Tool A. Stakeholder Analysis Matrix

Instructions: Use this template to identify the stakeholders for the needs assessment, including their level of influence, which issues are important to them, and how they will be engaged.

Stakeholder Name and Affiliation	Contact Person Email, Phone	Impact How much does the project impact them? (Low, Medium, High)	Influence How much influence do they have over the project? (Low, Medium, High)	What is important to the stakeholder?	How could the stakeholder contribute to the project?	How could the stakeholder block the project?	Strategy for engaging the stakeholder
EXAMPLE *Tom Jones* *Acme Health Department*	*tjones@phd.gov* *123-456-7890*	*High*	*High*	*Maintaining ability to collect data using BRFSS*	*Advocate for inclusion of BRFSS module on caregiving*	*Block funding for BRFSS optional module*	*Monthly round-table discussions*

Source: http://www.tools4dev.org/resources/stakeholder-analysis-matrix-template/

Tool B. SMART Goal and Objective Worksheet

Instructions: Work through this worksheet, including as much detail as possible under the heading in each columns. When you have completed the worksheet you will be able to write SMART goals and objectives for your needs assessment.

Goals and Objectives					
Intention	**Specific**	**Measureable**	**Attainable**	**Relevant**	**Time Bound**
What is it that you want to achieve?	Who? What? Why? Where? When?	How much? How often? How many?	Achievable? Feasible?	Is it important to what you ultimately want to achieve?	When will goal be reached?

Tool C. Needs Assessment Timeline

Instructions: Use dark shading to show the timeline for each of the six major steps in the process; use light shading in the rows under each step to show the timeline for various activities within each step.

Phase / Description of Activity	Month/Year																	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Step 1. Build Partnerships																		
▪ Identify stakeholders																		
▪ Establish relationships																		
▪ Form a workgroup																		
Step 2. Develop a Plan																		
▪ Identify goals and objectives																		
▪ Define roles and responsibilities																		
▪ Confirm the timeline																		
Step 3. Assess the Population																		
▪ Define the population to be assessed																		
▪ Identify community assets																		
▪ Create community description																		
Step 4. Synthesize Data																		
▪ Review qualitative/quantitative data																		
▪ Review trends/implications																		
Step 5. Envision the Future																		
▪ Create a vision																		
▪ Identify priorities for improvement																		
Step 6. Communicate Findings																		
▪ Draft/vet report with stakeholders																		
▪ Develop a dissemination plan																		
▪ Implement plan to share findings																		

Tool D. Assessment Report Checklist

Use this checklist to be sure that the following information is included in the final report from the needs assessment:

☐ **Title Pages, Table of Contents, and Acknowledgments**

- ☐ List of core team members and/or the organizations they represent, as well as their contributions toward the needs assessment

☐ **Executive Summary**

- ☐ Provide a brief overview and description of the population assessed, as well as the health, social and environmental issues identified during the assessment. The executive summary should be brief enough so that it can be easily reproduced for distribution to key stakeholders, but long enough to clearly convey the most important findings from the needs assessment.

☐ **Chapter 1. Background and Introduction**

- ☐ Describe the rationale for conducting the needs assessment.
- ☐ Comment on the collaborative relationship between the public health agency and the organizations represented on the core team.
- ☐ Describe the process used to establish the core team, including information on stakeholder identification and/or mapping and recruitment of the core team members from the broader list of stakeholders.
- ☐ Describe how the core team functioned during the process (e.g., committees, subcommittees, roles and responsibilities).
- ☐ Discuss how key partnerships were formed or strengthened during the process.

☐ **Chapter 2. Brief Description of Population or Community**

- ☐ Geographic: Describe the defined geographic area that is covered in the needs assessment (e.g., entire state, select counties or regions).
- ☐ Historical: Describe any historical information that could be relevant to understanding health status or health behaviors of the population.
- ☐ Demographic: Describe the population by key variables (as available) such as age, race, ethnicity, gender, urban/rural/suburban, educational attainment, household income, language, etc.
- ☐ Environmental Context: Include information about any economic, political, environmental and/or social conditions that could be relevant to understanding the health status or health behaviors of the population.

☐ **Chapter 3. Data Collection Process**

- ☐ List data sources and data sets used in the assessment.

- Describe the process used to collect primary and secondary data, and briefly review any tools (e.g., questionnaires, interview guides) used. Include copies of any tools in the appendix.
- Outline the process used to analyze or synthesize the data.
- Discuss the method used to set priorities.

