

# NOT ANOTHER SURVEY

## A Look at Issues in Assessing The Community Needs of the Aging



UED 49/300/1978

University of Missouri-Columbia

Extension Division



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# Preface

This guideline for needs assessment is part of the 1977-78 follow-up of Area Aging Training Projects by the University of Missouri Social Work Extension Program.

Consultation regarding the feasibility of the needs assessment of older persons is available upon request from the Extension Program, School of Social Work, University of Missouri-Columbia. Professionals there also can suggest sources for technical consultation for implementing the assessment.

TA grant from the Missouri Office of Aging made this project possible. Full responsibility for these contents are accepted by the writer. However, consultation and critical reviews generously were furnished by:

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Jean Leonatti, Assistant Director, Central Missouri Area Agency on Aging, Columbia.

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Their thoughtful suggestions are deeply appreciated.

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July, 1978*

*Introducing each chapter are three views of the elderly by Art Teoli. They were completed as part of the "Living is for Now" project, under the direction of Art McArthur, associate professor, Child and Family Development, College of Home Economics, University of Missouri-Columbia.*

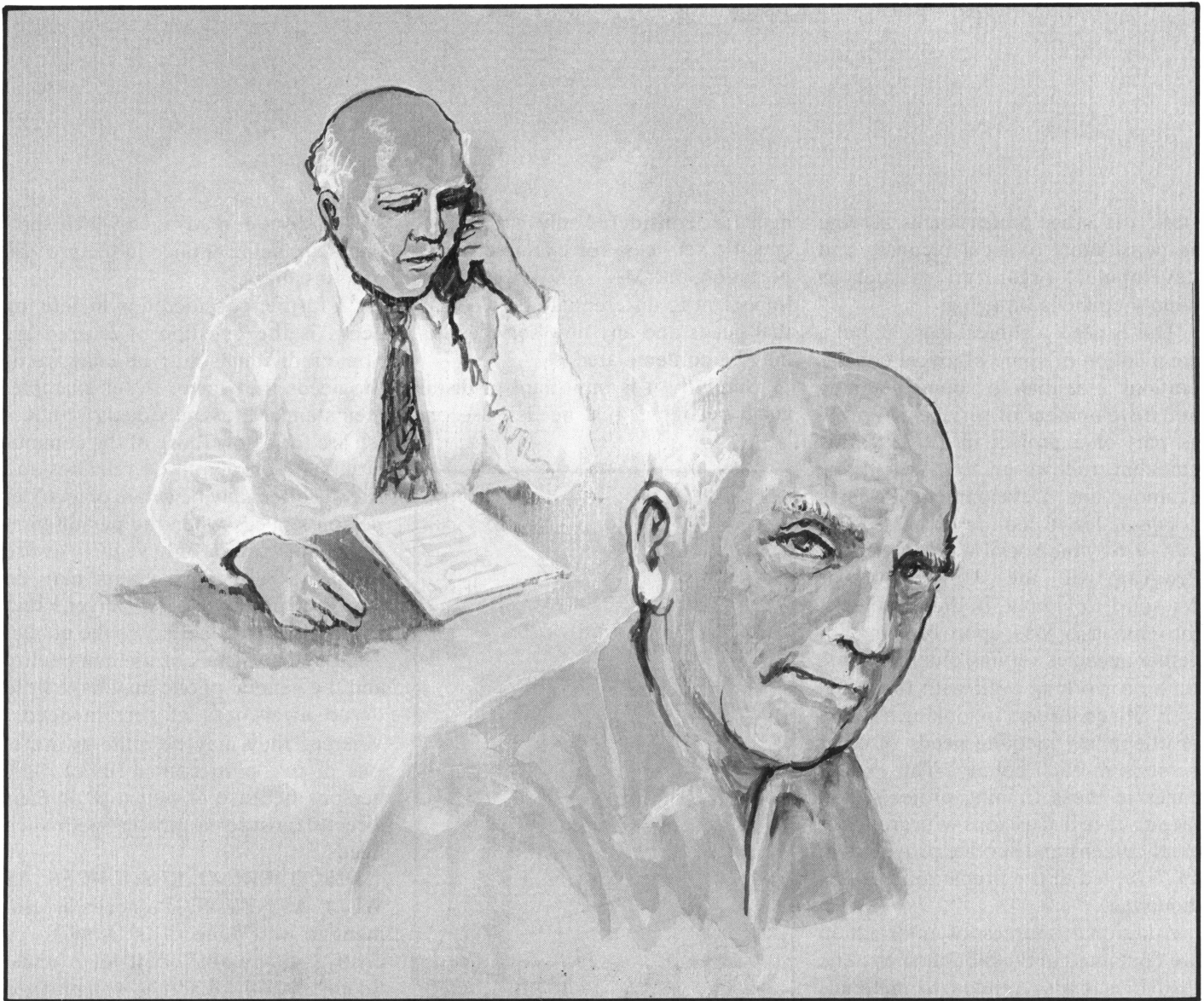
*Cover and all other artwork were done by Tom Nelson, graphic artist, Department of Food Science and Nutrition, College of Agriculture, University of Missouri-Columbia.*

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# **Needs Assessment in Community Planning and Development of Services For the Aging**

## **Purpose of Guideline**

Intended as a practical working tool, this guideline reflects a philosophy of community programs of and for older persons. This philosophy places highest values on community-wide citizen participation in project planning and decision-making.

This publication focuses on local or community-centered programs. It is intended to provide a foundation for local planning and development, especially in out-state counties. However, an adaptation of this guideline also could well be used in metropolitan areas.

Possible audiences include the staff of Area Agencies on Aging, (AAA) University of Missouri Extension

staff, and other professionals serving as consultants to local planning and development organizations such as county councils on aging.

This is not a technical manual, but a compilation of some practical considerations essential to sound planning and development of services. Written as part of a project in 1977-78, this guideline follows up the Area Aging Training and Development Projects conducted in 35 counties in 1974, 1975, and 1976 by the Social Work Extension Program of the University of Missouri-Columbia. In these projects, the emphasis was upon bringing together agencies serving older persons, then on working both with them and with citizen leaders in looking at ways of effectively meeting needs of older persons in each county. The experiences in these training projects, and face-to-face discussions with groups of local citizens and service providers in 1977-78, led to the preparation of this guideline.

Additional sources of information are contained in the bibliography. The guideline is also related to materials available from the Missouri Office of Aging, particularly the resource guide, "Organizing Your Local Group on Aging," and the forthcoming reports of the 1977-78 statewide needs assessment project, conducted by the Missouri Office of Aging and the various AAA's.

