
- Secondary data might not include all your clientele groups; identify and contact organizations working with those groups American Evaluation Association blogs
- "Always place the people who are most impacted at the center of conversations which seek to find solutions to problems affecting them." MPHI

Margaret Lloyd, UCCE Small Farms Advisor

On farm
Observation
& Interviews



Guidelines for Writing Good Questions

- 1. Do not use abbreviations, slang, or acronyms.
- 2. Avoid double-barreled questions.
- 3. Avoid questions that have unstated assumptions.
- 4. Avoid leading questions that imply a desired response.
- 5. Avoid questions that may elicit embarrassment, suspicion, or hostility in the respondent.
- 6. Have mutually exclusive answer options.
- 7. Have equal variation on both the sides of the rating scale.
- 8. Ensure that the question stem matches the answer choices.

Writing Questions Group Discussion

- 1. Research indicates that buying high salt foods is bad for health? Do you buy such foods for your home?
 - Yes No
- 2. Was your community's input taken and used in developing IPM Extension programs in your county? Yes No
- 3. To what extent do you utilize nutrition information from UC ANR Advisors to inform food purchase decisions?
 - -Yes Somewhat No

Using the Findings to Focus and Develop Your Program

Priority Setting

- -You may not ask clientele to prioritize their needs, but even if you do -clientele priorities are not the only things to be considered...
- You can take a qualitative approach to analyze all that you know using a variety of filters/considerations to help you determine the priorities on which you will focus



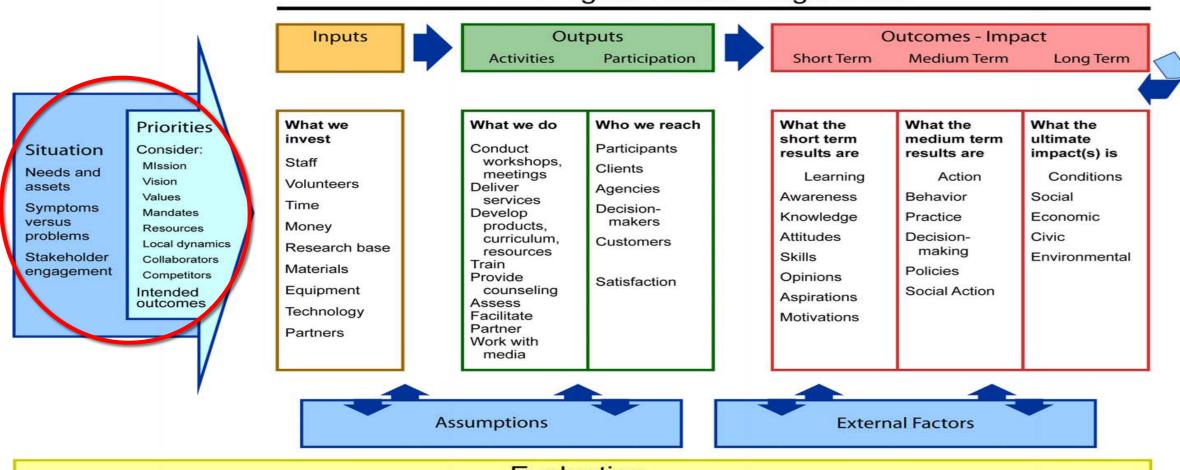
Priority Setting Considerations?

- Individual job description, expertise, collaborations, resources
- Organization strategic vision, public values, comparative advantage
- Clientele what's important to them, extent & frequency of problem
- **Likelihood of Impact** What's the state of the science (i.e. is there enough known for you to make progress)? Probability of successful resolution (i.e., probability of an economically feasible solution)

Using Your Needs Assessment Findings

To Develop Focused, Relevant Programs

Program Action - Logic Model



Evaluation

Focus - Collect Data - Analyze and Interpret - Report

BREAK



UCCE Needs Assessment Speakers

Domena Agyeman, UCCE Agriculture and Natural Resources Economics Advisor, Butte, Glenn, and Tehama Counties

Hedmon Okella, 4-H Animal Science Advisor, San Benito, Monterey, and Santa Cruz Counties

