A Field Test of a Reading Program Needs Assessment Strategy

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A FIELD TEST OF A READING PROGRAM
NEEDS ASSESSMENT STRATEGY

by

Linda Jane Howard Vingelen

A Dissertation
Submitted to the
Faculty of The Graduate College
in partial fulfillment of the
requirements for the
Degree of Doctor of Education
Department of Educational Leadership

Western Michigan University
Kalamazoo, Michigan
August 1980
DEDICATION

This paper is dedicated to my parents, John and Helen Howard. Their love and guidance has always served as an inspiration to me.
ACKNOWLEDGMENTS

My thanks to Dr. Mary Anne Bunda, chairperson of my committee, for her patience and guidance in helping me complete this study. She rescued me when I was going under for the third time, and I shall forever be indebted.

Also my thanks to my husband, Al Vingelen, for his love and understanding. His support was important to me during the years of commuting to campus, raising three young sons, and continuing to teach in the public schools.

Linda Jane Howard Vingelen
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CHAPTER I

INTRODUCTION

This dissertation describes a needs assessment model for reading and describes the field testing of that model. The needs assessment model is a strategy for conducting a comprehensive and systematic assessment of reading needs in kindergarten through Grade 12. The model can be used as a basis for educational program planning by a director of reading and a school superintendent. A model for conducting a reading program needs assessment was conceived and field tested because there are few available needs assessment models in reading which have been field tested. Field testing is particularly vital because only after implementation of a needs assessment model can it be seen whether the model will provide information it claims to provide. In the field testing, each step of the model was tried out in an actual school system where educational needs in the area of reading were being sought. The model was implemented exactly as written. Results of the field test were then used to modify the model.

A carefully articulated reading program would be difficult to conceive and orchestrate without using a needs assessment. Today most educational leaders recognize continuous useful assessment as an essential ingredient for maintaining an effective reading program. Assigning priorities in such areas as selection of reading materials, choice of in-service topics, or preparation of budget could only be done arbitrarily if a needs assessment were not conducted first. In
addition, allowing decisions based on a reading director's own per-
sonal preferences could be a limiting method of charting a reading
program.

It will be seen that, not only does the literature lack a com-
plete model for conducting a needs assessment, but data do not seem
to be available on the results of conducting an assessment based on
any models. Information from a field-tested needs assessment model
is of value in the selection of one needs assessment model over
another.

Chapter I will provide an introduction to the topic of develop-
ing and field testing a needs assessment model in reading. The terms
accountability, evaluation, assessment, need, needs assessment, and
reading will be defined. The chapter will describe the value of a
complete needs assessment model. Further, this chapter will propose
a reading needs assessment which has been field tested. Finally, an
instrument to evaluate the model will be described.

Definition of Terms

To introduce the developing and field testing of a needs assess-
ment model in reading, terms which have been used will be defined.
Reviewing the literature in this area from the last 15 years provides
a "mosaic" (Worthen, 1974) impression.

Meaningful and concise definitions of the words accountability,
assessment, and evaluation have not always been available. As Bunda
(1979) effectively pointed out, too many definitions of these terms
coexist with no clear consensus. Accountability projects generally
have been the result of concerns which arose in the late 1960's and early 1970's. During these years economic and social upheavals with corresponding tax increases began to affect every aspect of American life (Grady, 1974). Concern arose about the use of dollars designated for education. State legislators reacted to this public concern, so most of the 50 states passed legislation on educational accountability.

Each of 53 states (the District of Columbia, the Virgin Islands, and Puerto Rico were included with the 50 states and for the purposes of the survey are reported among the states) has reported accountability projects either as operational, in development process, or in planning state. (Beers & Campbell, 1973, p. 5)

Accountability, in general, provides for regular collection of data and by definition accountability includes the responsibility of achievement. It does not require that any decisions be based on the collected data. These test gathering exercises focus only on the singular dimension of student achievement. The determination of present status of a reading program can be made more valid by using multiple data sources.

As with the term accountability, the term evaluation was introduced with curriculum projects in the 1960's. As with the word "accountability," too many different definitions of evaluation posed a problem. Unlike the term accountability, however, a standard definition of evaluation appears to have been formalized. Evaluation is defined as a judgment of worth. When people evaluate, they make an estimate or judgment of the worth of some phenomenon (Popham, 1973). Thus, there is consensus that evaluation is a judging process.
Assessment, though confused in earlier definitions with both accountability and evaluation, is a different concept. Assessing needs in an educational program demands establishing meaningful goals, using multiple sources for gathering current information about these goals, and listing areas in which the goals are not met. While evaluation has come to mean judging the worth of a goal, needs assessment tells how close that goal is to being achieved. Assessment is in some ways similar to evaluation. Assessment identifies goals and gathers data on those goals, but assessment lacks explicit judgment of worth, the hallmark of evaluation.

The concept of need defined as a discrepancy was first used by Ralph Tyler in his historic work on the development of curriculum at the University of Chicago. Tyler (1950) wrote:

Studies of the learner suggest educational objectives only when information about the learner is compared with some desirable standards, some conception of acceptable norms, so that the difference between the present condition of the learner and the acceptable norm can be identified. This difference or gap is what is generally referred to as a need. (pp. 5-6)

The work of Kaufman, Corrigan, and Johnson (1969) emphasized the definition of need as relating only to discrepancy in results or outcomes. Today a need is defined as a gap, or a discrepancy between two indices; a future desired condition and the actual condition (English & Kaufman, 1975).

For the purpose of this study, needs assessment is defined as a formal process for identifying outcome discrepancies between current conditions (conditions here refer to more than student outcomes) and desired conditions, placing those discrepancies in order of priority.
and selecting the discrepancy of highest priority for action.

This paper describes a needs assessment model for the reading program. This model was designed to be used for planning that program. For this reason the definition of reading is used in the program planning sense. Typically, the goal of the reading program and the reading process in a school system is for each student to read at the maximum limit of the individual's capacity. In order to achieve this goal, diverse aspects of both the reading program and the reading process must be addressed. Each classroom, school building, and school district involve unique personalities, personality combinations, political power bases, financial resources, community standards, and other factors that interact in the development of reading programs (Smith, Otto, & Hansen, 1978). The reading program, for the purposes of this paper, is defined as the complete set of factors—process, institutional, and human—which establish or enable reading achievement that approaches the limit of each student's capacity. The person responsible for the reading program designed to achieve this goal will be called a director of reading.

Value of Needs Assessment

Needs assessments are undertaken to collect information that would not be explicit unless made obvious through a systematic procedure. It seems four major purposes have influenced schools to undertake such assessments: (a) to plan curricula, (b) to evaluate programs, (c) to account for monies, and (d) to support applications for federal funding of competitive programs. The following is a short
explanation of each of these areas.

As a planning step, needs assessment should be the first step in comprehensive program planning. Curricula can only be assessed in view of goals and purposes (Kaufman, 1974). Needs assessment establishes the direction and focus of basic curricular programs, sets priorities for future development, and gives the basis for allocating scarce resources.

The Center for the Study of Evaluation at the University of California at Los Angeles considers needs assessment as a type of evaluation—indeed, as the first step in evaluation (Klein, Fenster Marcher, & Alkin, 1971). Evaluative information can be gathered in a needs assessment format. As mentioned earlier, state legislatures and local communities have demanded that school districts document their needs and provide a rationale for the way funds are allocated. Unfortunately, most of this evaluative information is gleaned only through collecting results from standardized tests.

Funding is often related to needs assessment. Title III of the Elementary and Secondary Education Act of 1965, which provided competitive funds for innovative educational projects, required a comprehensive needs assessment to justify requests for new programs. Again, these requests involve the gathering of test results as the primary tool to justify funding.

Proposed Needs Assessment Model

A reading program needs assessment model which can be validated through a field test is proposed. This model not only considers
student test scores, but also provides information from multiple sources. These multiple sources will be described more fully in the next chapters. It is noted here that to complete program planning, a director of reading will need more sources of information than just reading achievement scores. Program planning must involve prescriptive selection of materials, personnel choices, and effective utilization of skills of educators at every level of instruction. In addition, program planning might include such considerations as citizen involvement, communication, and quality of instruction.

A reading program needs assessment design which is not committed to these multiple concerns may not be complete. The proposed needs assessment model provides information for total reading program curriculum planning. A structured step-by-step procedure suitable for use by a director of reading services or a curriculum director is outlined. Results from the field test of the step-by-step implementation procedure is described so that reading directors may judge the operation of the model.

After the needs assessment was conducted, the results of the procedure were reviewed and evaluated. In order to provide a system of variables for garnering information about the model, A Checklist for Evaluating Large-Scale Assessment Programs by Shepard (1977) was used. (See Appendix A.) Specific criteria from the checklist were used to evaluate the needs assessment model. In areas where the model did not withstand scrutiny, changes in the model were recommended. The specific areas and their adaptations are detailed in Chapter V.
Information from a survey of the group doing the needs assessment is presented. The criteria for the survey questions are provided by Shepard's (1977) checklist. The survey results can be useful for the educator who wants to learn from an actual field test before conducting a needs assessment in reading.

Although the construction of a needs assessment model is an important feature of this paper, the field testing of this model is the most significant contribution. Field testing provides the educator with data on how the model works in operation. Through the results of conducting a field test, the educator can judge the success of the model.

This model was implemented during a 6-week interval in the spring of 1977. The field testing was conducted in a public school district in southwestern Michigan. The district employs 180 teachers in grades kindergarten through Grade 12 and is heterogeneous in cultural and racial makeup. Nineteen people were selected to be members of the task force which conducted the needs assessment. A complete description of the field test will be offered in Chapter IV of this paper.

Evaluation Instrument for Model

As earlier stated, to provide a conceptual system for gathering information about the model, Shepard's (1977) Checklist of Evaluating Large-Scale Assessment Programs was used. Three checklists seemed most applicable to the work to be conducted. Before the Shepard document was selected for use in this project, Stufflebeam's (1974) Meta-Evaluation Criteria and Scriven's (1974) Checklist for the Evaluation...
of Products, Procedures, and Proposals were considered. The Shepard checklist was selected because it provides the most useful information for the field testing of the needs assessment model proposed in this study. The other two assessment techniques are useful for only product assessment. Therefore Shepard's checklist seems to be best suited to this proposed model which is a process. Shepard has divided the checklist into five categories:

**Goals and Purposes**

The goals and purposes served by conducting a needs assessment should be considered first. It should be noted that the subject here is not reading program goals, but rather, establishment of the goals and purposes for conducting a needs assessment. Examples of these goals or purposes might be the evaluation of programs or the appropriation of resources. Shepard suggests that goals be judged for importance, uniqueness, feasibility, and scope. Therefore, data were gathered in this study to establish whether goals and purposes for conducting the needs assessment were met. Both a questionnaire and in-depth interviews were used with task force members to determine whether goals and purposes are stated clearly.

**Technical Aspects**

The second category of technical aspects includes gathering data, sampling, administering of tests, and reporting test results. A further feature of the technical component of the checklist is that of differentiated reporting. That is, once the results of the assessment
have been analyzed, placed in priority, and stated as objectives, they should be presented to individuals and groups who can act on these findings. Therefore, by surveying task force participants this model was judged on whether the presentation of the results and conclusions fit the information needs and decision-making powers of the groups addressed.

Management

Management of the assessment is the third area of Shepard's checklist. Addressed in the management category are topics relating to equal opportunity, manageability of the model, usefulness in program planning, and redress of grievances. This category, as well as the others in Shepard's checklist, was considered through a survey questionnaire and interviews with task force members conducted following the needs assessment.

Intended and Unintended Effects

Opinions were gathered from the task force about both the intended and unintended effects of the needs assessment procedure. For example, an unintended effect of conducting mastery testing of students is the threat that teachers may feel when examining their own students' test results. An intended effect is a positive effect which comes as a direct result of conducting the needs assessment, such as improved programming.
Costs

The final category of the Shepard checklist is the cost of conducting the needs assessment. Expenditures, in both dollars and time, are considered. A question on the survey was directed to whether the results were worth the costs in the opinions of the task force members.