☐ **Chapter 4. Data Results and Interpretation**

- Describe the overall health status of the population, and needs of the population based on the data collected during the assessment.
- Describe assets and resources available to address relevant issues among the population.
- Identify gaps between needs and assets
- Use charts, graphs and map, as appropriate, to illustrate key findings.

☐ **Chapter 5. Implementation and Vision**

- Identify and discuss most highly prioritized issues/gaps in the population
- Summarize the results

☐ **Chapter 6: Communication Plan**

- End the report by communicating the actions that will be taken to address the needs identified during the assessment, including, as appropriate:
  - What practical alternative(s) could be pursued to address this gap/issue?
  - What are the barriers to doing so?
  - What major initiative should be pursued to move ahead?
  - What specific actions (with existing resources) should be taken right now? What are other resource implications – e.g., if new funds are secured or current funds lost?
  - What additional steps (6 months - 1 year from now) should be taken?
  - How does the action rank in terms of acceptability to key decision-makers and stakeholders, impact on the agency and its partners, integration/alignment with other strategies and activities, technical feasibility, cost-effectiveness, long-term impact, timing, or other criteria?

Tool E. Communication Planning Template

Instructions: Work through this worksheet, including as much detail as possible under the heading in each columns. When you have completed the worksheet you will have the information necessary to guide communication strategies with stakeholders.

Stakeholder	What	When	How	Who
Identify the name of the individual stakeholder and/or organizational affiliation	Describe what needs to be communicated (i.e., results of assessment)	Indicate the start and/or end date(s)	Describe the communication method (i.e., presentation to stakeholders)	Indicate the person or organization responsible for ensuring this communication is completed

Tool F. Press Release Template

[Insert logo(s) here]

<div align="right">

FOR IMMEDIATE RELEASE
Contact:
Phone:
E-mail:

</div>

[Name(s)] Shares Initial Findings from Needs Assessment Related to Alzheimer's and Other Dementias

Location – [Name(s)] have completed a major milestone in their efforts to define the needs of persons with Alzheimer's and other dementias and their caregivers. The preliminary findings from the needs assessment represent several months of research collecting and analyzing data. The assessment includes [specify community area(s)].

The last needs assessment related to Alzheimer's and other dementias was conducted in [year] - or - [This is the first time that XX has conducted a needs assessment specifically related to Alzheimer's and other dementias]. With these new data, health officials have the information needed to [develop and implement a state plan for Alzheimer's and other dementias] - or - [incorporate issues related to Alzheimer's and other dementias into the state plan for chronic disease, falls prevention, healthy aging, etc.], with the goal of improving health and guiding future decision making based on the strengths and needs of the community.

For more information and to view the results of the needs assessment, please visit www.[insert web address] and/or contact:
[Name]
[Email]
[Phone]

###

[Insert Boilerplate(s)]

Tool G: Needs Assessment Checklist

- ☐ 1. Partner
    - ☐ a. Identify internal and external stakeholders (Tool A: Stakeholder Analysis Matrix)
- ☐ 2. Plan
    - ☐ Articulate needs assessment goals and objectives (Tool B: SMART Goal and Objective Worksheet)
    - ☐ Identify and convene core team
    - ☐ Consider a project charter for added structure
    - ☐ Establish a timeline (Tool C: Needs Assessment Timeline)
- ☐ 3. Assess
    - ☐ Identify data categories requiring data collection (e.g., prevalence and disparities, mortality, caregiving, modifiable risk factors, costs, assets and resources)
    - ☐ Identify state and national data sources
    - ☐ Identify data methods (quantitative and qualitative)
    - ☐ Identify community resources and assets
- ☐ 4. Synthesize the Data
    - ☐ Compile results of data collection
    - ☐ Convene partners to interpret preliminary results as a group
    - ☐ Identify questions to pose to the group
- ☐ 5. Envision the Future
    - ☐ Convene partners for a visioning process
- ☐ 6. Communicate Findings for Action
    - ☐ Prepare a written report to communicate needs assessment methods and results (Tool D: Assessment Report Checklist)
    - ☐ Develop a communications plan (Tool E: Communication Planning Template)
    - ☐ Develop supplemental communication materials (e.g., infographics)
    - ☐ Share results with the media (Tool F: Press Release Template)