## Some Basic Assumptions and Principles

**DIFFERING PERCEPTIONS OF "NEED."** A standard dictionary definition of need is, "an urgent requirement of something essential or desirable that is lacking." However, in examining needs in relation to community planning and development, one should consider not only lacks or deprivations that an individual might have, but also aspirations. Sometimes

needs are considered only in relation to specific services, for example, transportation, or "Meals on Wheels." It is important to differentiate between actual needs and any new services that may be contemplated.

Similarly it is important to distinguish between "real needs" as com-

should decide in advance which standards are being applied in the process of assessment.

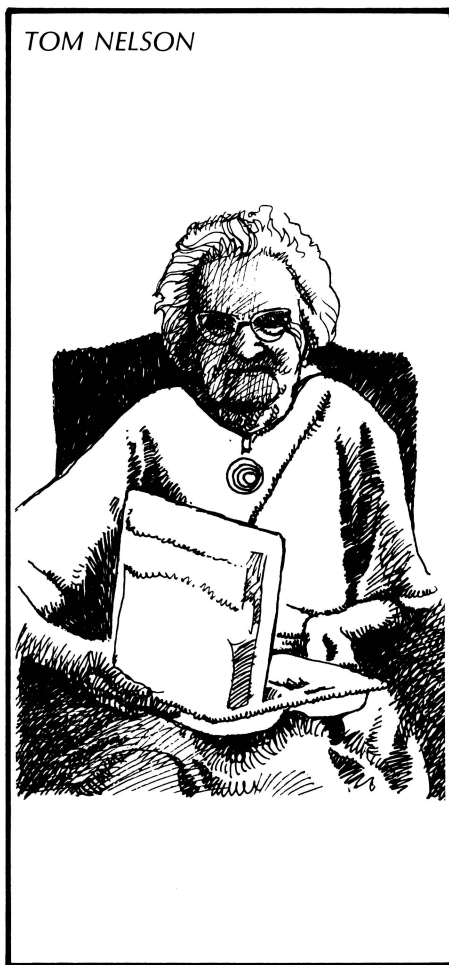
A further consideration in defining needs is the question of *awareness*. Some individuals may be unaware of the needs they have, if, for example, their standards as individuals for housing are far below those of the community, state or nation. Or relatives and friends often may be aware of an older person's needs when the person himself is unaware or only vaguely aware of them. Service providers may be aware of needs of older persons that are not known generally to the public. The public officials of the community and the general public may have little or no awareness of certain needs, whereas they may be quite aware of one or two particular needs of older persons because of publicity or their direct exposure to persons with such needs.

**DISCOVERING RESOURCES AS WELL AS NEEDS:** If a needs assessment is well done, it is likely to be costly in time and effort, if not in funds. So it is essential that it be well planned and that it produces the data sought.

In the process of planning, bear in mind the two basic groups of older persons—those with needs outweighing their ability or resources to meet them, and those with resources outweighing their needs.

It is as important—for the community at large—to discover the talents of older persons as it is to discover their needs for services. Too frequently today older people are unable to realize their personal aspirations and to use their abilities. Many individuals over 60 may be employed, or potentially employed, full or part-time, and many others certainly may potentially be available to volunteer for services in organizations such as RSVP (Retired Senior Volunteer Program).

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pared with *opinions* of needs. Different individuals and groups have different perceptions of needs as, for example, in relation to personal living arrangements and housing. Moreover, standards vary considerably among the community, state and national levels. In considering assessment of housing needs then, the planning organization

In the age group from 60 to 75 (chart 1) more commonly individuals have resources exceeding their needs. That makes them prospects for employment or volunteer programs. As a person's age increases, there is likely to be an increasing need for services—and fewer talents or resources available to provide for them.

home, for example, has no abilities to share with others—or that she has all her needs met because she is in an institutional setting. Yet experience has shown that such “old old” persons may have real talents that can still be shared, even when some of their needs are not being met entirely. Any survey should include the community's “old

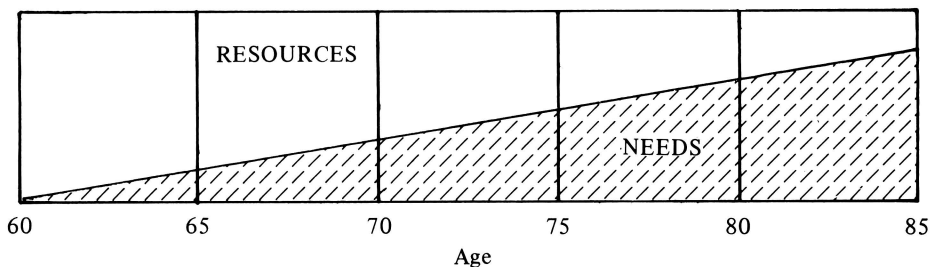
**THE EDUCATIONAL VALUES OF ASSESSMENT:** The educational outcomes of needs assessments are as important as the data. This is because both informed awareness of needs and accurate appraisal of local standards regarding them are essential to gain community support for any new or expanded services that the data may indicate are needed. Similarly, without community support, both moral and financial, even presumed “glaring” needs cannot be met on a sustained basis.

Interview to obtain data about needs from consumers, friends and relatives, service providers and public officials. Using volunteers to conduct the interviews is an excellent way of building community awareness and of measuring community standards regarding needs that should be met. Also, the active involvement of volunteers contributes substantially to the process of priority setting and public interpretation to develop community awareness of particular needs.

For example, people can readily see the need in most communities for older persons to have transportation to a physician. But it is another matter to support transportation for visits to families or friends, since these may not be recognized as contributing to the social and emotional well being of the older person. Therefore, the issue of the extent and nature of needs for transportation has to be carefully explored, both with consumers and with others in the community. It is equally essential to determine just what local standards of needs for transportation there are and what community acceptance there is of various kinds of transportation services.

The volunteers doing the interviewing can observe needs first hand. At the same time they will hear a variety of opinions regarding needs. So their participation is valuable in developing

CHART 1.



Of critical importance are the attitudes and feelings the older persons being surveyed have about themselves. If questions about needs are the only ones in the survey, the proud older person often will minimize or deny his or her needs. If, on the other hand, talents or interests are surveyed along with needs, more open communication should result, and more complete data should be obtained on both needs and talents. The key factor here is the person's self-perception.

As indicated earlier, many older persons may not think of themselves as “aged” or as “senior citizens,” and may resent and resist being so labeled. This relates to the hazard of surveying only those who have certain patterns of identified needs and use of services, such as those persons attending and participating in senior centers and at nutrition sites.

The possibility of overlooking needs and resources of the “old old” or “frail elderly” also should be avoided. Sometimes people assume a frail, 85-year-old widow, living in a retirement

old” whether they are in a group facility, living with a relative, or living alone.