Summary

To conclude, most educational leaders recognize that continuous functional assessment is an essential ingredient for a total reading program. This field-tested needs assessment model can be used by reading curriculum planners in providing an improved reading program for school children in kindergarten through Grade 12. Although there are needs assessment models available which have been field tested, no reading needs assessment models have been field tested. In addition, many published needs assessment models are limiting because they demand of the user a specific commercial test or published remedial technique. While some models are criticized for being too global, many are nearly useless because they are too narrow. A description of some of the needs assessment models will be included in the next chapter.
CHAPTER II

DESCRIPTION OF SELECTED NEEDS ASSESSMENT LITERATURE

This chapter will describe selected needs assessment models. Common elements of the needs assessment models will be presented. Each of the models will be compared with each other model using the criteria in the Shepard checklist. Each of the eight models which are included here was chosen because it offers specific guidelines and published materials for the practitioner. Most of them have been used widely. For the reader's convenience, a figure is available at the end of this chapter which includes a summary of the models and their common elements. Appendix B lists publishers and prices of materials.

Alameda County Needs Assessment Model

The Alameda County Needs Assessment Model (ACNAM) was developed for elementary schools in California to assess needs as the basis for application to the state educational agency for consolidated funding. The instruments, particularly the teacher and pupil survey forms, are applicable elsewhere. Although ACNAM pinpoints discrepancies between plan and program, it does not rank goals for importance because the state funding agency has already set general curricular priorities.

The model consists of six surveys, two packages of statistical summary and data forms, and a user's manual. The surveys are designed for teachers, parents, elementary school pupils, administrators,
and support staff. Responses are coded on optical scanning sheets; data processing services are available. The parent survey is published in English and Spanish, and the pupil survey comes in a readers and nonreaders (picture) version.

The surveys are designed to gather specific factual information on pupils' knowledge, skills, and attitudes in reading, language development, mathematics, and multicultural education. Questions for parents and school staff relate to input and process variables supporting the instructional areas, as well as needs for bilingual education program, health and counseling services, and staff and parental in-service programs.

Survey questions are based on three intended goals for each instructional and support area. Goals and questions may be modified locally. The survey data are synthesized with standardized test scores and statistical and demographic data to arrive at (a) program goals, (b) discrepancy statements, (c) analysis of causes of discrepancies, (d) objectives, (e) activities, and (f) time lines for instructional and support components.

The Alameda County Needs Assessment Model does not include any directions to the participants about the goals and purposes for conducting the needs assessment activity. The ACNAM also does not provide specific management techniques for conducting a needs assessment. Further, the ACNAM does not consider the effects (whether intended or unintended) of conducting a needs assessment.
Battelle Center for Improved Education Model

Battelle's Center for Improved Education has developed a set of needs assessment surveys for local school districts suitable for the secondary level.

Four questionnaires, designed specifically for parents, for students, for staff, and for the community at large, contain statements of conditions about schools drawn from a master list of 174 items. The items, including both student and institutional variables, are based on 16 functional areas of a model school system.

Participants in the assessment are to be chosen on a stratified random sample basis. Respondents rate each statement of conditions on two five-point scales—one for their perception of the extent to which the condition actually exists, or the "actual state" (A); and one for their perception of the extent to which the condition should exist, the "desired state" (D). A need index for each goal's statement is the numerical difference between the two scale values, A and D. The need indices are then arranged in order of magnitude to show the rankings of the goals.

The Battelle Center will furnish computer printouts which display distribution of scores and a need index for each goal by groups, the percentage of responses for each goal by groups, and the percentage of responses for each point on the scale for A and D values, as well as mean responses.

The Battelle Center for Improved Education Model does not include the beginning step of directing the needs assessment.
participants regarding the goals and procedures for conducting the needs assessment activity. The Battelle Center does not consider either the intended nor the unintended effects of conducting the needs assessment. In addition to not including the goals and purposes and intended/unintended effects of conducting a needs assessment, it is not clear whether Battelle Center has established a procedural step for fixing the costs of the recommended changes resulting from the needs assessment activity.

Bucks County (PA) Public Schools Model

Bucks County Public Schools have produced instruments for the statewide Quality Educational Program Study of Pennsylvania that can be used in any elementary school.

The model consists of a set of booklets: a general needs assessment instrument, based upon the 10 goals for quality education in Pennsylvania, and 10 specific instruments, one for each of the goals. The goals, which have been widely adopted or adapted for use outside of Pennsylvania, are self-understanding, understanding of others, basic skills, interest in school and learning, good citizenship, good health habits, creativity, vocational development, understanding human accomplishments, and preparation for the world of change.

The general instruments can be used by parents, students, teachers, or administrators. The instrument contains the 10 goals and several sub-goals or indicators for each, all of which are rated on a five-point scale of importance. Ratings can be done on a paper-and-pencil scale, or by a card sort. The total points of all ratings are...
used to determine priority areas.

The individual instruments, one for each goal area, are self-assessments to be done by pupils who rate themselves on a number of specific behavioral items using a five-point scale of frequency (how often the pupil performs the action or exhibits the trait).

The management structure for implementing this model can be determined by the local school district. It is not clear how the ratings from the general instrument are to be related at all. Other weak points of the Buck County Public Schools Model are that the goals and purposes for conducting the needs assessment are not mentioned nor are the intended and unintended effects of conducting the needs assessment considered.

Center for the Study of Evaluation/Elementary School Evaluation Kit

Kit: Needs Assessment

The CSE/Elementary School Evaluation Kit is a commercially prepared kit designed to be used by the principal of an elementary school with parents and teachers. The kit consists of a guidebook and a box of materials containing principal's goal rating forms, 10 decks of 106 goal cards, 10 sets of rating mats, 50 rating forms, and 49 parents' goal rating questionnaires.

The school principal directs the process, which consists of four steps:

1. Gathers information on goals the school should be meeting.
2. Selects tests to measure student performance on highly rated goals.

3. Interprets the school's test scores in relation to those of other schools with similar characteristics.

4. Uses a decision model to transform the information already gathered into a set of critical need areas for the school.

When reviewing the Center for the Study of Evaluation/Elementary School Evaluation: Needs Assessment Kit, three descriptors from the Shepard checklist were noted to be weak. First, the goals and purposes for conducting the needs assessment have not been considered. Second, no management strategies for conducting the needs assessment have been provided. Finally, the third descriptor, the intended and unintended effects of conducting the needs assessment, has not been included.

Dallas Model

The Dallas (Texas) model is used as part of the annual budgeting process. The first step is not the ranking of goals, but the determination of high priority need areas. Within the budget cycle, evaluation and needs assessment precede goal determination. A survey instrument listing areas of instruction, classroom operation and management, services for students, school management, and developmental services is used to obtain individual judgments of present and desired conditions. The survey is used with a 15-point rating scale. The survey results show the rankings or priorities desired by principals, teachers, parents, and students; the areas of greatest difference
between perceived present and desired conditions; and composite rank-
ings of priorities and greatest difference areas.

The Dallas model involves the board of education, program man-
gagers appointed for each of the district's seven long-range priority
goals, and a 600-member committee which includes teachers, students,
parents, other citizens, principals, central staff office members,
and representatives of all district employee groups.

Program managers evaluate the accomplishments of ongoing programs
in the light of the previous year's goals or of long-range goals, and
report to all individuals involved. Smaller 24-member committees
meet monthly to focus on various areas of the school program. Inform-
ation from the needs assessment survey is used together with all
other data in arriving at priorities for planning.

Representatives of all the small groups meet with the board at
its first weekend retreat concerning the budget to respond to the re-
vised compiled needs. The program managers select goals from the
needs and discrepancies identified, to be addressed during the school
year.

The Dallas model does not include two descriptors as outlined by
Shepard's checklist. These descriptors, as is the case with all
eight needs assessment models, are summarized in Figure 1. The two
descriptors not mentioned in the Dallas model are establishing the
goals and purposes for conducting a needs assessment activity and the
intended and unintended effects of conducting a needs assessment.
Pupil-Perceived Needs Assessment (PPNA) Model

Research for Better School, Inc., a regional educational laboratory in Philadelphia, has issued a kit which gives educators explicit instructions on developing needs indicators and conducting an assessment of needs as perceived by pupils. The methodology is suitable for use at any grade level.

The kit consists of a box containing a tape cassette and six booklets—planning a PPNA project, developing a PPNA indicator, administering the indicator, processing the indicator data, analyzing and reporting results, and a supplement on sampling. The booklets are well organized, easy to read, and explicit.

The PPNA is unique among needs assessment kits in that it gives step-by-step instructions for local educators to develop their own indicators of pupil needs. Simple checklists and a list of criteria help the administrator or teacher decide on needs.

This model, relying mainly on the community conference and follow-up meetings by parent-teacher-student committees, provides no predetermined set of goals or packaged instruments. It does not consider the intended and unintended effects of conducting a needs assessment. It does not analyze discrepancies in a statistical sense, nor validate community perceptions through "hard data." In practice, however, steering committees tend to refer informally to standardized test information already available to confirm or dispute statements made at the community conference. Thus, the heart of this model seems to be the standardized test.

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Phi Delta Kappa Model

This model program for community and professional involvement, developed at the Northern California Program Development Center at Chico, is distributed nationally through 23 training and dissemination centers of the Phi Delta Kappa organization.

The Phi Delta Kappa (PDK) model has three phases: (a) rating goals on importance and degree of attainment, (b) setting objectives based on the high priority rankings, and (c) developing performance objectives and plans for implementation. Manuals and goal-sorting materials are contained in workshop packets for the first phase.

The goal rating process uses a type of card sort, with active involvement of educators and citizens individually and in small groups. Eighteen goal statements with descriptions are provided on individual cards and rating sheets. Colored discs and a game board are used with the cards in a semi-forced choice procedure, which results in group ratings. Each goal is assigned ratings of importance on a five-point scale, and the data are displayed to show the judgment of different client groups. Instructions are given for assigning ratings.

Goals are also ranked independently by a representative community committee using the card-sort process. Consensus rankings are arrived at in small group sessions. Committee members then use a 15-point scale to rate how well the current school programs are meeting each goal. Average (mean) scores for each goal are derived, and criteria are furnished for interpreting the data.
In this model the emphasis is on assigning priorities to goals, and on involving the professional and public community. The "needs" are the high priority goals. There is no provision for integrating test or other objective data with those goals to arrive at a discrepancy between the actual situation and the proposed situation. There is no provision for validating the perceptions of the raters as to the effectiveness of programs in meeting established goals. The discrepancy data are based solely on the judgment of those involved in the assessment. No attention is given to establishing the goals or purposes for conducting the needs assessment. No attention is given to the intended and unintended effects for conducting a needs assessment.

Right to Read Needs Assessment Package

The national Right to Read program has developed a Right to Read Needs Assessment Package to evaluate program, personnel, and pupil achievement in its school-based centers. The Needs Assessment Package (NAP) provides guidelines for an investigation suitable for any grade level or content area. Right to Read offices in state educational agencies generally have this material and supplementary manuals available and may furnish copies on request. No information on field testing of this material is available. The NAP is the only needs assessment package designed primarily for reading. Most information in the NAP is gained through the use of checklists. The information necessary is available in school records or can be obtained through brief personal interviews. Data are recorded on forms provided.
and suggestions for evaluation are made when deemed appropriate by the director of reading. In the NAP no mention is made of the technical aspects of conducting a needs assessment, nor that of managing a step-by-step assessment procedure. Neither the goals nor the intended and unintended effects of conducting a needs assessment are mentioned.

