



Designing a District-wide Needs Assessment for Professional Growth: **A Playbook**

by Sheila B. Robinson, Ed.D.



A Data-informed Approach to Professional
Development Programming

Introduction

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Does professional development in your district meet the learning needs of your staff? How do you know? What data informs programming for professional growth? What content, formats, and learning opportunities should your professional development program offer to engage staff and enhance student outcomes?

If you're struggling with or unsure of the answers to any of these questions, this playbook is for you.

- ***What research tells us about effective professional development***
- ***What a needs assessment (NA) is — and why you should conduct one***
- ***How to design an NA and use the results to inform professional development programming***



(PRE-SEASON)

01. What makes professional development effective?



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We know what makes professional development high quality and effective. Darling-Hammond, Hyler, and Gardner’s (2017) study, for example, uncovered seven key characteristics:

Effective Professional Development:

1. Is content focused
2. Incorporates active learning utilizing adult learning theory
3. Supports collaboration, typically in job-embedded contexts
4. Uses models and modeling of effective practice
5. Provides coaching and expert support
6. Offers opportunities for feedback and reflection
7. Is of sustained duration¹

Learning Forward, the preeminent association for professional development, offers a set of [Standards for Professional Learning](#) that “outline the characteristics of professional learning that lead to effective teaching practice, supportive leadership, and improved student results.”² These standards revolve around Learning Communities, Resources, Learning Designs, Outcomes, Leadership, Data, and Implementation.³

¹ Darling-Hammond, L., Hyler, M. E., Gardner, M. (2017).

² *Standards for Professional Learning*.

³ Ibid.

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We also know from the [Every Student Succeeds Act \(ESSA\)](#) that professional development is expected to be:



Sustained: taking place over an extended period; longer than one day or a one-time workshop



Intensive: focused on a discrete concept, practice, or program



Collaborative: involving multiple educators, educators and coaches, or set of participants grappling with the same concept or practice and in which participants work together to achieve shared understanding



Job-embedded: a part of the ongoing, regular work of instruction and related to teaching and learning taking place in real time in the teaching and learning environment



Data-driven: based upon and responsive to real-time information about the needs of participants and their students



Classroom-focused: related to the practices taking place during the teaching process and relevant to the instructional process

Knowing what makes for effective professional learning is only one piece of the puzzle. Figuring out what your staff needs to learn, what they want to learn, and what formats or structures work best for their learning are pieces that can be assembled with a needs assessment process.



(PRE-SEASON)

02. What is a needs assessment?

A needs assessment is based on the concept of “need.” One way to think about need is the gap between a current state (“what is”) and a desired state (“what should be”). Another way is to consider need as a set of problems or difficulties that must be resolved in order to reach your goals. Watkins et al. (2012) warn about the danger of ignoring gaps when you make decisions in *A Guide to Assessing Needs*:

“... without a clear distinction between where you are and where you want to be, then the odds of achieving desired results are greatly diminished, and resources are lost. You have also missed the opportunity to compare alternatives. Likewise, it may be that the solution you propose is useful but that it is even more effective when paired with another activity.”⁴

⁴ Watkins, R., Meiers, M.W., & Visser, Y.L. (2012), p. 16. *2 Standards for Professional Learning*.

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A needs assessment may resemble a research study. It's often associated with program evaluation and uses similar tools and methods including:

- ..> Engaging stakeholders and understanding what you want to accomplish
- ..> Posing one or more broad questions that drive the work
- ..> Collecting data to answer those questions
- ..> Analyzing and interpreting the data
- ..> Disseminating and using results to inform decisions

In practice, an NA might be as simple as conducting a survey to understand the staff's preferences for professional learning formats (online courses? face-to-face courses? book studies? collegial circle meetings?) and topics of interest. Depending on the nature of the "big" questions you pose (see Play by Play below), you may conduct a larger scale study that includes other data collection tools such as interviews, focus groups, or observations. You can also incorporate existing student achievement, attendance, or disciplinary data to inform decisions around professional development programming.

Simply put, a needs assessment is "a group of activities that lead up to decisions that result in actions."⁵

⁵ Ibid., p. 2.



(PRE-SEASON)

03. Why conduct a needs assessment?

A needs assessment helps you make “justifiable and informed decisions” (Watkins, Meier, and Visser, 2012). An NA is a way of understanding how factors like staff perceptions, current programming, and student achievement can inform and justify decisions for professional development (as well as other kinds of educational) programming and policies. An NA can help you make better decisions by collecting and analyzing relevant data and can help move your school or district toward its goals for staff and students.





(THE DRAFT)

Choose your team and organize the players

A needs assessment is best when it's done collaboratively. NA team members can be involved at any point in the process. They may vet the NA purpose statement, have input in designing survey or interview questions, conduct interviews or moderate focus groups, help analyze data, and disseminate findings.



