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| **TOOL SUMMARY: NEEDS ASSESSMENT PLANNING** |
| Purpose | The purpose of this tool is to help the needs assessment team plan for the assessment so that the most relevant data is collected in the most efficient manner.  |
| Information Sources | **Information the assessment team should have before planning for the assessment:*** Geographical scope of the target population
* Information on the demographic make-up of the population, including importantly any marginalized groups.
* Core program area models.
* Relevant technical frameworks or approaches (resilience, food security, etc.)
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| Who | One person from the project design team should lead the planning process. Once planning is completed and tools and methodologies have been developed, people familiar with the use of PRA and RRA methods should be assigned to gather the necessary data.  |
| When | The Needs Assessment is normally the first step in the project design process. * Information gathered is used primarily to help conduct the Problem Analysis.
* It can also be used in other areas of the Project Proposal, such as the project background and information on partner or local institution capacity.

A well thought out plan for conducting the needs assessment should be completed before any data collection begins. This will help ensure that only essential data is collected.  |
| Requirements | **Requirements*** The plan must outline the resources and time necessary to collect all the data needed to triangulate the answers to the assessment questions.
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| **Recommendations*** Filling out the tables in this tool is NOT required, but it is recommended.
* The plan should consider all relevant subgroups of a target population, and should also examine the relationships between these groups.
	+ These groups include, but are not limited to, men, women, girls, boys, different socioeconomic groups, different ethnic groups and marginalized groups such as the elderly or disabled.
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| Tips | * Use the CRS Guidance on Participatory Assessments and Learning for Gender Integration Manual (forthcoming) to help plan for needs assessments for development projects.
	+ For assessment in emergency contexts please contact the LWR EOPS unit for guidance.
	+ Visit <http://www.needsassessment.org/> for an abundance of resources on needs assessment.
* The Needs Assessments, Problem Analysis and gender constraints analysis can overlap.
	+ Your first round of data collected can be used to complete a first draft of the problem analysis. When conducting the problem analysis some causes may be unclear in which case you may need to collect more information.
* There are two main reasons for conducting separate interviews, group interviews, and focus group discussions with men and women:
	+ When you want to be able to compare the different responses from men and women. If you want to understand the different constraints men and women face in participating in training, it is helpful to interview men and women separately and then compare their responses.
	+ When social norms restrict men and women from being in the same room or expressing themselves in front of each other.
* It may be necessary to consider further disaggregation of groups based on other characteristics, like age or ethnic group.
* It is not necessary to use every tool with men and women in separate groups. For example, general information about the composition of communities or the composition of producer groups can be gathered from mixed groups or official records.
* Do not confuse information about women-headed households with information about individual women.

\*From CRS NA Guide, PG. 6 |
| Gender Considerations | A project that meets the LGI standards for gender integration at this stage will undertake all of the following:* Consults secondary data sources on gender issues in the targeted area and/or sector including but not limited to:
	+ National statistics;
	+ Existing gender analyses from other projects, donors, etc.
	+ Other development literature on the social context.
* Conducts primary data collection in the target area from men and women, girls, and boys
* Organizes and triangulates primary and secondary data from men, women, girls and boys
* The needs assessment should provide evidence of:
	+ Women’s and men’s roles at different levels including the household, the community, and other groups or associations (what do people do);
	+ Women’s and men’s decision-making roles in households and communities;
	+ Women’s and men’s access to resources and services;
	+ Women’s and men’s needs and interests;
	+ Beliefs and norms about men and women; and,
	+ How laws, policies, and institutions establish (or not) an equitable environment for men and women.
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| **NEEDS ASSESSMENT PLANNING TABLE** |
| Name of Needs Assessment Lead: |
| Budget for assessment:  |
| Time available or required for the assessment:  |
| Logistical support required:  |
| **Step 1: Why?**  |
| **Step 2: What?**  | **Step 3: How?**  | **Step 4: Scope?**  |
| **Objective 1:**  |
| **Question 1.1:**  |   |   |
| **Question 1.2:**  |  |  |
| **Question 1.3:**  |  |  |
| **Objective 2:**  |
| **Question 2.1:**  |  |  |
| **Question 2.2:**  |  |  |
| **Question 2.3:** |  |  |

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| **ASSESSMENT METHOD/SOURCE OUTLINE** |
| **Name of method and/or information source:** | **Questions Covered:**  | **Who:**  | **Additional considerations:**  |