**NEEDS DO CHANGE!** In the course of a few years, substantial changes can occur in the population of older persons in a particular county. Each year individuals become 60, die, move into the county, or move out. And, as the chart shows, individual needs increase with advancing age—in severity and variety.

Frequently, too, status within the family changes, such as moves into or out of a relative's home, death of a spouse, disagreements with family, and economic changes, either for the better or worse. Similarly, standards of needs change, both on the part of the individual and on the part of the community, the state and the nation.

For these reasons, needs assessments must be done at fairly frequent intervals, perhaps every two or three years. That would better assure the available data are up-to-date and essentially accurate.

a corps of citizens who can participate actively in the planning process. Also, such individuals are effective interpreters in the community of both needs and various standards and opinions about needs. For all these reasons, *carefully* select volunteer interviewers for a needs assessment survey. Moreover, as will become evident in considering planning for a survey, it is essential that volunteers have special training.

**WHEN TO UNDERTAKE AN ASSESSMENT:** Some communities have undertaken needs assessments before they were really ready to carry through all the necessary steps. Base-line data and on-going information gathering are essential for the local planning and development organization. And before rational planning and development of services can be done, there must be knowledge available both regarding the specific kinds of needs existing locally and regarding what the community awareness is of them. But before a needs assessment is done, some vital issues should be thought through.

One of the considerations in deciding when to undertake a needs assessment is whether or not the entire aging population is to be surveyed. If an entire county is to be surveyed, with a large number of aging people (2,000 or more), an immense corps of interviewers would be required to do a 100 percent assessment. One alternative would be to survey a random sample. (See "Surveying Community Attitudes," Appendix 3, on how this can be done.)

Another alternative would be to survey one town, one neighborhood, or one or more geographic sectors. Advance planning and careful weighing of options is called for if the decision-making is to be sound.

No needs assessment should be undertaken unless some assurances

exist of being able to provide some additional services to meet the needs found. It would be unfair to consumers to conduct a needs survey when there is not a reasonable expectation of specific services being made available. For example, if questions are asked about transportation needs, those doing the survey should have some assurance that some kind of transportation services can be financed. Thought must be given to the necessary steps *beyond* the survey before the survey itself is undertaken.

**HUMANIZING NEEDS ASSESSMENT:** While it is essential to have expert consultation in designing the needs assessment and in analysis of its data, a human aspect exists for any needs assessment. Gathering, compiling and analyzing data accurately are important. But the *process* of data gathering is also important. It involves a concern for human dignity and a sensitivity to the feelings and attitudes of those who are being surveyed.

The needs assessment should reflect a concern for the well being of *all* older

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persons, not just certain groups or those with obvious needs. There should be concern for the quality of life for all, and for helping all to obtain a fair share in community life. The objective should be to eliminate or minimize barriers to full participation in community life. For some, more active participation may be possible. But others may need services before they can share talents with others in the community. Yet even the frail elderly, as noted earlier, have capacities and talents to maintain and/or develop that should not be overlooked.

The process of data gathering through volunteer interviews itself can stimulate the respondent to participate in activity. For some who are interviewed this will be a means of developing interest in activities that had not previously been considered. Others will find encouragement to move out into self development projects of various kinds.

Older persons should not be fitted into pre-planned service packages. Instead the services should be tailored to meet consumers' specific needs and desires. Of course, these must be reconciled with community standards and available resources. But the aim basically is to improve the quality of life of all older persons in the community.

**NEEDS ASSESSMENT IS A PARTNERSHIP.** In some communities no needs assessment has been done. In others, the process has been left to service providers. In still others, citizen organizations alone have undertaken surveys. Instead needs assessment should be done as a partnership between citizens and service providers. The latter of necessity start with some service bias, depending on the nature of the agency in which they are employed. Similarly, consumers may be unknown to the

providers, and the agency staff's view of consumer needs may be very much affected by the nature of their services and particular professional point of view.

On the other hand, citizens need the expertise and knowledge that service providers have. Many as much as any citizen want to help assess and meet the needs of older persons.

Moreover, consumers themselves should have a prominent part in the needs assessment process. Too frequently such assessments have been done by professional agencies or organizations with little or no participation of consumers or citizen volunteers except on a token basis.

**LOCAL SELF-DETERMINATION:** Each county is unique—different from the other counties in a state. It is important that each county determine for itself the nature and timing of its own needs assessment, depending upon the stage of development of local planning toward service development. Also, it is essential to recognize that each county, and perhaps different communities within the same county, have styles of dealing with human needs that must be taken into account in planning a needs assessment. Those counties that have had prior experience with local needs assessments often are willing to share their experience with other counties. But no two counties are likely to benefit from identical needs surveys.

### **Place of Assessment in Planning for Service Development**

**OPPORTUNISTIC SERVICE DEVELOPMENT:** Too frequently services are planned, initiated and provided over a period of years simply because funds become available from some outside source or local sources,

or because a small group believes a particular service is needed. Such decisions often are made without considering needs assessment as foundation for orderly community planning and service development. Even where a needs assessment is thought of, frequently it is considered as a casual sort of operation epitomized by the phrase, "Let's do a survey."

**ORDERLY SERVICE DEVELOPMENT:** This guideline is prepared with the belief that needs assessment should be the *first* and *basic step* in the process of informed and orderly community planning for service development. In the process of such planning and development experienced community workers believe there are *seven steps* that logically follow each other. Of them needs assessment is the first. It is seldom possible to find short cuts. So an orderly following of the steps in sequence should result in sound planning and service development in most communities. Besides the assessment, the steps are: priority setting, preliminary service design, "interpreting" the design, exploring and committing resources, finalization and monitoring.

Once a needs assessment has been completed in a community, the *second step* is priority setting. That is, careful consideration should be given to selecting the needs that should be met first, assuming that all needs cannot be met at once.

Before a decision is made, the survey findings should be shared with the community, particularly those who provided the information and those who obtained it. In the process of priority setting, opinions should be invited from all who wish to express them. Any new services that are contemplated, of course, should be related to existing services.

The *third step* in planning is preliminary service design. The service design should be based on the needs found, on the related services existing in the community, and on a technically sound service proposal. It should specify exactly what services are to be provided, where they will be provided, to whom, whether by an existing agency or a new agency, and how the services will be coordinated with existing services. Consultation from a specialist in the particular service contemplated, as well as from local service providers, should enhance the soundness of the preliminary service design.

Following the initial service design, a *fourth step* is public interpretation of the design based upon the community awareness found earlier in the needs assessment. In discussing the design with people in the community, vigorous efforts should be made to encourage two-way communication and on-going feedback from citizens and professionals into the planning process. If the public appears to lack understanding of the need or of the proposed service to meet the need, then a widespread program of public interpretation should be conducted.