Summary of Models

Figure 1 displays the common elements of eight needs assessment models using the descriptors as designated by Shepard. The symbols, +, -, and ? provide descriptor information for each model. The + symbol means that the needs assessment system meets the specified criteria. The - symbol means that the needs assessment system does not meet the criteria and the ? means that there is not enough information to make a determination about the criterion level as judged by the checklist.

A summary of Figure 1 indicates that none of the models refers to establishing goals and purposes for conducting a needs assessment at all. Six of the eight models treat the technical aspect of selecting tests, administering tests, and reporting techniques in a most explicit fashion. The Pupil-Perceived Needs Assessment Model and the Right to Read Needs Assessment Package, however, skirt the issue of administering tests.

A step-by-step procedure for managing the needs assessment model appears in half of the selected group. The Battelle Center, Dallas, PPNA, and PDK provide clear, detailed instruction for a step-by-step
<table>
<thead>
<tr>
<th></th>
<th>Goals &amp; purposes</th>
<th>Technical aspects</th>
<th>Management</th>
<th>Intended &amp; unintended effects</th>
<th>Costs</th>
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<tr>
<td>ACNAM</td>
<td>-</td>
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<td>Battelle</td>
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<td>Bucks County</td>
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<td>CSE Kit</td>
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<td>NAP</td>
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<td>+</td>
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</tbody>
</table>

Figure 1

Common Elements of Eight Needs Assessment Models Using Shepard Descriptors

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procedure. None of the eight selected needs assessment models addressed or included intended and unintended effects of conducting an assessment. No mention was made of precautions which should be taken to prevent teachers who believe an assessment program is unfair from becoming test wary. Other unintended effects include the subtle results of conducting a needs assessment prior to a vote on a school bond issue. Although the cost of each needs assessment model, except the Dallas model, is available, none of the selected models elaborated upon the hidden financial and educational costs of student and teacher time.

In summary, eight selected needs assessment models were described. In addition, the five descriptors of the Shepard Checklist for Evaluating Large-Scale Assessment Programs were matched with features of each of the eight models. It should be noted that none of the eight models met criteria for all of the descriptors which are important for a complete needs assessment model. Further, little information is available on the field testing of these models. Chapter III of this paper will detail a needs assessment model which will include each descriptor on the Shepard checklist.
CHAPTER III

THE MODEL: STEPS IN A NEEDS ASSESSMENT IN READING

Before conducting a needs assessment in reading, a model first had to be designed. As was indicated in Chapter II, several different types of general instruments, techniques, and procedures were available. Some had been published as complete kits; others were survey or rating instruments to assess general or specific needs. There were some general models which give guidelines for conducting an individual assessment, but do not include instruments. Consulting firms offer data processing services to accompany some of the models, for example, Battelle Center, which offers such services on a fixed-fee basis. Specific models for reading programs were scarce. The purpose of this chapter is to provide a model and implementation strategies for conducting a needs assessment in reading.

For this paper, a model is considered to be a comprehensive plan which states goals, purposes, and tentative procedures for conducting a needs assessment. This model being proposed included a series of steps for proceeding through the assessment in systematic order. It specified actions to be undertaken within an adaptable and adjustable format. Furthermore, by suggesting activities to be done, this model encouraged those performing the tasks to think through the logic and the interdependence of the steps. By following each step of the organized model, which has a sequence, the people involved will more likely stay on task. Their actions will be organized and directed
because of the sequence of steps in the model.

The model (Table 1) for conducting a needs assessment in reading is discussed on the following pages. This model is designed to provide guidelines for completing a needs assessment in reading. Although situations will vary, the model is planned to extend over 12 or 15 weekly meetings, or approximately 6 months time. The model begins with structuring and planning tasks, and concludes with a report to the public. Before the needs assessment procedure is launched, each of the steps must be reviewed carefully by appropriate administrators of a school district.

It should be noted that although the 13 steps (1.0 through 13.0) of the model are listed in sequential order, it is possible that two steps may need to be considered concurrently. It will also aid understanding of the model to recognize that there are substeps for some of the 13 major steps of the model. A substep is a smaller section of progress in the procedure for conducting a needs assessment. Each substep aids in the procedure step under which it is listed.

1.0 Structure Needs Assessment

In general, this section establishes the setting for conducting a needs assessment. The reason for conducting a needs assessment may result from an assignment by the superintendent, triggered by public complaints, or a request made by staff members. Whatever the impetus, the first step is the initiation of the needs assessment. This structuring will include establishing a purpose for conducting a needs assessment, gaining approval from the superintendent, and requesting
Table 1

Procedures for Needs Assessment in Reading

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<table>
<thead>
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<tbody>
<tr>
<td>1.0</td>
<td>Structure Needs Assessment</td>
</tr>
<tr>
<td>1.1</td>
<td>Set general objectives of needs assessment</td>
</tr>
<tr>
<td>1.2</td>
<td>Set boundaries of needs assessment</td>
</tr>
<tr>
<td>2.0</td>
<td>Establish Task Force</td>
</tr>
<tr>
<td>2.1</td>
<td>Appoint responsible person in charge</td>
</tr>
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<td>2.2</td>
<td>Collect community input</td>
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<td>2.3</td>
<td>Collect school board input</td>
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<td>2.4</td>
<td>Collect education staff input</td>
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<td>2.5</td>
<td>Collect student input</td>
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<td>2.6</td>
<td>Collect other input</td>
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<tr>
<td>3.0</td>
<td>Establish Time-Task Framework</td>
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<tr>
<td>3.1</td>
<td>Develop short-range timetable</td>
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<tr>
<td>3.2</td>
<td>Develop medium-range timetable</td>
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<tr>
<td>3.3</td>
<td>Develop long-range timetable</td>
</tr>
<tr>
<td>4.0</td>
<td>Identify Desired and Present School Reading Conditions</td>
</tr>
<tr>
<td>4.1</td>
<td>Identify cell of concern</td>
</tr>
<tr>
<td>4.2</td>
<td>Identify who is to be surveyed</td>
</tr>
<tr>
<td>4.3</td>
<td>Identify instrumentation and procedure</td>
</tr>
<tr>
<td>5.0</td>
<td>Conduct Survey</td>
</tr>
<tr>
<td>6.0</td>
<td>Select Goals and Objectives</td>
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<tr>
<td>7.0</td>
<td>Place Goals and Objectives in Priority</td>
</tr>
<tr>
<td>8.0</td>
<td>State Information about Variables Which Impact the Goals</td>
</tr>
<tr>
<td>9.0</td>
<td>Set Priorities Among Needs</td>
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<tr>
<td>10.0</td>
<td>Formalize Needs Statements</td>
</tr>
<tr>
<td>11.0</td>
<td>Interpret Needs Priority List</td>
</tr>
<tr>
<td>12.0</td>
<td>Report to the Public</td>
</tr>
<tr>
<td>13.0</td>
<td>Reconsider Long-Range Time-Task Framework</td>
</tr>
</tbody>
</table>
funding from the school board for conducting the needs assessment. Then the needs assessment procedure can be structured which includes setting the general objectives and boundaries. It is likely that these first two substeps could occur simultaneously. The general objectives may be set (1.1) while at the same time boundaries are set (1.2) by the person appointed to conduct the needs assessment.

1.1 Set General Objectives of Needs Assessment

There are three major aspects of this model which are specifically aimed at determining educational needs. These may be considered as general objectives of a needs assessment. Although there may be other more obscure or less justifiable reasons for conducting a needs assessment (noting trends or garnering millage support, for example), these are the major objectives of a needs assessment. The first objective is ascertaining needs of highest priorities. Since this information helps focus the program planner's attention on salient problems, it can facilitate decisions for developing and modifying educational programs. Needs assessment data is thus useful for more efficient allocation of personnel, time, and resources. The second objective is justifying the focus of attention on some needs while ignoring others. Such justification is often necessary in proposals and reports to school boards and parents. And the third objective is providing baseline data for subsequent assessment of student performance.
1.2 Set Boundaries of a Needs Assessment

The boundaries of a needs assessment should be established by the director of reading. It is the responsibility of the director of reading to instruct the group on their responsibilities as part of the needs assessment. To assist the director of reading in guiding the group to pinpointing specific concerns, a matrix is introduced which interweaves three important concerns when conducting a needs assessment. Pinpointing these specific concerns will help set the boundaries of a needs assessment.

This proposed needs assessment model in reading includes three areas of concern: institutional concerns, human concerns, and process concerns. These areas of concern were selected by the author because they represent the main issues of program planning (Sweigert, 1971).

Institutional concerns are associated with the entire school district, at a particular grade level, or at a building level. In conducting a needs assessment, the director of reading would isolate a specific area of institutional concern if that were the focus of the assessment. Valuable time and energy might be unnecessarily expended if the director of reading does not accurately pinpoint building level concerns. The systematic steps of the model can focus attention and efforts on the appropriate area of concern.

Specifying personnel or human concerns clarifies which groups of people are the focus of the needs assessment. It may be unnecessary for an entire school district to be part of the needs assessment.
procedure. A principal, for example, might want to consider only staff concerns at one building.

Process concerns include such topics as classroom climate, student achievement, staff communication, instructional methods, and curriculum content and planning. Isolating a single process for examination can provide useful information for systematic curriculum improvement.

Figure 2 presents a cube to help the reader visualize the interweaving of the main issues in program planning (institutional, human, and process concerns). The intersection of any three of these dimensions represents a cell. This system will also help set boundaries of a needs assessment. Examples of how the organizer can be utilized may be: Concerns are focused by parents about the reading curriculum through the district. Parents (the human dimension of the cube) are concerned about curriculum (the process dimension of the cube) at the district level (the institution dimension of the cube). A second example may be of a building principal wanting some more information about the climate in the classrooms in his building. A building principal (the institution dimension of the cube) needing information from teachers and students (the human dimension of the cube) about classroom climate (the process dimension of the cube).

The director of reading should publicize general objectives and boundaries of the needs assessment. Informing people about procedures, objectives, and use of the results will maximize their cooperation. If there is no feeling of participation from the teachers, parents, or students regarding the needs assessment, then the results from the
Figure 2

Identifying Areas of Concern
needs assessment may be viewed with indifference or hostility. To avoid this dilemma, the director of reading, together with the board and administration, should take great care to plan and commit themselves to meaningful and substantive involvement. The director of reading, in reviewing the general objectives of the needs assessment, can help the board and administration understand that this process is more than just looking at test scores. It is a comprehensive program planning activity which will interweave three major issues.

2.0 Establish Task Force

The task force group should be large enough to include support from various interest areas, but small enough so that it does not become unwieldy—20 people is recommended. Support from interest groups—such as teachers, citizens, and students—can be enhanced by increasing their involvement in several steps of the needs assessment. This support can be rewarded by including in the needs assessment an evaluation of human concerns and by insuring understanding of the results. Rogers (1969) points out that innovation of new programs is more acceptable to the people involved if they participate in the program's inception.

Because education is the appropriate concern of many groups within the community, assessment of educational needs involves each group in some way. Community members, supervisors, teachers, non-certified school personnel, and students should all be involved in the process of conducting a needs assessment. This means input from all groups must be considered in establishing the criteria and goals
of the educational system. Similarly, the perceptions and observations of educators are vital sources of data on conditions within a school district. Input from each group can be garnered by having a cross-section of people on the task force.

To select a task force, the director of reading may announce at a school board meeting that a needs assessment is to begin. Steps 1.1 and 1.2, setting objectives and boundaries of the needs assessment, should be explained to the school board members. Then, persons interested in participating in the needs assessment should be invited to volunteer. To provide input from diverse groups within the community, a director of reading may need to solicit personally additional support. Teachers from a cross-section of grades K-12 and from various school buildings should be carefully selected by the director of reading. Likewise it is recommended that a balance of elementary and secondary school principals be recruited. Each substep below (2.1, 2.2, 2.3, 2.4, 2.5, 2.6) indicates where input on the task force is desirable. Input or information is garnered by having a representative on the task force. Information from each section of the community will be gathered informally through that representative on the task force.