Economic needs assessment of Agricultural Producers

Domena A. Agyeman

UCCE Agriculture and Natural Resources Economics Advisor Butte, Glenn, and Tehama Counties

Timeframe and data collection

Timeframe:

- Started within the first month in my position
- Took about 10 months to complete
 - An ongoing process

Data collection:

- Phase 1: Meeting with colleague advisors
- Phase 2: Attended grower/stakeholder meetings
- Phase 3: Developed a survey instrument
 - Online and in-person distribution
 - Used existing mailing lists from colleagues





Timeframe and data collection

The Questions:

- Based on themes from grower/stakeholder meetings (e.g., regulatory concerns, farm business management)
- Consulted with colleague advisors to better understand stakeholder language

GENERAL CHALLENGES OF YOUR OPERATIONS Do you have reliable internet needed to conduct business operations? ☐ Yes ☐ Sometime ☐ No What is the ONE most challenging regulation for your operation? ☐ Transportation/Trucking ☐ Groundwater ☐ Land Use ☐ Surface Water Availability ☐ Air/Burning □ Labor ☐ Water Quality - Irrigated Lands Regulatory Program □ Other (please specify) What are the top 3 challenges impacting the future success of your agriculture operation?

Economics and Business Management Information

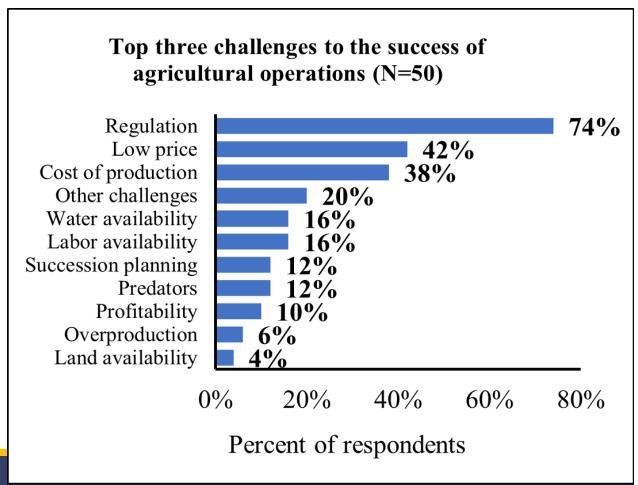
How confident are you regarding the following financial business management topics?

Very confident	Moderately confident	Not confident
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
0	0	0
	Confident	confident confident O O O O O O O O O O O O O O O O O O O O O O O O

Identifying focus areas

Prioritizing needs:

- Frequently mentioned issues
- Fit with expertise





Identifying focus areas

Choosing research and extension methods:

- Extension: Based on responses from needs survey (e.g., workshops, newsletters)
- Research: Nature of the question, data availability, collaboration opportunities

Support/Funding

Support:

- County directors and colleague advisors
- Government agencies—Farm Bureau and FSA
- Access to survey tools through UC ANR—Qualtrics

Funding:

- No funding needed in my case
 - Start-up and advisor support funds are available if needed

Lessons learned

Some important consideration:

- Start early
- Keep survey short
- Be honest about what you can do about stakeholder reported issues

Needs assessment in annual evaluation

- Theme in annual evaluation report
- Guides development of program goals

Summary report



Economic Needs Assessments of Agricultural Producers in Butte, Glenn, and Tehama Counties

Domena A. Agyeman, UCCE Agriculture and Natural Resources Economics Advisor Butte, Glenn, and Tehama Counties

Introduction

This report summarizes the primary challenges reported by agricultural producers from Butte, Glenn, and Tehama counties who participated in an economics needs assessment survey. Respondents were asked to indicate the top three challenges impacting the future success of their operations and to suggest what the University of California Cooperative Extension (UCCE) should focus on to improve the success of their operations.

Location of business and main products produced by respondents

Among 52 producers who completed the survey, 75% had their businesses located in Butte county, while 15% and 14% were based in Glenn and Tehama counties, respectively. Additionally, 37% reported they had businesses in other counties, including Colusa, Plumas, Sierra, Stanislaus, Sutter, Sonoma, Solano, Tulare, Merced, Lassen, and Yuba. Most respondents (71%) were crop producers, 42% were livestock and hay producers, and 4% were timber producers. Figure 1 shows the percentage of respondents by the types of products they produced.