The *fifth step* in planning is the exploration and commitment of resources. Facilities, volunteers, and funds—whatever is needed—must be made available to implement possible variations of the preliminary service design. First, explore locally and obtain commitments even when additional resources might be needed from state or federal sources.

The *sixth step* is finalization of the service design. It should be based upon information received during the public interpretation of the tentative design above and upon the availability of resources. Then the service program is ready to be launched.

The *seventh and final step* in the planning process is service monitoring. This completes the cycle of planning and development. And it brings the local planning organization back to the first step, which is needs assessment. Then it can be seen how well the new service is meeting the needs found in the assessment.

a period of time is whether more pressing needs may have emerged as the service has become operational.

Also to be considered is whether other services may be needed to enable the new service to be most effective. For example, a homemaker service may be ineffective for some older persons who would require the periodic nursing care of a home health aide, in addition to a homemaker, in order to remain in their own homes. This illustrates the concept that most human services are dependent upon other services to be most effective.

On-going needs assessment is called for if effective community planning is to be done. (As indicated earlier, needs do change, and sometimes rather rapidly). In addition, special surveys often are essential to obtain detailed information on a special need. Or they may be needed in a situation where an unanticipated opportunity for service development occurs. Additional funding made available for a new type of service might be an occasion for a special survey. Another might be a new kind of funding made available for a service already in existence.

An example of this would be passage by the state legislature of a guardianship—protective services law which would enable an adult protective service to be established in any county prepared and willing to move ahead with it. Then, a special survey to determine the number of those requiring protective services would be called for.

Needs assessment should be linked with service use. The fact that a person states a need by no means indicates he or she will use a particular service established to meet that type of need. For example, a person surveyed may express the need for having a hot meal every day, but never use either an existing Meals-on-Wheels program or

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In the process of monitoring, questions should be raised as to both effectiveness of the service (how well needs are met) and its efficiency in providing good quality for the funds expended. The further issue to be considered over

go to the established nutrition site. A survey might show 127 of 250 older persons within a one-mile radius of a nutrition site want a hot meal four days a week. But the planning organization cannot *count* on having 127 people attend the nutrition site, because either a larger or smaller number actually may decide to attend.

In addition to asking people about their interests in attending the site for a hot meal four days a week, discuss with them the circumstances that would be important for them to use the service. This might consist of questions to elicit positive or negative attitudes toward using such a service. Such factors as social status, pride in self-sufficiency, and the like may affect attitudes toward using a service.

It is important for an interviewer to get an idea of the person's perception of himself. Some, for example, do not wish to be identified with older persons' organizations. Non-use of a service also may be due to factors such as lack of suitable transportation. It might also involve whether or not the individual's friends also plan to use the nutrition site. Finally, use of the service could be greatly affected by the method of paying for the hot meals—whether it is conspicuous or inconspicuous.

## Types and Purposes of Needs Assessment

From the foregoing it should be clear that several types of needs assessment are possible as part of the on-going process for development of community services and opportunities for older persons. The choice of one or more at any point in time depends on the particular stage of planning that exists and the particular circumstances in a given county.

In considering what type of needs assessment to select, differentiate the concept of *need* from the concept of *service*. Individuals have needs that may be met by different kinds of services. For example, an older person may need social contacts and creative leisure, and these *can* be supplied by a senior center. The *need* is for social

different purpose, and each may be used by a community, depending on the purposes sought at a particular time.

**COMPREHENSIVE ASSESSMENT:** The comprehensive needs assessment surveys the total population of older persons or a selected sample. It is called for when there is on-going state, area, or county program planning. Such an assessment provides basic information as to *how many* persons have *what kind* of needs, and may also show what kinds of needs are the greatest in a particular geographic area. This type of survey is the major focus of this guideline, because it is essential for long-range planning.

**SINGLE NEED SURVEYS:** At times, a more modest needs assessment or survey is called for in order to determine the extent, distribution, and nature of needs for such essentials as transportation, health and nutrition. Such an assessment may sometimes be done to justify an existing service or to show that a new or expanded service might be justified.

An assessment of this limited scope may also be done to determine if the consumers of a service are satisfied with it "as is," or want change. That is, a survey may be intended to determine the extent to which transportation needs of the older population in a given geographic area, for example, are met by the existing transportation services.

**PUBLIC AWARENESS MEASURES:** In considering needs of the aging population, it is important to learn about the awareness and opinions about such needs on the part of those who are responsible for public interest decision-making in the community. This calls for a systematic effort to measure the extent of public awareness of needs, as well as of the demand for particular services.



contacts and creative leisure, but *not* necessarily for a center *as the* way of having this need met.

Three basic kinds of surveys relate to needs and services. Each has a



## Implementing the Survey

**SOURCES OF INFORMATION:** Several kinds of sources exist in every community from which data for the needs assessment can be obtained. The choice of method to obtain the needed information depends on its being effective with the source being surveyed. In planning a needs assessment, first select the source to be surveyed, then the method to be employed with that source.

**SOURCES OF INFORMATION:**

1. *Consumers:* The most frequently used source of data is the population group in the community over 60 or 65 years of age. This group is assumed to have unmet needs and/or to lack opportunities. So they are actual or potential consumers of services and/or participants in volunteer projects.

2. *Service providers:* Needs may not be reported by the consumers themselves, and even if reported by consumers, may be of quite a different

order than that seen by providers. This source of survey information is important to learn about the perceptions of service providers of the needs of the older persons with whom they are acquainted through their work. It is also important to learn exactly what services each agency provides and how services are used by their various consumers.

3. *Friends and relations:* Sometimes the perceptions of older persons' friends and relatives may be important to have, because their attitudes toward older persons' needs many times affect the individual's decision to use an available service. Whether or not an older person uses a service may depend to a large extent on positive or negative attitudes expressed by their relatives and friends.

Here the factor of local standards may enter the picture. For example, friends and relatives may have lower

standards of housing than the community at large. So an older person might be encouraged by family and friends to stay on in a dilapidated dwelling rather than to move into a new senior housing project.