2.1 Appoint Responsible Person in Charge

Typically, the person in charge of a needs assessment in reading should be the director of reading services for the school district. If there is no director of reading services in the district, a building principal or curriculum director could direct the needs assessment.
The person in charge of the needs assessment has specific responsibilities. One task is identification of people to carry out each portion of the needs assessment. Another task is to ensure the preparation and dissemination of the reports on results of the needs assessment. The person in charge must also provide moral support and material resources to the task force. Finally, the person directing the needs assessment must facilitate the collection and dispersal of information to the community on progress toward identified goals.

2.2 Collect Community Input

Ample opportunity should be provided for any member of the community who wants to be part of the task force. The purpose of the task force can be publicized in community and school newspapers and announced at school board meetings. Leaders from various cultural, service, and social agencies can also be contacted to find task force members. For the purposes of this model, it is suggested that approximately one-third of the task force be members of the community, who are not employees of the school system.

2.3 Collect School Board Input

A member of the board of education should be appointed or allowed an opportunity to volunteer to be on the task force. The board is ultimately responsible for setting direction within the school district, so the needs assessment process can be enhanced by the board member's insight and input.
2.4 Collect Education Staff Input

One of the most positive contributions of a needs assessment might be establishing an appreciation for the accountability process among educators. Those educators affected by accountability need an appreciation of the values of the process. Appointment of a cross-section of the teaching staff, including representatives of the teacher's association is vital to ensure staff commitment in reaching goals. A balance of elementary and secondary school principals must also be appointed. For the purposes of this model, it is suggested that approximately one-third of the task force be educators.

2.5 Collect Student Input

Students should be active participants in the task force. Since this position requires a great deal of responsibility, it is suggested that older high school students be selected. Student members can provide unique perceptions of general feelings among other students. Students can aid in defining educational goals.

2.6 Collect Other Input

Some school systems may elect to include an external consultant to conduct surveys, audits, or to otherwise give professional advice in conducting a needs assessment.
3.0 Establish Time-Task Framework

After the objectives and boundaries of a needs assessment have been established by the director of reading and given to the task force, an estimate of the time required to accomplish the tasks should be made. The time estimate provides a time-task framework. Although the process of conducting a needs assessment may be completed in 6 weeks, implementing program changes will necessarily take longer than 6 weeks. Evaluating progress toward goals will require the longest time. All time frames should be established and considered by the task force to provide both educators and non-educators alike with a view of the sequence and dimension of tasks they can expect to encounter.

3.1 Develop Short-Range Timetable

A short-range timetable (1 year or less) for starting the needs assessment, reporting the findings, and revising existing programs should be developed. The director of reading should clarify the expected time commitment of the task force members. At this early stage of the needs assessment process only a process timetable can be established, since needs have not been identified to provide a needs timetable.

3.2 Develop Medium-Range Timetable

A medium-range timetable (2-4 years) for establishing programs, utilizing resources, evaluating progress, reporting, and revising
programs should be developed. Some school districts, for example, may retain a subcommittee from the original task force to continuously review textbook needs in reading. Reviewing textbooks is the type of task which would require a medium-range timetable. Other medium-range tasks might be developing an in-service component for teachers, write locally developed materials, or conduct a nationwide search for filling a key school district position.

3.3 Develop Long-Range Timetable

A long-range timetable (5 years) for operating programs, utilizing resources, evaluating progress, and reporting and revising programs should be developed. Experimental reading programs, for example, may require longitudinal review based on a long-range timetable. Other long-range projects may be redeveloping local goals and objectives or writing a secondary level language arts course of study.

4.0 Identify Desired and Present School Reading Conditions

This needs assessment model uses three areas of concern when considering the desired and present reading conditions in a school system. As was introduced in the first step in this model (1.2 Set Boundaries of a Needs Assessment), the three areas of concern are: institutional concerns, human concerns, and process concerns. Selecting the appropriate cell of concern can be aided by using the cube. Locating the proper concern, selecting which population should be questioned, and preparing an instrument to find information about the
concern is the next step in the model.

4.1 Identify Cell of Concern

The reading areas of most concern are identified by task force members through a communication process called brainstorming. Brainstorming is a technique of attacking specific problems in small discussion groups which aim to collect ideas by withholding criticism or judgment on ideas as they are initially produced. The question, to be posed during the brainstorming session, is: "What are the needs which must be considered in planning a quality reading program in this district for all students in future years?" Often a survey instrument is used to develop a list of concerns. One fault of this technique is that in assembling the survey, its author can too easily impose personal values and judgments. By brainstorming, the entire task force has a role in eliciting concerns.

4.2 Identify Population to Be Questioned

After a cell of concern has been identified, the task force should select the appropriate population to be questioned. If, for instance, the cell dealing with student achievement is of highest concern to the group, then it will be the students who will be questioned by measuring their achievement.

4.3 Identify Instrumentation and Procedure

By selecting a specific instrument for gathering information about a cell of concern, an approach for conducting a needs assessment
is pinpointed. Selecting a standardized instrument which may not be applicable in certain situations can be avoided if a broad range of concerns are the starting point. Highly specific evaluation instruments must be selected or developed by the task force as prescribed by identification of the cell of concern. During the selection of instrumentation it is to be kept in mind that the desired conditions will be established by stating the goals and objectives of the cell of concern.

5.0 Conduct Needs Assessment Activity

After a cell of concern has been established, the appropriate population has been identified and the instrumentation has been selected, then the actual needs assessment activity takes place. As stated earlier, some steps of the needs assessment model may occur simultaneously. It is possible for example that conducting the needs assessment activity and selecting goals and objectives may be conducted at the same time.

A need is a gap or discrepancy between existing conditions and desired future conditions. The existing reading conditions within the school system are established by conducting the needs assessment activity. To state the desired conditions to be met in the future, goals and objectives for the specific cell are now selected.

6.0 Select Goals and Objectives

Each cell of concern must have clearly stated educational goals and objectives. The choice of goals indicates the kind of information
needed about that area. If determination of whether or not the goals have been met is desired, additional specificity of goals is required. This is accomplished by constructing more precise statements of expectations in the format of objectives. These statements should be expressed in behavioral terms when appropriate. Behavioral objectives are essential to the development of a reading program, because they establish a basis for measuring program effectiveness and for guiding any program change. These objectives should delineate data which is indicative of success and should delineate acceptable levels of success (criteria) for reading programs.

It is not always necessary for the task force to generate their own wording of the reading objectives. There are many sources of prepared objectives in reading. The Instructional Objective Exchange (IOX) collects, prepares, and distributes objectives for use in various subject areas. Related especially to concerns in reading are "Objectives in the Decoding Skills of Reading," and "Reading Comprehension," and "Structural Analysis."

7.0 Place Goals and Objectives in Priority

Instruction for placing goals in priority should be given to the individuals on the task force. After each individual has placed the goals and objectives in priority, then the goals and objectives should be placed in priority by small groups. This insures that individual opinion will be tempered by group judgment. The director of reading should select four small groups of five people each. Care should be taken that these groups consist of task force people from a mixed
background of educational experience. Each group will select a leader and attempt to reach consensus for each objective. The objective which is given top priority is given a number "1." As the groups reassemble, into the full task force, the consensus scores should be averaged and recorded. The objective which has the smallest score will be considered to have top priority with the task force. Finally, the ranks of the goals and objectives should be announced to the task force by the director of reading.

8.0 Describe Variables Affecting Goals

As mentioned previously, a broad educational goal is useful for giving general direction to the school district. A more specific statement is necessary for determining whether educational goals have been met. This is done by having the task force construct a more precise statement of conditions. These more precise statements of conditions are sometimes called indicators. People use indicators to assist in making decisions relative to purchasing a home (prime interest rate for mortgage money), buying stocks (Dow-Jones averages), or judging the purchasing power of take-home pay (Consumer Price Index). Likewise, some states (notably New York, Pennsylvania, and Oregon) collect information which provides indicators that their school programs are meeting expectations. An indicator might require finding out how many students are still in college 1 year after high school graduation. The local school district would develop a study aimed at gathering the needed information.
Below is a sample of a behavioral objective, together with the proposed accomplishment of goal and the performance indicator. It is noted that the source for finding the performance indicator is from the statewide assessment test.

<table>
<thead>
<tr>
<th>OBJECTIVE</th>
<th>PROPOSED ACCOMPLISHMENT</th>
<th>PERFORMANCE INDICATOR*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase development of reading skills.</td>
<td>Develop and implement by July 1, 1977, a city-wide plan to insure local schools organize reading programs so all students have an opportunity for instruction necessary to cope with their environment.</td>
<td>Percentage of students demonstrating specific &quot;survival level&quot; reading skills at the fourth grade level.</td>
</tr>
</tbody>
</table>

*Source: Test item on Statewide Assessment of Student Performance, State Department of Education.

9.0 Set Priorities Among Needs

After the goals and objectives have been selected and placed in priority and the needs assessment survey instrument is completed by the target sample, then the needs statements can be listed. The target sample was established when the cell of concern was determined. In this needs assessment, any group can be considered to be an appropriate sample, not only students. A need is a gap or discrepancy between an objective which is given high priority by the task force, and for which the current conditions are less than desired. Need priorities can be established in various ways. If the task force agrees, those needs which reflect the greatest discrepancy may be given first priority. Or priorities might be established on the basis of expense or time. The task force may want to place least
expensive items in first priority or may favor items easiest to complete. Criteria for setting priorities should be established by the task force and kept explicit throughout the needs assessment to guide the task force.

10.0 Formalize Needs Statements

This is the most critical stage in the needs assessment as it requires the task force to place the goals in priority order and to consider the variables which affect the achievement of these goals. A list of priority gaps or discrepancies constitutes a needs assessment. It is important that needs statements be listed without reference to cause. They should be statements of fact, showing the difference between the sample's estimate of current and desired conditions. These are three examples of needs statements:

1. Fifteen percent of the senior class could not read an editorial from the New York Times with at least 80% comprehension as measured by a criterion referenced instrument prepared by the teacher and approved by the department chairman.

2. Two percent of the first graders at Wilwood School could not represent their trip to the zoo with art, writing, or drama, as determined by teacher records.

3. Twenty-two percent of the teachers of the St. Lawrence Public Schools have not had a course in teaching reading in the last 15 years, as measured by a teacher questionnaire.

11.0 Interpretation of Need Priority List

Developing instruments and compiling data are important steps in a needs assessment. Any positive or negative impact of the process
comes after the results of the needs assessment have been made available. It is essential to describe the results of the assessment or survey before any interpretation occurs. Data interpretation is the responsibility of the task force, and more specifically, of the director of reading. It is important that some degree of consensus be reached in the interpretation. The interpretation of the need priority list involves explaining to the school board how a need was derived. Task force agreement on the interpretation allows the school board to set priorities for action.

After the school board has heard the report from the director of reading and the other task force members, then it is left to the school board to act on the results. The results of the needs assessment dictate what strategy the school board should take. Action cannot be expected to alleviate all needs simultaneously.

12.0 Report to the Public

Reports generated by the needs assessment must be written in appropriate forms for different target audiences. A technical report replete with statistical comparisons can be developed for educational researchers and key educational administrators. A "plain English" version of the report should be developed for parents, students, and the public so laymen can understand and react to the findings.

13.0 Reconsider Long-Range Time-Task Framework

The completion of the needs assessment represents the beginning of a meaningful continuous process with provisions for review included.
Only through the review process can assessment of needs, continued modification of programs, and further evaluation of the school program continue to improve and provide meaningful educational experiences to students.

Summary

This chapter has outlined 13 steps for conducting a needs assessment for the reading program. The model provides a sequential system for the director of reading to use in program planning. This model considers needs from a three-dimensional perspective: human concerns, institutional concerns, and process concerns.