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Who should be involved in the design and implementation of the NA? Consider:

- Who is interested, available, appropriate to serve on the team? While there may be administrators or other leaders whose titles lend themselves naturally to this work (e.g., Director of Professional Development), consider including people from other stakeholder groups: teachers, parents, union leaders, older students, etc. Including their voices will garner support not only for the NA but also for future programmatic decisions based on results of the NA.
- What roles will individuals play? Who will be responsible for what? Who are the decision makers? Whose voices will be heard and considered? Who you will obtain buy-in from in order to increase participation (and thus accuracy, completeness, and richness of the data)?
- Be sure to include on the team those who will have responsibility for implementing recommended solutions (e.g., PL leaders, curriculum leaders, principals, teacher leaders).



Pro Tip:

Vet needs assessment “products” as they’re developed (e.g., purpose statement, broad questions, overall NA plan, survey questions) with key groups such as teachers’ union leaders, superintendent’s cabinet, and curriculum leaders, and ask for their input.



(THE KICKOFF)

Develop a needs assessment purpose statement

First, get clear on WHY you want to conduct a needs assessment. What's going on in your school or district (with professional development in particular) that indicates it's time to gather information to inform decisions? What data exists to support this?

Here are a few possibilities that may make you say, “Yes, it’s time we conduct an NA”:

- Lower than expected participation in voluntary professional development
- Apparent gaps in PD offerings
- Current district PD plan is outdated
- Student achievement is not meeting goals
- Increasing disciplinary referrals or suspensions
- Decreasing student attendance rate
- Teachers struggling to implement new curriculum
- Desire to move to standards-based grading
- Anecdotal understanding that teachers struggle with technology tools
- Desire to include staff, parent, community, or student voices in PD programming

Of course, there could be many other potential catalysts for an NA. Think about your reasons, write them down, and have conversations with colleagues, teams, or committees until you can boil it down to a few sentences or a short paragraph that will function as your NA purpose statement.

Example purpose statement:



The Office of Professional Development needs to understand what our educators and support staff need to learn in order to be effective in increasing our students' academic and social emotional skills. Our student achievement scores are not where they need to be, and we understand from staff that challenging behaviors are getting in the way of instruction. Clearly identifying professional learning needs will help the Office plan and provide appropriate PD opportunities to address them. This needs assessment project consists of a district-wide survey of teachers and support staff designed to collect staff members' perceptions of their own professional learning needs, preferences for formats (in-person online, etc.), and experiences with current district-wide and building-based offerings, along with recent teacher evaluation and student-related data. Results will be used to inform future PD programming.



Pro Tip:

Beware of the temptation to simply brainstorm solutions at this point! It may feel easy to say “If teachers are having difficulty with the new curriculum, we’ll simply bring someone in to help them unpack it and learn how to implement it.”

*But what if it’s not a problem with **understanding** the curriculum or knowing **how** to implement it? What if the problems lie in the fact that teachers don’t believe the new curriculum will work for their students or that they feel they have tried it and their students are still falling behind? In bypassing the opportunity to collect, analyze, and interpret data, especially from potential end users — PD participants — we risk implementing the wrong approach. A needs assessment offers relevant data that informs the selection of specific interventions.*



(THE PLAY BY PLAY)

01. Identify and articulate the “big” questions

Do this in the same way you would if you were conducting a program evaluation of professional development. Return to the purpose statement you created to inform these questions. Don't list every interest you have, but rather limit the scope to about 1-3 broad questions that could meaningfully inform your decisions around PD programming.





Example needs assessment questions:

- How well are current PD offerings engaging our staff?
- To what extent is our PD plan helping advance district goals?
- How are current PD resources allocated and being used?
- What PD structures and formats are working well in engaging staff?
- What topics or skills do staff identify as areas of need for PD?
- What gaps exist in our current PD programming?
- What PD needs do our teacher evaluation or student achievement data point to?





(THE PLAY BY PLAY)

02. Conduct reconnaissance

What data already exists that may inform the needs assessment? You'll need existing data to determine your current state. Certainly you will want access to professional development program data.



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It is easiest if this is collected and stored in one district-wide database so that you can easily access and explore the following:

- Number of offerings
- Topics or subject area
- Formats (e.g., face-to-face, online)
- Time slots (e.g., during the school day, after school, summer)
- Duration (e.g., full day, 1-hour, 2 hour)
- Attendance (e.g., who attended, and how many attended)

Ideally, you'll want easy access to teacher evaluation data to identify potential gaps in learning, knowledge, or implementation, and of course, student achievement, attendance, and disciplinary data to uncover potential learning needs. Some professional learning management software handles both professional development and teacher evaluation data, making it easy to identify potential PD needs and gaps in current programming.

All of these data points can be integrated with and compared to findings from surveys, interviews, focus groups, or observations to help answer those big questions.