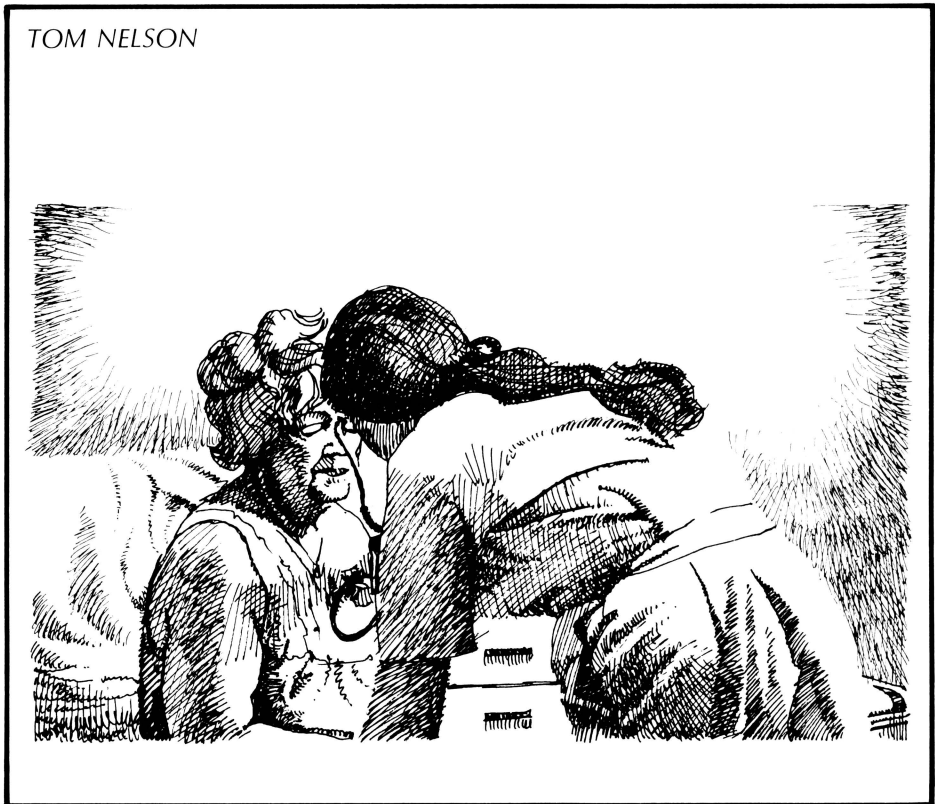
4. *Public officials:* Another group that is important to reach is public officials. County and town office holders are in a position to sanction various services or to provide funding, in some instances. Hence, it is essential to find their general awareness of needs as well as their attitudes and opinions concerning particular needs of older persons.

5. *The "general public":* Still another source of information is the "general public." It sometimes may be useful to get public opinion "readings" concerning particular needs of older persons in the community. This is a way of learning about general awareness of older persons' needs and about local standards for such services as housing, transportation and nursing homes.

**METHODS OF OBTAINING INFORMATION:** 1. *Face-to-face interviews:* This is the best method for assessing consumer needs. The trained interviewer, using a carefully prepared schedule of questions, can obtain complete and reasonably accurate information from the older person.

This method also is most effective in surveying friends and relatives of older persons, public officials, and service providers. Although it requires careful planning and is time consuming, this is the method of choice in needs assessment where complete and accurate data are wanted.

The *place* where face-to-face interviews are held is important. Particularly in the case of consumers the interview should take place in the person's home. A method used occasionally is to *interview persons at*

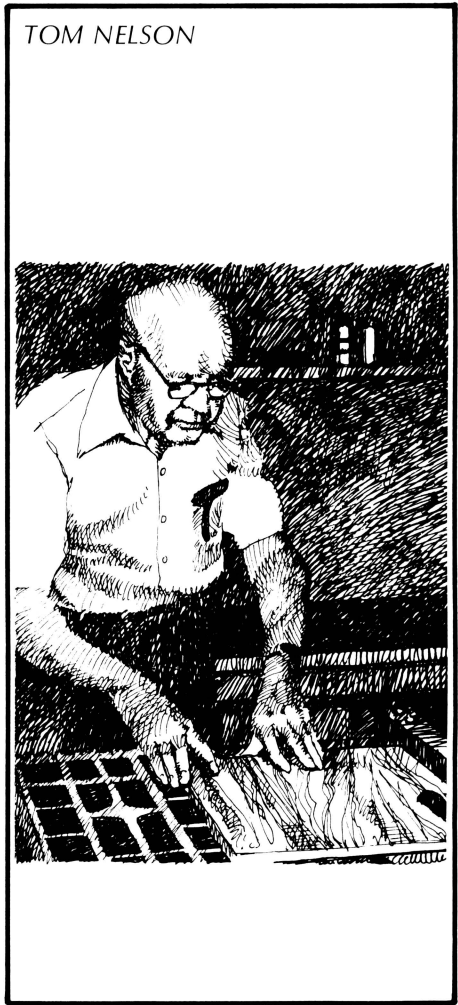


*senior centers, nutrition sites, or other service locations.* This may be useful in obtaining some indication of consumer reaction to the particular services. But it is a very small proportion of the total aging population in any given geographic area. Therefore, it is not a good sampling of the total aging population. (Estimates are that fewer than five percent of the aging population use these services.)

2. *Telephone surveys:* This method can be a useful way of obtaining opinions on selected issues from a sampling of the "general public." Its uses, however, are quite limited.

For assessing needs of consumers this method has the disadvantage of not reaching those persons without a telephone or those who may be away from home much of the time. It also omits that part of the population who may not be living at home, but in a boarding home, a nursing home or spending days with a relative.

3. *Newspaper surveys:* Although this method has been tried in a number of places, the results in reaching consumers have been disappointing. A small proportion of responses has been received, and many responses turn out



to be incomplete and inaccurate. The newspaper survey has the obvious limitation, too, of reaching only those who read a newspaper and who are interested enough to respond to the survey. The method has some value in getting a crude sampling of "general public" opinion on issues relevant to older persons' needs and services for them.

4. *Mail surveys:* For reaching a representative sample of consumers this method has similar disadvantages to the newspaper. Usually the number of responses from consumers is small and may or may not reflect needs of the total group of older persons in the area. The mail survey can be effective in reaching service providers with a carefully designed questionnaire, but requires follow-up to obtain a high percentage of responses. The face-to-face interview is preferable with service providers.

Mail surveys may produce some usable data from a carefully selected sample of the "general public." Efforts to obtain general public opinion may be made less difficult and expensive by selecting for interviews some key persons who are known to be influential in the community. Such persons are often referred to as opinion makers. Here again gauging public attitudes toward certain needs as well as toward certain services may be useful in the process of needs assessment.

5. *Other methods:* Two other methods may prove useful for selected purposes. Sometimes small informal group interviews with consumers may provide useful reactions regarding particular services—existing or proposed. Such group expression enables a rough measure of attitudes that supplement attitudes expressed in individual interviews.

A public meeting may be called to obtain opinions and attitudes about

proposed or existing services. Representatives of affected organizations and groups may be invited to express the opinions of their constituencies. Such meetings give clues as to community attitudes and standards regarding older persons' needs and services to meet the needs. All interested persons should be invited to express an opinion.