Now that the needs assessment in the reading program has been designed, it is ready to be field tested. A field test should provide evidence of the model's utility. Only through actual implementation of the procedures in the needs assessment model, can the model be adequately tested.
CHAPTER IV

IMPLEMENTATION OF THE NEEDS ASSESSMENT

The needs assessment was begun at the direction of the superintendent of schools in a school district in southwest Michigan. In 1976, the school district had 3,100 students in grades kindergarten through Grade 12. There were six elementary schools, one junior high school, and one senior high school, with an instructional staff of 180 members. The population of the school district was 20,000 people. Several industries, three of which had their corporate headquarters in or near town, provided an upwardly mobile population. Parents generally had high expectations for their children.

1.0 Structure Needs Assessment

In the field test, the superintendent asked the chairperson and the administrative representative of the Communication Skills Curriculum Committee to meet with him to discuss a procedure for program planning. The Communication Skills Curriculum Committee was one of 11 different curriculum committees in the school system. Each committee was designed to deal with a different curricular area, such as math, social studies, fine arts, vocational arts, and science.

During the meeting with the chairperson and the administrator, the superintendent reviewed his estimate of the worth of a needs assessment to explore program planning changes in the area of communication skills. He spoke of concerns with poor test results at the
junior and senior high school in the areas of reading, writing, and grammar. Both parents and teachers had called his office questioning quality of the textbooks, training of the teachers, availability of materials, methods of reading and writing instruction, and a host of other related items. But the superintendent wasn't sure that conducting a district-wide needs assessment was the appropriate way to go. The chairperson and the administrator tried to talk the superintendent into considering the needs assessment, mentioning the value of using a task force of parents, students, and teachers. As it would soon be time to finalize the school budget for the 1978-79 school year, the superintendent was anxious to settle monetary considerations necessary to complete the program planning. The superintendent suggested that a quick and almost effortless way of dealing with everyone's concerns would be to have three or four teachers get together to select a new textbook. He agreed, however, that if a needs assessment could begin and end within 6 weeks (because of the need to finalize the budget) he would give approval to proceed. He asked that a final report on the findings of the needs assessment be presented to the board of education at their regularly scheduled meeting on April 3, 1978.

1.1 Set General Objectives of Needs Assessment

The 13 steps of the proposed needs assessment were reviewed with the superintendent. It was agreed that as a procedure, the needs assessment would provide an opportunity for parents and educators alike to discuss concerns about the reading program. It was mentioned
again that the end result of the needs assessment would probably be a recommendation to buy a new textbook. It seemed that for the superintendent the purchase of a new set of books would solve the problem.

1.2 Set Boundaries of a Needs Assessment

The boundaries of the needs assessment were reviewed with the district administrators by the communications skills chairperson. To assist in setting the boundaries, three important concerns in planning the reading program were introduced: institutional concerns, human concerns, and process concerns. The communication skills chairperson used Figure 2 as a device to help the administrators visualize how these three concerns were interwoven and to provide the boundaries of the needs assessment.

It was explained that this needs assessment, in particular, was to take place in order to examine options for program planning for the 1978-79 school year. It was explained that a needs assessment is a formal process for identifying outcome discrepancies between current results and desired results, placing those discrepancies in priority order, and selecting the discrepancies of highest priority for action.

The superintendent asked that the chairperson announce the needs assessment at the next board of education meeting. The general objectives and boundaries of the needs assessment were described at the board of education meeting just as they were described for the administrators. The board of education voiced a vote of confidence for the project and selected one of its members to be on the needs
assessment task force. The superintendent then asked publicly for any volunteers who were interested in the improvement of the quality of reading services offered in the school district to join the needs assessment task force.

2.0 Establish Task Force

The superintendent asked the chairperson of the Communication Skills Curriculum Committee and the administrative representative to proceed by selecting task force members. It was decided that 20 people would be the appropriate number for the group. Care was taken to choose people who represented as many different roles within the community as possible. For example, one member of the group was selected because she was the head librarian of the city library, and was also the mother of five graduates of the senior high school.

Letters requesting support on the needs assessment task force were sent to the 20 people selected. Three people declined to serve because of time conflicts. In these instances alternates who represented a similar role were asked to participate. A copy of the first letter to the potential task force members is included in Appendix C. It should be noted that all the expected meeting dates were given in the letter, so members of the task force could be expected to be available for each meeting. A follow-up letter is also included in Appendix C. Since no members volunteered in response to the request at the public meeting, all task force members had to be invited.
2.1 Appoint Responsible Person in Charge

The chairperson of the Communication Skills Curriculum Committee was chosen to chair the task force. This position was most like the title of Director of Reading Services. Such an exact title did not exist in the town of the field test. The chairperson of the Communication Skills Curriculum Committee had held that post for 2 years and was familiar with the recently completed set of reading goals and objectives.

2.2 Collect Community Input

Six members from the community were selected to join the needs assessment task force. Member one was a man who had four children in the public schools, held a doctorate in chemistry, and had an administrative position with the largest industrial firm in the community. Member two was a woman who had three children in the schools and recently completed her master's degree in reading instruction—but did not work in the school system. Member three was an accountant who had had three children graduate from the public schools. Member four was a retired school superintendent (from another district) who was still active in the community. Member five was an active community clubwoman who studied school issues seriously and attended all school board meetings. And finally, community member six was a librarian with the public library and the mother of five children, all of whom had graduated from the public schools. Although each of the six representatives from the community had had children in the local schools, each member offered a unique background.
2.3 Collect School Board Input

The school board member invited to join the task force had expressed an interest in the communications skills area. He was a new member of the school board who represented the board and kept them informed, in an informal way, on the progress of the needs assessment.

2.4 Collect Education Staff Input

It was decided that it would be advantageous to the task force for at least one teacher from each building and from all three levels of instruction (elementary, junior high, and senior high) to be included. Three teachers from grades K-6 were selected, each teacher from a different elementary school building. Two junior high school teachers were selected. One of these teachers taught English and the other taught journalism and composition courses. Two senior high school teachers were selected. One taught a foreign language and the second taught English. Each of these education staff representatives collected information from his/her peers in an informal way. Yet, since these staff members are all seasoned, serious teachers, it could be expected that comments and information provided from each of them would be valid and valuable.

2.5 Collect Student Input

A senior high student was asked to be part of the task force. He was active in student affairs and was a leader among his peers. Although he was not asked to formally poll his peers, it was
considered that his input could have been representative of a majority of other students, had they all been polled.

2.6 Collect Other Input

In this needs assessment, no other personnel were used formally. If needed, however, informative comments could have been obtained from other sources, such as businesses or consultants.

3.0 Establish Time-Task Framework

Although the expected time of the needs assessment procedure was outlined in the original letter to the task force, a complete time-line was reviewed with the group at this first meeting (Appendix D). The chairperson explained the general objectives and boundaries of the needs assessment. It was explained that a needs assessment would be defined as a formal process for identifying outcome discrepancies between current results and desired results, placing those discrepancies in priority order, and selecting the discrepancies of highest priority for action. The chairperson introduced the members of the task force to each other and presented them each with a folder of materials including an outline of the 13-step model, a time-line, and a task force member roster.

3.1 Develop Short-Range Timetable

Included in the time-line were the four meetings of the task force and a meeting to report to the board of education and a meeting to report to the public.
3.2 Develop Medium-Range Timetable

Since this field study was approved on the condition it be completed within a 6-week period, a medium range time-line (2-4 years) was not appropriate. Formal review of the needs assessment recommendations should take place within 2-4 years, however.

3.3 Develop Long-Range Timetable

A long-range timetable (5 years) for operating programs, utilizing resources, evaluating progress, and reporting and revising programs was developed by the task force.

4.0 Identify Desired and Present School Reading Conditions

To garner areas of concern, the chairperson used the technique called brainstorming. This procedure was designed to encourage members of the task force to express their perceptions of the communication skills program. Some remarks made during brainstorming had only a marginal relationship ("appropriate use of movies in the classroom," for instance) to the topic of communication skills. Even marginal comments were accepted to keep the lines of communication alive. The task force completed the brainstorming without using the three dimensional cube. The task force had not been introduced to the cube yet.
4.1 Identify Cell of Concern

After everyone had a chance to speak up on areas of immediate concern and each comment had been noted, the chairperson helped organize these thoughts by grouping them into three areas: institutional concerns, human concerns, and process concerns. The scribe recorded all of the concerns which were written on the board. These concerns are included in Appendix E.

The chairperson revealed and described the three-dimensional organizer. Utilizing this organizer, the task force selected the cell which seemed to contain the majority of their concerns. The task force decided that most of their concerns settled in the cell which was the intersection of the teachers (human) implementing curriculum (process) at the district level (institution).

4.2 Identify Population to Be Questioned

After reviewing the comments and selecting the cell of concern, the task force decided the entire teaching staff of kindergarten through grade 12 should be surveyed. Items selected to be used on the instrument came from the brainstorming session and from already adopted district reading goals and objectives.

4.3 Identify Instrumentation and Procedure

The members of the task force who were not educators felt that they would feel better if the educators met during the week to draft a survey that would be worded to represent each of the concerns.
expressed during the initial brainstorming. Items on the survey were arranged to allow teachers to indicate the present situation in each of the areas of concern, as well as the optimum situation in each of the areas of concern. Time was spent discussing the procedure for surveying the entire staff. It was decided that principals would hold individual building meetings, allowing time for each staff member to respond to the instrument. The complete survey can be found in Appendix G. The instrument listed concerns expressed in a manner which would reflect a teacher's point of view. Each of the concerns was evaluated on the importance of the concern and the extent to which the concern was being remedied. Responses were rated on a numerical scale from 1 to 5. One indicated the respondent's least important concern and 5 indicated the most important concern. There was also a number (6) to mark for a concern which was not applicable. When all instruments had been collected and the number of responses tallied, the concerns were ranked from highest total or the areas of greatest need, to lowest total or the least important needs.

This style of instrumentation was selected in preference to an interview technique, for example, because of the ease and relative objectivity in locating gaps or needs in the reading program.

5.0 Conduct Needs Assessment Activity

Each educator on the task force was assigned a school building in which to conduct the needs assessment activity. The task force member brought the instruments in for the staff meeting and was available to answer any questions. At the completion of the meeting, the
instruments were collected and brought back to the chairperson. There were several questions at each school about the reasons for conducting the needs assessment. Although no one refused to fill in the instrument, there was some hesitancy about the value of such an effort. The most often asked questions were, "What are you doing with the results?" and "How soon will we see them?"

6.0 Select Goals and Objectives

In this particular situation, goals and objectives had been established by the Communications Skills Curriculum Committee before the needs assessment procedure had started. The goals had been developed, at the direction of the superintendent and board of education in 1975. The committee which selected these goals included teachers from each grade level. Selecting and, in some cases, writing goals and objectives took this committee two meetings a month for 2 years.

7.0 Place Goals and Objectives in Priority

Again, this step in the model had been completed before the task force had met. Because the Communications Skills Curriculum Committee had so recently placed their goals and objectives in priority, this task force did not need to repeat the procedure. A complete set of goals and objectives was distributed to the task force for review. There were some questions about the order in which certain tasks were taught. For example, one task force member commented on the role of comprehension in the act of reading. The idea that reading
comprehension can and should be taught in a sequence paralleling the child's development was reviewed.

8.0 Describe Variables Affecting Goals

The cell of concern in this field study was how well the communication skills curriculum was being implemented by teachers in the district. Teaching objectives, not student objectives, were being examined. Teaching concerns such as communication between and among teachers, standard forms of teaching grammar, and proper materials were the operational topics in this case. Although it could have been possible, indicators about these topics were not elicited.

