



Community Needs Assessment Planning Guide

A practical framework for understanding needs, assets, gaps, and priorities

A credible needs assessment considers both needs and assets. It combines data with lived experience and connects findings to decisions.

Step 1: Define the Assessment

- Identify the population or community being assessed.
- Define the geographic area.
- Clarify the decisions the assessment should inform.
- Identify the primary audience for the findings.
- Set the timeframe, leadership team, and available budget.

Step 2: Build the Data Inventory

Data Category	Examples	Already Available	Need to Gather
Demographic	Age, race/ethnicity, income, education, household composition, geography		
Community conditions	Housing, transportation, safety, health, employment, internet access		
Participant or client	Enrollment, service use, outcomes, satisfaction, barriers, referrals		
Program and service	Capacity, eligibility, waitlists, utilization, cost, outcomes		
Financial and resource	Funding sources, program costs, sustainability, grants, assets		
Stakeholder insight	Survey, interview, focus-group, partner, staff, and community feedback		

Step 3: Identify Stakeholders

- People directly affected by the issue
- Current participants or clients
- Potential participants who are not being reached
- Community partners and referral sources
- Staff, volunteers, and board members
- Funders and public agencies
- Subject-matter experts and advocates

Step 4: Gather New Information

Choose methods based on the questions being asked, the population, available time, accessibility needs, and resources.

Method	Best Used For	Important Considerations
Survey	Broad input and measurable patterns	Keep it short, accessible, and available in relevant languages.
Focus group	Detailed experiences and shared themes	Use a neutral facilitator and protect confidentiality.
Interview	Expert, leader, or lived-experience insight	Use consistent questions and document themes.
Community forum	Public discussion and priority identification	Provide clear ground rules and multiple ways to participate.
Administrative data	Utilization, outcomes, trends, and gaps	Check definitions, date ranges, completeness, and limitations.

Step 5: Analyze the Findings

- Compare findings across data sources.
- Identify recurring themes and significant differences among groups.
- Distinguish symptoms from root causes.
- Identify existing strengths, services, relationships, and assets.
- Examine financial and organizational capacity.
- Document data limitations and unanswered questions.

Step 6: Prioritize Needs and Strategic Issues

Rate each issue using agreed criteria such as size of the need, severity, equity impact, mission alignment, feasibility, available resources, urgency, partnership opportunity, and potential impact.

Issue	Magnitude	Severity	Mission Fit	Feasibility	Equity Impact	Priority

Step 7: Connect Findings to Action

- Confirm which needs the organization is positioned to address.
- Identify services, strategies, partnerships, or policy changes required.
- Estimate financial and staffing implications.
- Define outcomes and measures.
- Assign owners and timelines.
- Communicate findings back to stakeholders.
- Establish a schedule for updating the assessment.

Recommended Final Report Structure

1. Executive summary
2. Purpose and scope
3. Community or population profile
4. Methods and data sources
5. Needs, assets, and service gaps
6. Stakeholder findings
7. Priority issues
8. Financial and organizational implications
9. Recommendations
10. Measures and next steps
11. Data limitations and appendices