## Subject Areas for Needs Assessment

Most communities usually will want to undertake either a limited or comprehensive assessment of consumer needs for services and opportunities. Other assessments (with service providers, local officials, etc.) can be based on subject areas selected from those explored in consumer needs assessments.

If a comprehensive needs assessment is being done, there would of course, need to be some demographic data, such as the older person's age, place of residence, number in household, etc. Beyond these, however, nine subject areas should be covered in a comprehensive needs assessment. (See Appendix A for examples of specific questions which might be used under each of the nine categories. Also see Appendix C, "Some Needs of Older Persons.")

1. *Self-realization and development* (the individual's aspirations in work and leisure time): Such concerns as securing employment, undertaking activity in various kinds of volunteer projects, for spiritual expression, and for educational development might be covered.

2. *Personal/social relations:* These would include relationships with the family, in the neighborhood and community. Also included are the extent of social contact as compared to social

isolation, and the general emotional state (optimistic vs. pessimistic, cheerful vs. depressed), of the individual.

3. *Income status*

4. *Living arrangements,* and desires for changes in living arrangements.

5. *Health,* including availability and needs for dental care and medicines as well as medical care.

6. *Food needs,* nutrition needs, buying problems.

7. *Transportation* needs and specific kinds of transportation called for.

8. *Needs for legal and/or tax counseling and information,* including consumer protection needs.

9. *Knowledge and use of existing service programs* in the community available to older persons.

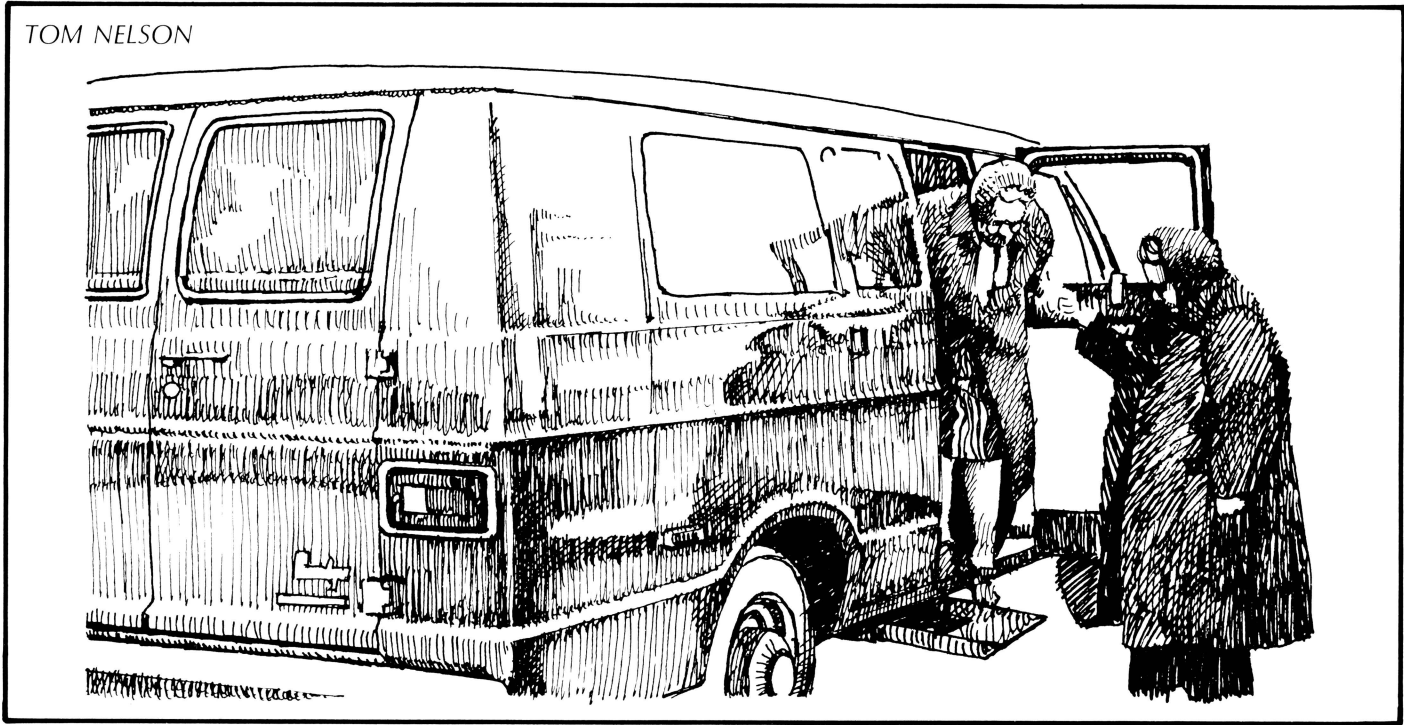
Many communities have found it valuable to add to the survey questionnaire, toward the end, a question asking the person to name his/her three greatest needs or priority of needs. Often it is useful, too, to ask the person what he or she considers the three greatest needs of older persons in the county (or smaller area being surveyed).

## Planning, Conducting the Assessment

It is assumed in this instance that the needs assessment is to be conducted by a county council on aging. A common vehicle to conduct the project by a county council would be a task group made up of six to 15 persons, both citizens and service providers and other professionals. The following are suggested steps in the process of planning and conducting the assessment:

1. **Discuss the needs assessment** in the council and decide on the specific purposes to be accomplished. Then appoint the task group.

2. **Obtain specific facts** about prior assessments for this age group in the



county and of existing services to the aging as well as opportunities for them.

**3. Review experiences**, wherever possible, with similar needs assessment done in other counties, particularly the methods used and the outcomes.

**4. Formulate a plan which** would consist of these components:

- Sources of information and assessment objectives for each.
- Survey methods (use technical consultation before finalizing the methods).
- Preliminary survey design including the questions to be asked, the kind of analysis planned of answers to questions, and the possible outcomes in future service development.
- Staffing the survey, that is, the number and kind of volunteers needed.
- Training plan for the volunteers—who does it, the time, the place.
- Data tabulation and analysis—how it is to be done and by whom.
- Public interpretation of finding—how, by whom and where.

- Utilization of findings in service planning and development.

**5. Make essential clearances** with the county council, with county and other community officials and with related agencies, and make public announcement of plan.

**6. Prepare draft** of survey instrument and pre-test it, especially where there will be a large number of respondents. If a large-scale survey is planned, technical consultation should be obtained before the survey instrument is finalized. Technical assistance also will likely be needed when the survey results are tabulated and analyzed.

**7. Revise the instrument** and instructions based upon the experiences in the pre-test.

**8. Train the volunteers.**

**9. Conduct the survey.**

**10. Tabulate and analyze results.**

**11. Publicize the results.**

**12. Convey the findings** to the county council on aging and then to the task force of the council which has been assigned responsibility for implementing the service development indicated by the assessment findings.