9.0 Set Priorities Among Needs

The task force reviewed the completed surveys from the target sample, the teachers. Each item was rated by the teachers, on a scale from 1 to 5, as to its importance and as to its attainment in the existing program. The higher the number marked on the scale the greater the importance or attainment of the item. The responses for each of the two parts of each item were tallied. This resulted in a total rating for the importance of each item and for the extent to which the particular item was present in the existing program. For each item the total responses were tallied on each of the two aspects of the item. The numerical difference between the importance of the item and the extent to which it was being attained became an indication of a discrepancy. The discrepancy figures indicated the difference between the items of most importance and the extent to which
they were being attained. Using these numbers to indicate discrepancy, the items were placed in order of priority. This finally resulted in a list of discrepancies or needs from most important in priority to least important.

10.0 Formalize Needs Statements

To prepare a report for the board of education, a list of needs statements was established. It can be observed that for the purpose of this needs assessment, the goals were not placed in priority according to degree of discrepancy. In this case the goals were arranged in a time priority. In order to provide information useful for preparing the 1978-79 school year budget, it was decided to arrange each need statement in one of three categories: goals which could be implemented immediately, goals which could be implemented before September 1978, and goals which could be implemented during the 1978-79 school year. A copy of the needs statements is included in Appendix G.

11.0 Interpretation of Need Priority List

On April 3, 1978, the completed needs assessment procedure was reported to the board of education. In addition to listing the needs statements, a Step-by-Step Implementation Plan was recommended to the board by the task force. Attached to each copy of the plan was the projected cost of the recommendation. This chart of the step-by-step implementation and costs suggestions is in Appendix H.
The chairperson delivered the report orally to the board. The members of the task force were present with the chairperson to answer any questions. When the chairperson of the task force had completed the report, board members asked questions about the needs assessment. Examples of the questions they asked were: "Would you repeat how many staff members were part of this needs assessment activity?" or "Could you explain again how you derived your needs statements?" After there were no more questions, the board voted to accept the report and to direct the superintendent to proceed with the recommended implementation plan. Implementation, however, would be subject to the availability of money in the budget.

12.0 Report to the Public

At the close of the board of education meeting a newspaper reporter from the local newspaper questioned the chairperson and the members of the task force. A complete review of the results of the needs assessment was written by a reporter and printed in the newspaper the next day.

13.0 Reconsider Long-Range Time-Task Framework

The task force agreed prior to the board meeting that if nothing was done with the recommendations within 1 month, the task force would ask the board about its lack of action. A portion of the original task force was scheduled to meet twice annually to examine the recommendations. When new information about program planning was necessary, the needs assessment activity could begin again.
CHAPTER V
THE FIELD TEST AND IMPLICATIONS

The purpose of this chapter is to show how a field-tested needs assessment model can be evaluated. In order to evaluate the model, care was taken to select an appropriate evaluation device. This chapter will describe the selected evaluation checklist, tell how it was operationalized, report the utilization of the results, and suggest ways the model could be changed.

The topic of developing a needs assessment model in reading and conducting a field study of that needs assessment model was selected because there are few models available for use by a director of reading. Information about a field-tested needs assessment model in reading is limited. It is important to have a proved needs assessment model available for several reasons. Such a model can be indispensable for program planning, evaluation, accountability, and funding justification. In his recent book, The Educational Imagination, Eisner (1979) cites six social forces influencing the curriculum. Some of these forces (declining enrollment and educational consumerism, for instance) represent more recent concerns which influence education. Whether the more traditional influences on curriculum planning are considered, or some of the more recent concerns, there are numerous uses for a reliable model for conducting a needs assessment.

This 13 step model was conducted using a task force comprised of members of the educational and lay community. Care was taken to enlist
input from various interest groups when developing the membership of the task force. Rather than beginning with a preconceived list of goals, the task force generated concerns about the school reading program. It was from this list of concerns that a specific area is addressed. To aid in focusing on a specific area, a three dimensional cube was introduced. The three dimensions, human, process, and institutional, provided the boundaries for conducting the needs assessment. The cell in which three of these dimensions intersect constituted the cell which was examined for the needs assessment.

An instrument was developed which included concerns from the task force on one scale (present conditions) and reading goals on another scale (desired conditions). The difference between what is desired and what constitutes a present condition is defined as a gap or need. A list of these needs in the order of their priority constitutes a needs assessment.

Procedures

After the needs assessment was conducted, data collected, and information reported to the board of education and to the public, a questionnaire was given to the task force members who conducted the needs assessment. The purpose of the questionnaire was to provide information which might be useful in establishing the worth of the needs assessment model. Although other instruments were considered for evaluating the model, Shepard's (1977) Checklist for Evaluating Large-Scale Assessment Programs was selected. The Shepard checklist helped in establishing whether the needs assessment model used in this
field study could be judged worthwhile. If valid, the model could be used by other districts seeking information about their reading programs. In addition to using a questionnaire, two members of the task force were randomly selected to be interviewed. The interviews were conducted by the chairperson of the task force for the purpose of eliciting individual responses on the effectiveness of the needs assessment process.

To provide a meaningful outline for a questionnaire, categories from the Shepard checklist (see Appendix A) were used in designing the questionnaire. Thirteen questions were developed around the five Shepard categories and the questionnaire was given to the task force.

The survey questioned two main areas of the needs assessment process. One set of questions concerned the functioning of the task force focusing on such aspects as planning, understanding of purpose, and opportunity of each member to contribute. The rest of the questions concerned the results of the needs assessment. These questions focused on the collection of data and interpretation of that data to allocate resources, and the report to the board. Task force members were also asked to indicate any negative effects of the needs assessment or whether they would again participate in a needs assessment.

The response mode for each question was yes or no. Space for comments was provided after each question. Two questions, not directly implied by the Shepard checklist, were asked: "Would you be willing to be interviewed about this needs assessment activity?" and "Given the opportunity, would you serve on such a committee again?"

To elicit idiosyncratic comments from the task force two questions
were asked at the end of the questionnaire: "What was the most beneficial thing to come from this needs assessment?" and "What was the least beneficial thing to come from this needs assessment?"

Results

Each person on the task force was mailed a copy of the questionnaire (Appendix I) with a stamped, self-addressed envelope. All 19 members of the task force returned their completed questionnaires. After the completed questionnaires were tabulated, the results were reviewed by the chairperson of the task force. A tabular result of the questionnaire is available in Table 2.

Questionnaire

Table 2 can be synthesized by using the major categories of Shepard's checklist as organizers. Based on the question involving the goals and purposes for conducting the needs assessment, 63% of the participants felt that the purpose for the needs assessment was clear at all times.

Responses to questions about the technical aspects indicate that 16% of the task force were not sure about the report to the school board. The management of the needs assessment activity earned the highest marks. All but 5% of the task force felt that the sessions were handled in a well organized manner. Twenty percent of the task force were either negative or unsure about proper allocation of resources. In the category intended and unintended effects, 89% of the people indicated they felt the needs assessment was timely.
<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>%</th>
<th>No</th>
<th>%</th>
<th>Not sure</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Were the results of the needs assessment what you expected?</td>
<td>16</td>
<td>84</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>2. Was it clear to you at all times what the purpose of the needs assessment was?</td>
<td>12</td>
<td>63</td>
<td>5</td>
<td>26</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>3. Did the survey conducted among the (school name) faculty serve in gathering data?</td>
<td>17</td>
<td>89</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>4. Did you feel that the report to the board of education was adequate?</td>
<td>15</td>
<td>79</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>5. Were the results of the survey appropriately interpreted?</td>
<td>14</td>
<td>73</td>
<td>3</td>
<td>15</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>6. Did you feel that the six sessions were adequately planned?</td>
<td>18</td>
<td>94</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>7. Was there equal opportunity for all members of the task force to contribute?</td>
<td>18</td>
<td>94</td>
<td>1</td>
<td>5</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8. Was the needs assessment timely?</td>
<td>17</td>
<td>89</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>9. Was the overall outcome what you expected?</td>
<td>15</td>
<td>79</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>21</td>
</tr>
<tr>
<td>10. Were the resources recommended fairly allocated?</td>
<td>15</td>
<td>79</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>11. Given the opportunity, would you serve on such a committee again?</td>
<td>19</td>
<td>100</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>12. Were there any negative effects to the needs assessment?</td>
<td>9</td>
<td>47</td>
<td>5</td>
<td>26</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>13. Would you be willing to be interviewed about this needs assessment activity?</td>
<td>18</td>
<td>94</td>
<td>1</td>
<td>5</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

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Eighty-four percent of the task force members thought the results of the needs assessment were what they had expected.

In response to the final questions about the detrimental aspects of the needs assessment, there were comments about individuals being omitted, about lack of understanding between secondary and elementary teachers, and about ineffectual impact of the needs assessment on program changes.

Interview

Two interviews were conducted with randomly selected task force members by the chairperson of the task force. Selected for these interviews were one community member from the task force and one English teacher. To elicit responses from these two people, the interviewer orally posed each of the questions from the printed questionnaire. Before each question the interviewer said: "Tell me more about this question . . ."

The community member reported that since the process of participating in a needs assessment was new, and therefore foreign to her, there were really no expected results. Additionally, the purpose of the needs assessment was not clear at the beginning. She was disappointed that her comments were not reflected in the survey which was administered only to teachers. It should be reiterated here that teachers were the target population of the survey. This was established by the task force. The target population of the survey was indicated by using the cube to determine the cell of concern.
The second interview was conducted with a teacher who was a member of the task force. The only information gathered about the effectiveness of conducting this needs assessment was in reference to the quality of the survey itself. This interviewee had doubts about the wording of the survey questions. She felt that her peers had trouble understanding how the poorly phrased questions would serve any purpose in changing program planning. Thus she felt the answer to question 3 "Did the survey conducted among the (school name) faculty serve in gathering data?" had to be no. Likewise, she did not feel that the results could be appropriately interpreted since they were based on unclear questions.

The questionnaire and interview results both proved to be effective means of evaluating the needs assessment process. Using the Shepard checklist as a basis for establishing the questions provided a useful framework for evaluation. The Checklist for Evaluating Large-Scale Assessment Programs can prove an effective tool for evaluating and improving needs assessment models. The checklist was useful because it provided a vehicle for providing an improved needs assessment model.

Summary

The Shepard checklist was used to help in improving the needs assessment model. The members of the task force were asked to complete a questionnaire regarding their perceptions of the needs assessment activity. Questions were developed using the criteria from the Shepard checklist. Thirteen questions made up the questionnaire.

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The evaluation revealed that of all the questions, the task force found the area which needed to be reviewed was that of knowing the goals and purposes for conducting the needs assessment. Of the 19 people on the task force, 12 people (63%) felt that "the reasons for conducting the needs assessment was clear at all times." Five people (26%) did not feel that the reasons for conducting the needs assessment were clear at all times. Two people (10%) of the task force were not sure whether the reasons for conducting the needs assessment were clear at all times.

Another weakness of the model concerns the interpretation of the results. Of the 19 people on the task force, five people questioned the results of the needs assessment and their appropriate interpretation.

Improvement of the Model

Based on evaluation of the model using the Shepard checklist, the two areas which did not withstand scrutiny were goals and purposes of conducting the needs assessment and intended and unintended effects of the needs assessment not unlike other models. To reflect these noted deficiencies, the model could be altered. Two additional steps could be added to strengthen the model. The first improvement could be made at the beginning of the model changing the first step to:

1.0 Establish Purpose for Conducting Needs Assessment. The purpose for conducting the needs assessment could be established by the superintendent at a board of education meeting and restated in meetings held within the schools (staff meetings). Therefore, the
second step would be the step which originally was number one: 2.0 Structure Needs Assessment.

A second improvement which could be made based on the Shepard checklist involves the interpretation of the results. Although the task force was given an opportunity to interpret the results of the needs assessment activity, more opportunity should be allowed for nonmembers to make suggestions. Hearings could be held on the results of the needs priority list (10.0) before the need priority list is interpreted (11.0). The task force should attend the hearings to gain new understanding of how other people feel about the needs assessment results. This hearing could be advertised publicly to provide ample opportunity for many people to attend. If this step is added, a sub-step under 11.0 Formalize Needs Statements could read: Conduct public hearing regarding needs statements.