(THE PLAY BY PLAY)

03. Identify “need to knows”

Brainstorm a list of what you need to know from staff members in order to inform future PD programming. Once you’ve exhausted ideas weed out what might be “wants” vs “needs”: those items that may interest you but are not necessary to move your programming forward. Then, revisit your needs assessment purpose and initial broad questions to ensure your list of “need to knows” aligns with them. Prune out any that do not align.





Example “need to knows”:

- Where are teachers’ and staff’s learning challenges?
- What are people’s skill deficits (e.g., understanding student needs, building relationships with students, incorporating tech, responding to behaviors/crises, mindsets, feeling burnout)?
- What are people’s beliefs or understandings of challenging behavior, student discipline, etc.?
- What are people’s understandings of working with students with disabilities?
- How have students benefited from teachers’ and staff’s professional learning?
- How has PL impacted practice and student learning?
- What PL (e.g., specific events, presenters, formats) has been beneficial/effective?
- Where are people in their current understanding of our district’s major focus areas?
- What might building leaders need that might be different from what others need (e.g., we assume they have the same base knowledge, but that’s not always the case)?
- What makes people attend voluntary PL?
- What time of day, what days, what durations, what formats (face-to-face, online, 1:1 coaching, etc.) work well for our staff?





(THE PLAY BY PLAY)

04. Determine data collection methods and create a plan

As you work through your “need to knows,” consider which may be addressed with a set of survey questions, with more in-depth conversations with staff members such as in individual interviews or focus groups, by visiting classrooms to see instruction or classroom management in action, or by examining data already in existence (e.g., teacher evaluation or student-related data). From this, create a needs assessment plan that spells out which data collection strategies will be used to answer the broad questions and “need to knows,” along with a timeline and indication of who is responsible for each part of the plan.





Pro Tip:

Use a matrix like the one below to ensure that each broad question will have one or more data collection strategies associated with it.

Broad Question	Data Collection Strategy	Timeline	Who Is Responsible
1			
2			
3			



(THE PLAY BY PLAY)

05. Identify potential challenges

Be proactive and brainstorm with your team any potential roadblocks or challenges that could get in the way of creating or implementing a needs assessment so that you can be ready to address them if and when they arise. One particular challenge may be the perception that if you ask staff about their preferences and desires, they will expect that all of these will necessarily be put into practice.





Example challenges:

- Our history with needs assessment surveys: when we ask about PL needs, the data consistently shows that people want more on classroom management, but we believe that strengthening instruction and social emotional learning is the best way to address challenging behavior, rather than offering more courses on classroom management.
- We've hired "big name" consultants but observed no changes observed after single events.
- People don't know what they don't know.
- People complain that they don't have time to implement new learning, strategies, etc.
- We may need a different set of questions for different groups (e.g., teachers, paraprofessionals, administrators).
- Only a small number of people may complete the survey.





(THE PLAY BY PLAY)

06. Identify respondents

Who will be invited to complete a survey? It's easy to think "all instructional staff" or "all support staff," but it's important to identify groups by title. For example, many districts have teachers in specialized positions outside of classrooms, such as literacy coach or math interventionist. Will they be invited to complete a survey distributed to teachers? What about people in positions like speech pathologist, psychologist, social worker, occupational and physical therapist, art and music therapist, school counselor, behavioral support staff, etc.? Consider support staff such as people who work 1:1 with students with disabilities, classroom aides, teaching assistants, and library media aides. Will administrators be part of the data collection? If so, determine which ones will participate, and whether they will take part in the same or different surveys, interviews, or focus groups.





(THE PLAY BY PLAY)

07. Design questions

This section describes specific steps for designing a needs assessment survey, but much of this advice can also be applied to preparing for individual interviews or focus groups. It's important to educate yourself on [how to develop an effective survey](#) or [how to run focus groups](#) with high-quality questions if you are using these approaches. Robinson and Leonard (2019) describe quality questions as

*"...relevant and engaging to respondents because researchers have taken the time to carefully craft them to reflect respondents' ability and willingness to answer, and their unique cultures and context.... Quality questions are designed with an understanding of the anatomy of open- and closed-ended questions, of how to use language to elicit response, and of how to arrange questions into a coherent measurement tool."*⁶

⁶ Robinson & Leonard, 2019, p. 3.



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From your list of “need to knows,” start to build out a set of possible questions with thoughtful planning of exactly how to ask each question. It’s tempting to leave many questions open-ended, but consider the data that will result from this and how you will analyze it. For example, in a survey with just three open-ended questions and 500 responses, you’ll get up to 1500 answers to analyze! Balance the need for gathering a lot of data to incorporate staff voices in PD programming with the feasibility of analyzing and using the data you collect.