**13. Write a narrative summary** of what was done in the assessment, the methods used and why, and suggestions for those doing future surveys to follow up this needs assessment.

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# Appendix A

## Comprehensive Needs Assessment

### Sample Questions

#### SOME COMMON ERRORS

The most frequent errors in questions on human need survey questionnaires are those which are "leading" or slanted, ambiguous or demeaning questions. The following examples were prepared to illustrate these common errors, followed by a sample question which is designed to avoid the error. All are fictitious, but are similar to ones that *have* been used in community human needs surveys.

It should be stressed that *training of volunteer interviewers* is as essential as well worded questions. The best designed question can elicit inaccurate or incomplete information if asked in a way that conveys attitudes reflecting a lack of acceptance of the person interviewed. For further information on both the training of interviewers and the designing of questions, consult Appendix B. For sources of individual consultation on these two matters, the Social Work Extension Program of the University of Missouri-Columbia can suggest possibilities.

**LEADING QUESTION:** (A prior question re: food needs reveals that the person rarely has a hot meal.)

**WRONG:** "Wouldn't you like to attend our nice, new dining center?"

**BETTER:** "Would you be interested in considering attending a special dining room for older persons?"

(If persons say, "yes," then follow up with questions as to what circumstances would be important for that person to attend.)

**AMBIGUOUS QUESTION:** (Person responding may not understand what is meant.)

**WRONG:** "Do you feel the need for more social contacts?"

**BETTER:** "Many older persons like to have more informal social activities, some with persons their own age, some with younger people, some with chil-

dren. Have you considered whether or not you might like more social activities?"

(If person says, "yes," then follow up with questions as to *kinds* of social activities the person has thought of having.)

#### DEMEANING QUESTION

**WRONG:** "Do you need help in budgeting your money?"

**BETTER:** "Many older persons have a very limited income and may have problems in budgeting their money to take care of their needs. Do you ever have problems of this kind?"

(If person answers, "yes," then follow up with questions as to person's interest in learning with a group or alone about helpful ways to manage on a limited budget.)

#### SAMPLE QUESTIONS\*

##### 1. SELF-REALIZATION AND DEVELOPMENT

- Are you retired? (Yes, No, Partially)
- (If *yes*) when did you retire? (Year \_\_\_\_\_)
- Can you tell me what you mean by your retirement?
- Are there paid or volunteer jobs you have considered taking since you retired? (Yes, No)
- Would you be interested in finding out about paid or volunteer jobs available? (Yes, No)
- Would you be interested in finding out about paid or volunteer jobs available? (Yes, No)

##### 2. PERSONAL/SOCIAL RELATIONS

- Do you see and visit people as often as you wish, or would you like some

\*Many of these are taken from the Montgomery County (Md.) Older Americans Status and Needs Assessment Survey.

assistance in meeting people, going places, or doing things? (Enough; desires assistance; not enough contacts, but doesn't want assistance.)

##### 3. INCOME STATUS

- How well does the amount of money you have take care of your needs—very well, fairly well, not very well, or not at all? (If response indicates "not very well" or "not at all," then a question as to person's interest in getting information about possible sources of income would be appropriate.)

##### 4. LIVING ARRANGEMENTS

- Considering everything, how satisfied are you with your present home? (Read list—very satisfied, somewhat satisfied, somewhat dissatisfied, very dissatisfied.) (Several follow-up questions can be used, such as one related to person's interest in moving, type of housing desired, location, etc.)

##### 5. HEALTH

- Do you have any problems getting medical or dental care? (Yes, No)
- (If *yes*): What are those problems? (Don't read list, but circle all that apply—No doctor (or dentist) available • Can't afford medical (or dental) care • Difficulty with transportation • Don't know where to go • Can't get there because of physical condition • Can't get a doctor (or dentist) to treat me • Can't get a doctor to come to my home • Other (Specify) \_\_\_\_\_)

##### 6. FOOD NEEDS

- How many meals a day do you normally eat? (5, 4, 3, 2, 1, snacks when necessary, no usual routine)
- Do you have any problems in eating, or getting enough to eat, or eating regularly? (Yes, No)
- (If *yes*): Would you mind explaining?

**7. TRANSPORTATION**

- In general, does lack of transportation keep you from doing things you need or would like to do? (Yes, No)
- (If “yes”): Would you mind explaining?

**8. NEEDS FOR LEGAL AND/OR TAX COUNSEL**

- Are you able to get legal or other professional advice when you need it about such things as your will, your taxes, or your rights to pension benefits? (Yes, No)
- (If “no”): Would you mind explaining?

**9 KNOWLEDGE/USE OF EXISTING SERVICE PROGRAMS**

Interviewer says, “I’m going to read a list of programs provided for older persons in \_\_\_\_\_ county. I would like to know—for each program—if you have heard of that program.”

<i>Programs available</i>	<i>Yes</i>	<i>No</i>
Home Health Service		X
Senior Center	X	
_____		
_____		

For each program where the person says “Yes,” ask “Do you participate in the \_\_\_\_\_ program? (Yes, No)

- If yes, then ask, “Are you satisfied with what you are getting out of the \_\_\_\_\_ program?” (Yes, No)

(Further questions, of course, can be added to find what dissatisfactions there may be with programs and why certain programs are not being used.)



## APPENDIX B

### Selected References

**Note:** The following list contains a few basic items that are readily available. It is not intended to be comprehensive.

1. **Cook, James B.**, *Considering Professional Consultation*, University of Missouri-Columbia Extension Division, Aug. 1977, 3 pp.
2. **Kilfoyle, Sharon** and Rosemary Orgren, *Organizing Your Local Group on Aging*, Missouri Office of Aging, Jefferson City, 1977, 82 pp.
3. **List, E. Frederick**, *Community Attitude Self-Survey*, University of Missouri-Columbia Extension Division, Jan. 1978, 8 pp.
4. **Moroney, Robert M.**, "Needs Assessment for Human Services," in *Managing Human Services*, International City Management Association, Washington, D.C., 1977, pp. 128-154.
5. **University of Missouri-Columbia and Missouri Division of Community Betterment**, *Surveying Community Attitudes* (Manual 108, Dec. 1977), 69 pp.

## APPENDIX C

### Some Needs of Older Persons For Services and Opportunities

**Note:** This list is *not* exhaustive. It contains *some* needs older persons in most locations are likely to have. It is based on several surveys that have been conducted in Missouri and elsewhere. Suggestions for additions are welcomed.