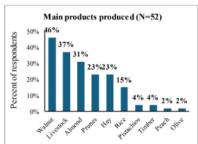


Fig 1: Percent of respondents by types of products they produced.

Main challenges impacting the future success of operation



Summary report is available on the Sac Valley Orchards website: https://www.sacvalleyorchards.com/





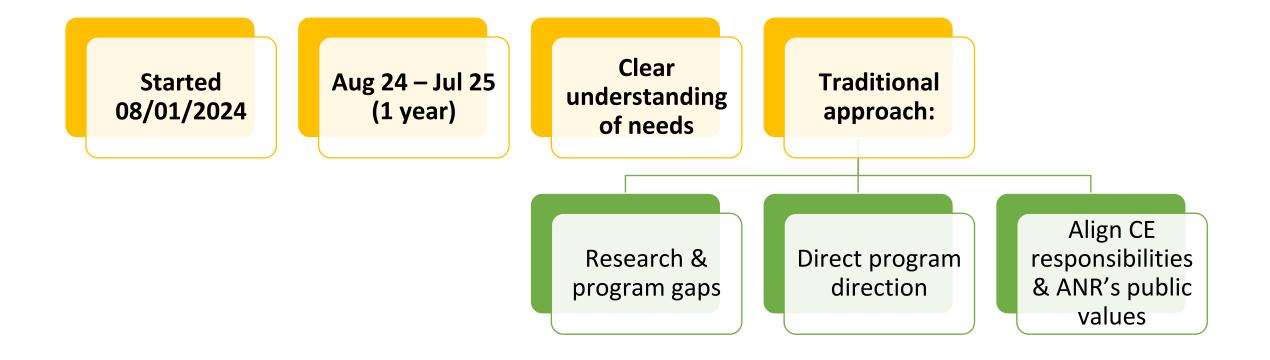
Needs Assessment

Hedmon Okella, Ph.D.

4-H Animal Science Youth Advisor
San Benito, Santa Cruz and Monterey Counties

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Needs Assessment (NA) process





Needs Assessment (NA) process...





Primary → Initiating relationship; identify clienteles ± partners **Secondary** → Baseline; Insights on known gaps ± interventions

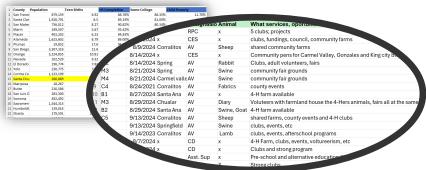


Questions: Universal 4-H Common Measures v2.0





<u>Data</u>: Quantitative & Qualitative





Needs Assessment (NA) process...



Observation

K.I interviews

Listening sessions

Secondary Data

4-H Enrolment

CA Educ Enrolment

NAEP

American community survey

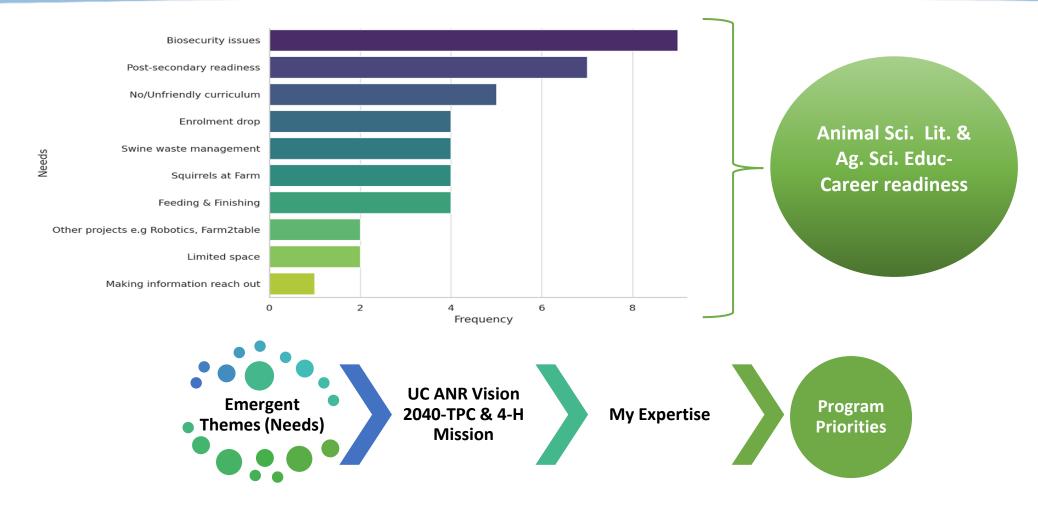
Observation Checklist	Observations: Actions/photos/comments
Animal Wall being Health & Discounity	
Animal Well-being, Health & Biosecurity a. Are the youth handling animals safely?	
b. Any contact with other species (wild and domesticated)	
c. What biosecurity measures are on ground?	
Food production & safety a. What is the safety condition where animals are raised? b. How are the feeding and watering practices?	
Life Skills & Career Development a. Is the environment conducive for Ag. skill & knowledge gain? b. Do youth interact or work with others? Why? How?	