Improving the needs assessment model, then, involves adding two additional steps. One additional step is added at the beginning of the process (1.0 Establish Purpose for Conducting Needs Assessment). The other additional step is added toward the end of the process (11.1 Conduct community hearings on need statements). With the added improvements to the needs assessment model after using the Shepard checklist, the 14 step model would read as shown in Table 3.
Table 3
Revised Procedures for Needs Assessment in Reading

1.0 Establish Purpose for Conducting Needs Assessment

2.0 Structure Needs Assessment
   2.1 Set general objectives of needs assessment
   2.2 Set boundaries of needs assessment

3.0 Establish Task Force
   3.1 Appoint responsible person in charge
   3.2 Collect community input
   3.3 Collect school board input
   3.4 Collect education staff input
   3.5 Collect student input
   3.6 Collect other input

4.0 Establish Time-Task Framework
   4.1 Develop short-range timetable
   4.2 Develop medium-range timetable
   4.3 Develop long-range timetable

5.0 Identify Desired and Present School Reading Conditions
   5.1 Identify cell of concern
   5.2 Identify who is to be surveyed
   5.3 Identify instrumentation and procedure

6.0 Conduct Survey

7.0 Select Goals and Objectives

8.0 Place Goals and Objectives in Priority

9.0 State Information About Variables Which Impact the Goals

10.0 Set Priorities Among Needs

11.0 Formalize Needs Statements
   11.1 Conduct community hearings on need statements

12.0 Interpret Needs Priority List

13.0 Report to the Public

14.0 Reconsider Long-Range Time-Task Framework
Implications for Practice

A needs assessment could appropriately be used from preschool through adult education. It can be done at one school, or on one level at a time, or throughout the whole system. A needs assessment can give a great deal of useful information. This paper has alluded to several reasons why conducting a reading needs assessment would be invaluable to a school system. Here, in summary, are reasons why replicating this needs assessment might be valuable:

1. The director of reading will have information in a three dimensional context: human concerns, process concerns, and institutional concerns.

2. The director of reading will discover where the areas of strength and weakness are, thus laying the basis for more rational curricular planning.

3. Needs assessment can give direction for placing priorities in allocating scarce resources.

4. When done successively over 2 or 3 years, the assessment can show trends related to increasing, declining, or changing pupil populations.

5. Should reading achievement test scores in a district decline, a good needs assessment will help find the causes of the difficulties and set priorities for corrective action. The assessment will either uncover new information, or document and validate policies and programs already in action.

6. Conducting a needs assessment is valuable for completing the information requested when applying for federal and state grants.
7. When the community is involved in the process, more acceptance for the resulting plans and policies can be expected than if educators alone assess the needs and make the decisions. When dissident as well as supportive groups are given a voice, and their participation is invited in a constructive fashion, there is a better chance of reaching consensus on the areas of greatest need.

A needs assessment is never completed. It must be a continuing affair, and changing needs are to be expected. A need is not a solution. Preconceived solutions must be left out of statements of discrepancies, or they bias the outcome and restrict the use of innovative or creative ways to solve a problem.
APPENDICES
Appendix A

A Checklist for Evaluating Assessment
A Checklist for Evaluating Assessment

1. Goals and purposes

Kinds of goals: 
- Pupil diagnosis
- Pupil certification
- Program evaluation
  - Program improvement
  - Program selection
- Resource allocation
- Accountability
- Research

Criteria for judging goals:
- Importance
- Uniqueness
- Feasibility
- Scope

2. Technical aspects

Tests:
- Criterion-referenced vs. norm-referenced
- Content validity
- Cultural bias
- Empirical validity
- Reliability
- Sampling
- Administration of tests
- Reporting
- Data analysis
- Different reports for different audiences
- Interpretations

3. Management

Planning
- Documentation of process
- Formative evaluation
- Personnel
- Support services
- Subcontractors
- Effective decision-making procedures
- Equal opportunity
- Redress of grievances
- Timelines
4. Intended and unintended effects

People and groups who may be effected:

- Students
- Teachers
- Parents
- Principals
- District superintendents
- District curriculum specialists
- Regional personnel
- State curriculum experts
- State legislators
- State governors
- Taxpayers
- Employers
- Special interest groups
- Researchers

Kinds of effects:

- Outcome and process effects
- Immediate and long-term effects
- Opinions
- Decisions
- Laws
- Resource allocation
- Effects of assessment technology

5. Costs

- Dollars
- Time
- Negative effects
Appendix B

Publishers and Prices of Materials
Publishers and Prices of Materials

ALAMEDA COUNTY NEEDS ASSESSMENT MODEL (ACNAM)

Publisher: Office of the Alameda County Superintendent of Schools
685 A Street
Hayward, California 94541

Cost:* $5.00 for complete sample kit

Contact Person: Dr. Belle Ruth Witkin, Coordinator, Research & Evaluation

BATTELLE'S SURVEYS

Publisher: Battelle's Center for Improved Education
505 King Avenue
Columbus, Ohio 43201

Cost: Fixed price basis to the district or college

Contact Person: David L. Hamilton, Program Director, Management Systems

BUCKS COUNTY QUALITY PROGRAM EDUCATION STUDY

Publisher: Office of the Bucks County Superintendent of Schools
Intermediate Unit #22
Division of Curriculum and Instruction Services
Ansley Building - Old Easton Road, R.D. #4
Doylestown, Pennsylvania 13901

Cost:* $10.00 for one set

Contact Person: Dr. Raymond Bernabei

CSE ELEMENTARY SCHOOL EVALUATION KIT: NEEDS ASSESSMENT

Publisher: Allyn and Bacon, Inc., Longwood Division
470 Atlantic Avenue
Boston, Massachusetts 02210

Cost:* $147.50

Authors: Ralph Hoepfner, Paul A. Bradley, Stephen R. Klein, Marvin C. Alkin

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DALLAS MODEL

Publisher: Dallas Independent School District
3700 Ross Avenue
Dallas, Texas  75204

Cost: Unavailable

Contact Person: Dr. Larry Ascough, Assistant Superintendent

PUPIL-PERCEIVED NEEDS ASSESSMENT PACKAGE

Publisher: Research for Better Schools, Inc.
1700 Market Street
Philadelphia, Pennsylvania 19103

Cost:* $25.00

Contact Person: Dr. Susan L. DeLorme, Senior Author

PHI DELTA KAPPA MODEL

Developer: Northern California Program Development Center
California State University
Chico, California  95926

Distributor: Phi Delta Kappa, Inc.
Commission of Educational Planning
P.O. Box 789
Bloomington, Indiana  47401

Cost:* Program for 60 persons - $70.00

NEEDS ASSESSMENT PACKAGE FOR RIGHT TO READ SCHOOL-BASED CENTERS

Publisher: Right to Read Program
U.S. Office of Education

Cost: Available upon request

*Cost as of 1/1/78.
Dear ___________________________:

The Superintendent of Schools, with the School Board's approval, has requested that the Communication Skills Curriculum Committee conduct a Needs Assessment. This Needs Assessment process is for the purpose of making curriculum plans for the 1978-79 school year.

You have been selected to serve your community and schools on this Needs Assessment Task Force. We will meet on six consecutive Thursday evenings at 7:00 pm beginning with Thursday, March 2. The final session will be our report to the Board of Education.

Our secretary, Mrs. Miller, will call you before Friday to get your commitment on this important matter. She will in turn send you the agenda for our first meeting.

Sincerely yours,
Dear __________________________:

We appreciate your response to our request and are looking forward to seeing you at our first meeting to be held on ______________ at __________ p.m. in the Board Room at Jefferson School.

The agenda for the first meeting will include:

1) Welcome, information and directions for the evening.
2) Brainstorming - a chance to "Speak Out."
3) Prioritize - identifying our concerns.

If you have any questions regarding the procedures for the meeting, please call me.

Thank you for your cooperation and assistance in this most valuable activity.

Sincerely,
Appendix D

Communication Skills Needs Assessment
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<td>I. C-A Committee &amp; Bd.</td>
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<td>developed priority of goals for Dist. Schools</td>
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<td>III. Developed 1st draft of objectives</td>
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<td>IV. Revised objectives and added resources</td>
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<td>VII. Sub-Committee of educators prepare NA instrument</td>
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<td>XI. Implement</td>
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<td>XII. Recycle to Item V</td>
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Appendix E

Concerns Recorded During Needs Assessment Brainstorming
Concerns Recorded During Needs Assessment Brainstorming

Process/Product

In-service for teachers.

Diversified—college and non-college—to be adequately prepared.

Communications within system between staffs and administration and board.

College-bound more help—more emphasis on better reading.

Are teachers giving priority to communication skills?

Are students being taught study skills?

Help students to learn to enjoy reading all life.

Speak and write legibly, logically, and to prepare a report for employer.

Less varieties of English subjects and more basics

Are audiovisuals used as a crutch.

Daily significant experience in reading, writing, speaking, listening each day.

Third column in Reading Curriculum Book have a techniques column—suggested ways of achieving goals.

Book (Communication Skills) must be used.

Leadership enforcement—consistency of expectation on all parts of leadership.

Encourage parental cooperation with staff to implement language teaching.

Utilization of materials in the system—learn to use them—share.

Exploration of new ways to utilize materials.

Priorities—is elementary band more important?
Process/Product—continued

Listening skills to be taught.
Students are willing to go back to basic classes in drill.
Could have used more condensation in writing.

Personnel

Curriculum Coordinator
--department heads
--grade level chairpersons

Certification of English teachers in Jr. and Sr. High Schools
(major in English).

All teachers need to be trained to recognize remedial student.

Have teachers been retrained recently in all communication
skills?

Counselors helpful in choosing correct courses.

Are teachers knowledgeable concerning courses?

Time.

Materials

The sources needed in elementary language books--coordinate with
grammar K-12.

Diagnostic testing--K-12 standardized.

Individual needs of students--remedial in elementary.

Are there materials for all students--interesting? each level?
Appendix F

Needs Assessment Survey
**NEEDS ASSESSMENT SURVEY**

Circle the number which best describes your feelings about the importance and the attainment of each goal.

<table>
<thead>
<tr>
<th>How important is it?</th>
<th>To what extent is the goal being attained?</th>
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<tbody>
<tr>
<td>1 2 3 4 5 6</td>
<td>1 2 3 4</td>
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<tr>
<td>1 2 3 4 5 6</td>
<td>1 2 3 4</td>
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<td>1 2 3 4 5 6</td>
<td>1 2 3 4</td>
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<tr>
<td>1 2 3 4 5 6</td>
<td>1 2 3 4</td>
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</tbody>
</table>

1. My students have adequate Thesaurus materials.
2. My students have adequate dictionary materials.
3. a) My students have adequate materials for studying Communication Skills (Elem.).
   b) My students have adequate materials for studying Communication Skills (Jr. High).
My students have adequate materials for studying Communication Skills (Sr. High).

My students have interesting reading materials available regardless of their reading level.

a) I have annual diagnostic testing (i.e., Stanford Diagnostic) results on the Communication Skills of my students
b) I have annual achievement testing (i.e., Iowa Test of Basic Skills) results on the Communication Skills of my students.
c) I have annual objective reference testing (i.e., Michigan Education Assessment) results on the Communication Skills of my students.

When available, audio visuals are being used constructively.