#### 1. SELF REALIZATION AND DEVELOPMENT:

- feeling of identify as a person
- education opportunities: at home or at school/college
- volunteer activities (two-way benefits)
- vocational re-training and counseling
- recreation opportunities
- participation in civic activities
- library and other sources of large-printing reading material

#### 2. PERSONAL-SOCIAL (basically, feeling of self esteem and feeling needed and wanted by others):

- friendly visiting
- telephone reassurance (daily)
- social activity outside home
- professional counseling on personal needs and problems
- convenience and visibility of shopping facilities
- spiritual contacts, in or out of home
- maintenance of social relationships
- opportunity to talk about death and dying

#### 3. INCOME (if adequate, *some* other needs would be lessened):

- through private retirement benefits, Social Security, Supplemental Security Income, Veterans' pensions, etc.
- through employment: in home or outside home — full-time or part-time

**Survey errors, most frequently, involve asking:**  
**LEADING QUESTIONS:** Wouldn't you like to attend our nice, new dining center?  
**AMBIGUOUS QUESTIONS:** Do you feel the need for more social contacts?  
**DEMEANING QUESTIONS:** Do you need help in budgeting money?

- help with money management
- protection against consumer frauds
- pre-retirement financial counseling
- positive attitude and ability of adult children or other relations to provide support
- local emergency financial aid
- funds for funeral costs

#### 4. LIVING ARRANGEMENTS

- housing (purchases or rental)
- housing repair (including winterizing)
- housing maintenance
- housekeeping services (including chore or handyman services)
- counseling to older person and family about alternative living arrangements
- boarding home
- retirement home

#### 5. HEALTH

- medical care (including hospitalization when needed)
- periodic health screening
- dental care
- home health care
- medical supplies and equipment
- medicines and drugs
- information about Medicaid and Medicare benefits
- health education, especially that aimed at prevention
- interpretation to family about older person's health needs and care
- day care
- nursing home care

#### 6. FOOD AND NUTRITION

- nutritious meals and balanced diet
- information about nutrition and food preparation
- information about purchase of food
- information about food stamps
- meals with other persons

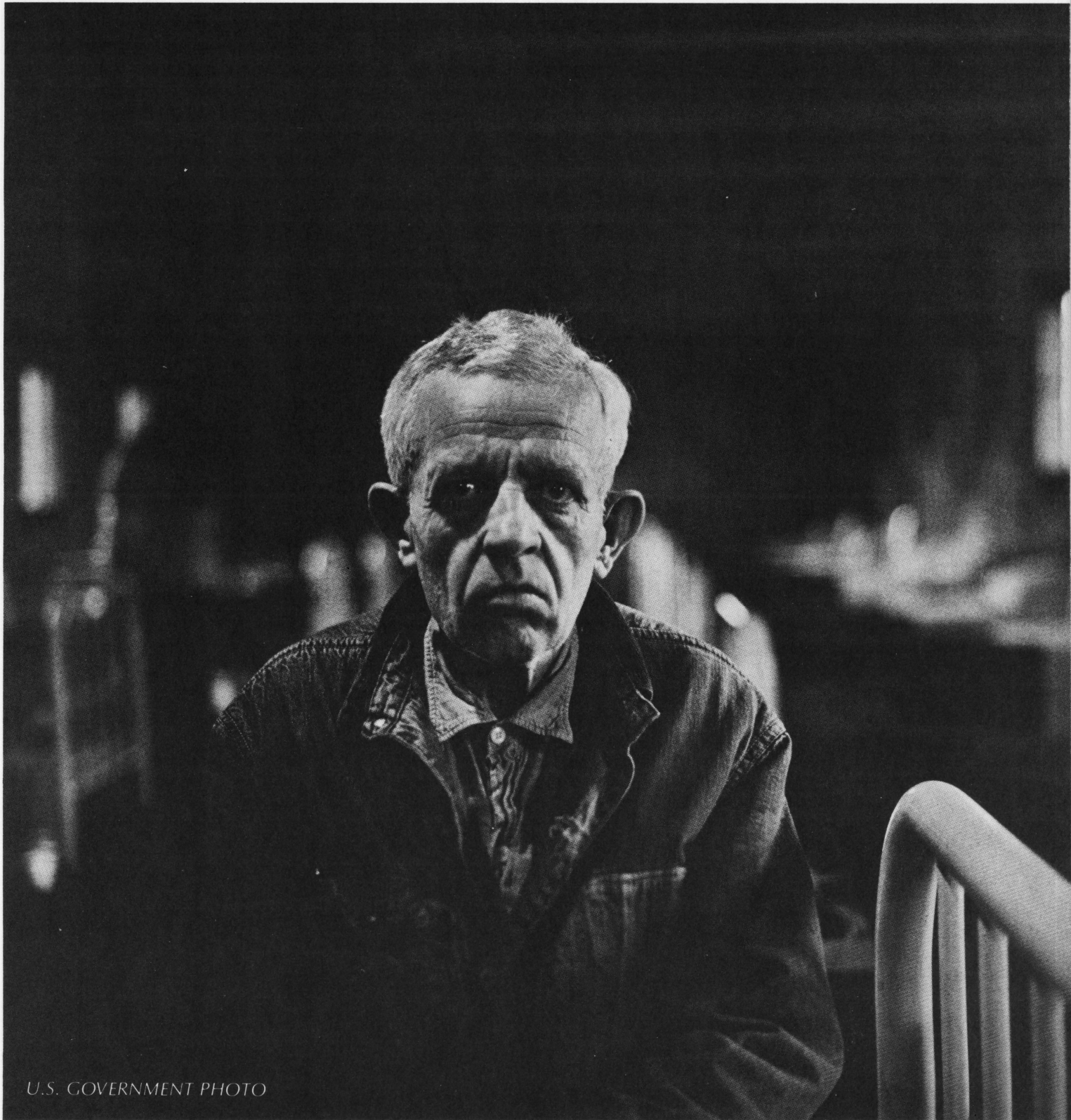
#### 7. TRANSPORTATION

- for health services
- for visits to social agencies, Social Security, etc.
- to attend church
- for personal services (bank, shopping, etc.)
- for visits with friends and relatives
- for recreation activities
- to nutrition sites
- information about availability of transportation services
- ambulance service

#### 8. LEGAL AND TAX COUNSELING

- information about rights to benefits and services
- information and/or assistance in completing tax returns
- information about wills, estates, and related matters
- information about funeral costs and arrangements
- crime prevention information
- information about purchase contracts, credit, insurance benefits, etc.

**This needs list is not exhaustive. It presents some needs older people have, based upon several surveys. Remember, although an older person may not have all of his or her needs met, that person may still be willing and able to help others meet their needs.**



U.S. GOVERNMENT PHOTO

Not Another Survey presents practical considerations intended to implement a philosophy that places highest values on community-wide citizen participation and decision-making. It stresses that older people be considered a resource in implementing a plan to meet community needs.

TOM NELSON



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