- 1. What support programs are available to youth? (e.g. afterschool, farm)
- 2. What are the needs of youth in our county?
- 3. How can those needs be met?



Needs Prioritization





From Needs to Research & Extension modes

CA 4-H Compendium & **NA** suggestions



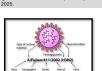
Adopt, Pilot & **Evaluate delivery** modes





High Pathogenic Avian Influenza (HPAI): A Biosecurity perspective for youth poultry producers.

Background
Avian influenza, also known as "avian flu" or "bird flu", is a contagious viral respiratory disease caused by the influenza A virus and can lead to serious illness and death in birds and mammals. Aviar then, 173,11 million birds have been affected (Figure 2), with lowa, Ohio, California, Colorado and Indiana being the most affected states (Table 1), as of May 30, 2025.



Factsheets



What we know about the spread

(US APHIS), 82 % of the detections are consistent with wild bird introduction. Wild birds, such as ducks, gulls, geese and shorebirds, can carry and spread these avian influenza can kill domestic poultry, 18% an



Raising animals, Farm waste & Biosecurity



The youth Lab

UNIVERSITY OF CALIFORNIA Agriculture and Natural Resources

Lessons learned



- Needs will always keep coming, be ready to <u>filter+no</u> <u>promise</u>
- Talk with <u>other Advisors</u> -they have a wealth of experience to support you
- Needs assessment aids <u>relationship building±funding</u>
- Never underestimate the power of secondary databaseline
- · Value **project board** during Needs Assessment for AE

Thank you for your attention!







Peer-to-Peer Learning

Small groups based on new programmatic structure

- Introductions
- Describe your needs assessment approach, including which data collection method(s) you used/plan to use & why
- How will you use the results of your needs assessment?

Program Areas	Program Teams	
Agronomy & Horticulture Chair Tom Turini	 Agroecology, Organic & Regenerative Systems Agronomic Crops Environmental Horticulture, Floriculture, Berries & Nurseries 	 Fruit & Nut Tree Crops Urban Agriculture & Community Gardens Vegetable Crops Viticulture
Animal Production Systems Chair Dan Macon	Aquatic Food Production SystemsDairy Production	Meat ProductionSpecialty Livestock & Poultry
Community & Economic Development Chair Keith Taylor	 Agri-Food Technology & Innovation Biobased Products & Bioeconomy Disaster Preparedness & Response 	 Food Systems, Food Waste & Business Support Labor & Workforce Development
Integrated Pest Management Chair Jhalendra Rijal	Entomology, Arthropod & Vertebrate PestsPlant Pathology & Nematology	Weed Management
Natural Ecosystems & Working Landscapes Chair Jeff Stackhouse	 Biodiversity Conservation & Stewardship Climate Science & Ecosystem Impacts Fire Management, Policy & Resilience Forest & Upper Watershed Systems 	 Human-Wildlife Interactions Rangeland & Grazing Systems Soil Health & Management Water Quantity, Quality & Security
Youth, Families & Communities Chair Natalie Price	 Community Nutrition & Health Native American Community Partnerships Positive Youth Development & 4-H 	Science Literacy & Critical ThinkingSystemic Inequalities