I am using the Communication Skills Curriculum Guide as a guideline for instruction.
### Materials

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<th>1</th>
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<tr>
<td>8. I am kept aware of the availability of materials within the (school name) Public Schools.</td>
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### Process/Product

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<tr>
<td>9. A coordinated standardized system of teaching grammar K-12 is currently in effect.</td>
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<td>10. Teachers are given adequate opportunity for in-service training in the teaching of Communication Skills.</td>
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<td>11. College bound students are being adequately prepared to read, write, listen, and speak.</td>
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<td>12. Non-college students are being adequately prepared to read, write, listen, and speak.</td>
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<td>13. My students are being taught study skills.</td>
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<td>14. I am preparing my students to read for lifelong enjoyment.</td>
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</table>
15. The priority in Communication Skills classes is on the proficiency of basic skills, rather than analysis.

16. My students are offered significant experiences in reading, writing, speaking, and listening daily.

17. Communication is successful between and among school board members, (school name) Schools Staff members, and the community.

18. I am aware of what is expected of me by the Superintendent and my Principal.

19. Communication Skills can effectively be taught under the present pupil/teacher ratio.

20. I have sufficient time to adequately teach the Communication Skills.

21. Parents are aware of their role in the teaching of Communication Skills.

<table>
<thead>
<tr>
<th>1=least important</th>
<th>2=of marginal importance</th>
<th>3=average importance</th>
<th>4=most important</th>
<th>5=does not apply</th>
<th>1=less than adequate</th>
<th>2=adequate</th>
<th>3=more than adequate</th>
<th>4=does not apply</th>
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</table>
22. The (school name) system-wide philosophy gives priority to the teaching of Communication Skills.

Personnel

23. A Curriculum Coordinator is available to insure vertical and horizontal articulation.

24. Department heads and grade level chairmen are used to aide in vertical and horizontal articulation.

25. English teachers at Jr. and Sr. High are English majors or semester hour equivalents.

26. I am trained to recognize and help a remedial student.

27. Adequate special services are available to help remedial students.
28. I know and use the latest methods for teaching Communication Skills.

29. Students are adequately counseled.

30. I am informed of student courses in the (school name) Schools.
Appendix G

Communication Skills—Need Statements
Communication Skills--Need Statements

Goals we can implement NOW:

1. Parents are aware of their role in the teaching of Communication Skills.

2. Communication is successful between school board members, (school name) staff members, and the community.

3. A coordinated standardized system of teaching grammar K-12 is currently in effect.

4. When available, audio visuals are being used constructively.

5. Students are adequately counseled.

6. I am informed of student courses in the (school name) Schools.

Goals we can implement BEFORE SEPTEMBER 1978:

7. A Curriculum Coordinator is available to insure vertical and horizontal articulation.

8. Department heads and grade level chairmen are used to aide in vertical and horizontal articulation.

9. Communication skills can effectively be taught under the present pupil/teacher ratio.

10. Adequate special services are available to help remedial students.

Goals we can implement DURING 1978-79 SCHOOL YEAR:

11. My students have adequate materials for studying Communication Skills (Elem.).

12. I am trained to recognize and help a remedial student.

13. Teachers are given adequate opportunity for in-service training in the teaching of Communication Skills.

14. Non-college students are being adequately prepared to read, write, listen, and speak.
Appendix H

Step-by-Step Implementation of Need Statements
### Step-by-Step Implementation of Need Statements

<table>
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<tr>
<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
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</table>
| 1. Parents are aware of their role in the teaching of Communication Skills. | 1) A Board mandate through the Management Council that each building principal be responsible for supplying a way to inform parents of their roles in the teaching of Communication Skills.  
Example: Group conferences in the fall in which parents are informed of particular strategies they may use in improving their children's Communication Skills.  
Example: School notes or newsletters sent home on the subject of Communication Skills. In schools that already have a newsletter, this information could be added to the existing medium. | |
| | 2) A series of articles detailing exactly what parents could do to help their children improve their Communication Skills. These articles should be written by the Communication Skills group and submitted to the news media for publication. | |
| | 3) Principal responsible to inform parents of Communication Skills:  
a) Elementary — conferences;  
notes from grade schools  
b) Jr. High — newsletter;  
group conferences (Back-to-School Night) | |
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<tr>
<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
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</table>
| 2. Communication is successful between school board members, (school name) Staff members, and the Community. | 1) Give to parents a single sheet which specifically lists suggestions for helping children at home in Communication Skills.  
2) Submit to the News Palladium the Board agenda each month. Encourage News Palladium cooperation. Perhaps Board President can contact newspaper.  
3) School Notes resumed.  
4) Back-to-School Night at each instructional level.  
5) Community Attitude Survey—as was done approximately 10 years ago. | Release two 1/2 days for 5—$150  
$160                                                                 |
| 3. A coordinated standardized system of teaching grammar K-12 is currently in effect. | 1) Ask Board for priority commitment to Communication Skills for next year (to be started this spring).  
2) Articulate the philosophy of the committee and standardize the terms used. Standardize the language in the curriculum guide.  
3) Consult other authorities (schools; National Council; perhaps North Central or other evaluating organizations).  
4) Coordinate—use members of Communication Skills Committee—provide leadership and materials. | 10 $160                                                                 |
Step-by-Step Implementation of Need Statements—Continued

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<th>Goal</th>
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<th>Cost</th>
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<tr>
<td>5) Hold in-services (before end of school day (2:00-5:00 p.m.) to describe these new additions to the Communication Skills Curriculum Guide.</td>
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<td>a) First for persons teaching Communications Skills.</td>
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<td>b) Then for all faculty.</td>
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<td>4. When available, audio visuals are being used constructively.</td>
<td>1) Rejoin REMC.</td>
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<td>2) Frequency check by principals.</td>
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<tr>
<td>3) How used check by principals.</td>
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<td>5. Students are adequately counseled.</td>
<td>1) Since counselor-student ratio is 375/1, small group counseling situations are recommended:</td>
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<td>a) Counselors will be in each English class to explain elective program.</td>
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<td>b) Counselors introduce themselves in fall to small groups and explain their duties.</td>
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<td>2) Individual conferences with students and parents of 8th and 10th graders with the counselors for scheduling and interpretation of student's ability (test scores).</td>
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Step-by-Step Implementation of Need Statements—Continued

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<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
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</table>
| 6. I am informed of student courses in the (school name) Schools in the Communication Skills. | 1) (School name) 7th grade parents to be given a list of courses taught at (school name). All faculty members K-12 to be given this list also.  
  2) Couple (school name) list with high school Course Description Catalog. Inform all teachers of this 7-12 Course of Study (with a visit to each elementary building).  
  3) Send home via school newsletters the fact that this Course Description Catalog is available. |       |
| 7. A Curriculum Coordinator is available to insure vertical and horizontal articulation. and | 1) Recommend that a full-time Curriculum Director be hired.  
  a) Interviews be handled by a panel of educators, board members, administrators.  
  b) Testing services and in-service training be part of the job description for this position. | $25,000 |
| 8. Department heads and grade level chairmen are used to aid in vertical and horizontal articulation. | 2) 13 department heads; 7 grade level chairmen; and 3 administrators to form Curriculum Council.  
  3) Secretary for Curriculum Director.  
  4) Meet regularly as called by Curriculum Director. | $43,500 |
Step-by-Step Implementation of Need Statements—Continued

<table>
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<tr>
<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
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<tr>
<td>9. Communication Skills can effectively be taught under the present pupil/teacher ratio.</td>
<td>1) Recommend that Board policy wording be changed to: &quot;Every effort shall be made to keep classes at 25 or less.&quot;&lt;br&gt;2) Instructional aides be hired in each building to be used upon request for instructional assistance under the supervision of the classroom teacher. Aides could be trained by the remedial reading teacher.&lt;br&gt;3) Continue exploring volunteer program.</td>
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<tr>
<td>10. Adequate special services are available to help remedial students.</td>
<td>1) One Remedial Reading Teacher for elementary schools with idea of hiring more later. $15,000&lt;br&gt;2) Teach elementary AVT and Fernali to all classroom teachers.&lt;br&gt;3) Letters to go home to parents on how to encourage reading at home.&lt;br&gt;4) Request state universities to require reading courses of all graduating teachers.</td>
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<tr>
<td>11. My students have adequate materials for studying Communication Skills (El.).</td>
<td>1) A subcommittee of the Communication Skills Committee to begin a materials search. Note attached review of current Language Arts materials available.</td>
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</table>
### Step-by-Step Implementation of Need Statements—Continued

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<tr>
<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
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</table>
| 12. I am trained to recognize and help a remedial student.           | 1) LD disability teachers can work with only a small segment of our student population.  
                                                                 | 2) Workshop—all teachers need to recognize symptoms of problem.  
                                                                 | 3) Reinstate gym teacher in Kindergarten Early I.D. Program  
                                                                 | 4) Reach nursery schools with prevention program.  
                                                                 | 5) Review professional services now available.                                                                                                                                                                                   | $200  |
| 13. Teachers are given adequate opportunity for in-service training in the teaching of Communication Skills. | 1) The Board should instruct the Management Council to use contracted in-service days for the purpose of Communication Skills training.  
                                                                 | 2) The Communication Skills Committee and the Curriculum Coordinator should be charged with the responsibility of planning and implementing in-service training.  
                                                                 | Examples:  
                                                                 | a) Guest speak.  
                                                                 | b) "Every Teacher Is An English Teacher" Workshop. (A workshop conducted and led by English teachers and designed to encourage other teachers (junior and high school) to incorporate the Communication Skills into their courses. | $5,000 |
Step-by-Step Implementation of Need Statements—Continued

<table>
<thead>
<tr>
<th>Goal</th>
<th>A Step-by-Step Implementation</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>c) Teachers teaching teachers (English department in-service designed to allow English teachers a chance to share ideas on a regular basis).</td>
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</tbody>
</table>

3) Other in-service training methods:

a) Workshops and conferences (i.e., NCTE and MRA conventions).

b) Non-credit seminars for the purpose of updating (AVT).

c) Release time for textbook selection.

d) Class visitations.

14. Non-college students are being adequately prepared to read, write, listen, and speak.

1) Through preventative programs and hiring elementary reading teacher, avoid needing special services for non-college bound students.
Appendix I

Task Force Questionnaire
Task Force Questionnaire

RETURN BY FEBRUARY 28, 1979

DIRECTIONS: Circle YES or NO. Please add any additional remarks.

1. Were the results of the Needs Assessment what you expected?  YES  NO
   COMMENTS: ____________________________________

2. Was it clear to you at all times what the purpose of the Needs Assessment was?  YES  NO
   COMMENTS: ____________________________________

3. Did the survey conducted among the (school name) faculty serve in gathering data?  YES  NO
   COMMENTS: ____________________________________

4. Did you feel that the report to the Board of Education was adequate?  YES  NO
   COMMENTS: ____________________________________

5. Were the results of the survey appropriately interpreted?  YES  NO
   COMMENTS: ____________________________________

6. Did you feel that the six sessions were adequately planned?  YES  NO
   COMMENTS: ____________________________________
7. Was there equal opportunity for all members of the Task Force to contribute?  
   YES  NO
   COMMENTS: ____________________________________________

8. Was the Needs Assessment timely?  
   YES  NO
   COMMENTS: ____________________________________________

9. Was the overall outcome what you expected?  
   YES  NO
   COMMENTS: ____________________________________________

10. Were the resources recommended fairly allocated?  
    YES  NO
    COMMENTS: ____________________________________________

11. Given the opportunity, would you serve on such a committee again?  
    YES  NO
    COMMENTS: ____________________________________________

12. Were there any negative effects to the Needs Assessment?  
    YES  NO
    COMMENTS: ____________________________________________

13. Would you be willing to be interviewed about this Needs Assessment activity?  
    YES  NO
    COMMENTS: ____________________________________________

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PLEASE COMMENT:

What was the most beneficial thing to come from this Needs Assessment?

What was the least beneficial thing to come from this Needs Assessment?
BIBLIOGRAPHY


Scriven, M. *The methodology of evaluation*. Lafayette, Indiana: Purdue University, 1970.


Worthen, B. R. A look at the mosaic of educational evaluation and accountability. Northwest Regional Educational Laboratory, August 1974.