Think about what **demographic information** you may need from respondents. While it may feel important to collect information such as which schools respondents work in; which grade levels, departments, subject areas; how long people have taught or worked at a school, etc., the more demographic questions you ask, the less anonymous the survey will be. Perhaps only one music teacher serves grades K-2, or only one 4th grade teacher has been at a school for 12 years. Consider only what you need to know from respondents to answer the broad questions you posed and whether you plan to disaggregate the data in that way (i.e., looking at how more experienced teachers answered certain questions vs. less experienced teachers, or looking at how elementary vs. high school teachers responded). Is it important to compare results from 4th vs. 5th grade teachers, or is it enough to know whether responses came from elementary vs. secondary level teachers? Having broader demographic categories helps preserve anonymity. Think carefully, too, about whether you need information on more sensitive areas such as race/ethnicity or gender.



Pro Tip:

Include questions on a survey (or interview, focus group) that ask respondents about the “positives.” Ask questions about what is already in place that is working in professional learning: what they appreciate, what PL work or courses they have benefited from, what structures or formats are working well, etc.

Example - Consider the response options on the left vs. the right to preserve anonymity.

How long have you been teaching?	How long have you been teaching?	
→ 1-5 years	→ 1-3 years	→ 13-15 years
→ 6-10 years	→ 4-6 years	→ 16-18 years
→ 11-15 years	→ 7-9 years	→ 19-21 years
→ 16 or more years	→ 10-12 years	→ 22 or more years



(THE PLAY BY PLAY)

08. Develop a plan for administration

Determine whether your survey will be online or on paper, and if online, which platform you will use. Your professional development management software may even have a built-in survey tool. Identify the best time to ask potential respondents to complete the survey. Ideally, it would not be on weeks consumed by state tests, Homecoming, or other big events. Some schools have had good response rates by allowing staff to complete surveys during designated staff meeting times or on professional development days. If staff are expected to complete the survey on their own time, be sure to give them at least a week, including a weekend.





(THE PLAY BY PLAY)

09. Invite respondents

Whether you are inviting people to partake in a survey, interview, focus group, or even a classroom observation, the invitation should contain specific elements. For a survey, it should clearly state:

- Who is administering the survey
- Why data is being collected
- How the data will be used
- Whether the survey will be anonymous or not
- Approximately how long the survey will take to complete
- When the survey will close





Example: Survey invitation:

The Office of Professional Development needs your feedback to inform planning of professional learning experiences. For us to understand your needs and how we can better support you, we need your input!

This anonymous survey was developed collaboratively with leaders from our Teachers' Union, our Curriculum Leaders, and our Superintendent. It should only take about 8-10 minutes to complete.

Please complete the survey by the end of the day on **June 21st**. Here is the link: [\(add link\)](#)

Thank you!



Don't forget to schedule survey reminders. For a very short survey (e.g., 5-7 minutes) you may want to leave the survey window open for only 7-10 days, issuing a reminder around the halfway point. For a longer survey, consider a longer window and additional reminders.



The End Zone and Post Game Show

Once you have collected data that answers the broad questions you posed at the beginning of the NA process, you analyze and interpret that data and prepare reports.



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Create a plan with your team for what you will do with the findings and recommendations that emerge from the needs assessment. How will results be shared and used? You may want to meet with relevant groups (e.g., curriculum leaders, school improvement teams) or individuals (e.g., building principals, department leaders) to review the results and recommendations and determine how best to support them in developing or leading professional learning. Consider how individuals or departments might be expected to implement recommendations.

When you make a concerted effort to learn about staff learning needs through a range of data sources and inputs, you can confidently plan a robust professional learning program that will effectively address professional growth needs using structures and formats that work.

“In our vision for effective learning, educators will identify their needs collaboratively and locally, based on the needs of their students, and in a cycle of continuous improvement.”

– [Learning Forward](#)



Pro Tip:

Create different report “products” for different audiences. The Board of Education may want a presentation during one of their meetings that highlights a more comprehensive report. Teachers may want a one-page report or infographic summarizing results and recommendations from the NA.

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Sheila B. Robinson, Ed.D., of Custom Professional Learning, LLC, is an educational consultant and program evaluator with a passion for professional learning. She designs and facilitates professional learning courses on program evaluation, survey design, data visualization, and presentation design. She blogs about education, professional learning, and program evaluation at www.sheilabrobinson.com. Sheila spent her 31-year public school career as a special education teacher, instructional mentor, transition specialist, grant coordinator, and program evaluator. She is an active American Evaluation Association member where she is Lead Curator and Content Writer for their daily blog on program evaluation and is Coordinator of the Potent Presentations Initiative. Sheila has taught graduate courses on program evaluation and professional development design and evaluation at the University of Rochester Warner School of Education where she received her doctorate in Educational Leadership and Program Evaluation Certificate. Her book *Designing Quality Survey Questions* was published by SAGE Publications in 2018.

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