Environmental Scan & Needs Assessment

Understanding the landscape of needs and issues in your diverse network and how we are positioned to address them is key to fulfilling our CSUE mission. This can be done through environmental scans. An environmental scan (or environmental assessment) is a thoughtful analysis and evaluation of the strategic environment facing the organization (George Washington University's Strategic Management & Performance Systems Certificate Program, 2019). Environmental scans can focus both externally (who we serve) and internally (how we operate). Environmental scan work may include:

- PESTLE analysis (political, economic, social, technological, legal, environmental)
- Secondary data/literature review
- Strategy canvas
- SWOT (strengths, weaknesses, opportunities, threats) or SOAR (strengths, opportunities, aspirations, results) analysis

Needs assessment can be considered another type of environmental scan. A needs assessment is a process of understanding needs and how to meet them (Donaldson & Franck, 2016). They can take on many forms such as:

- Advisory boards
- Focus groups
- Informal conversations with clientele, stakeholders
- Internal needs assessment (of CSUE professionals)
- Key informant interviews
- Program participant feedback
- Surveys

Each type of **environmental scan** and **needs assessment** has pros and cons as illustrated for select tools in the table below (adapted from Donaldson & Franck (2016)).

Tool	Description	Pros	Cons	When to Use
PESTLE analysis	An analysis of relevant political, economic, social, technological, legal, environmental forces that may impact your strategy	Comprehensive overview of external factors that may affect your work; Can help you identify emerging issues	Does not account for internal (organizational) factors; Typically relies on staff perspectives rather than diverse informants	When a group is in need of a step back to the bigger picture/macro environment to drive and refine programming
Secondary data/ literature review	A review of existing reports, data, and publications to increase your awareness and knowledge of issues	Utilize existing data; Can allow you to plan programs that meet documented needs; Easy access to information for individuals and teams	May require significant time to find the most relevant data	When you can benefit from a deeper understanding of current research or the priorities of other stakeholders
Strategy Canvas	A tool to identify factors that drive success in your field and how you differentiate from competitors	Helps you pursue a strategy based on your unique competencies relative to other organizations	Does not explicitly account for external factors	When you have a good understanding of external factors and need to differentiate your offerings from other orgs
SWOT/SOAR analysis	An analysis of strengths, weaknesses, opportunities, and threats (or strengths, opportunities, aspirations, and results) facing an organization	Takes both external and internal (organizational) factors into account to maximize strategy	Typically relies on staff perspectives rather than diverse informants	When a group needs a single tool to account for key external and internal factors to drive programs
Focus groups	A group interview exercise in which participants share perspectives with one another and a moderator	Provides firsthand knowledge of a situation and insight into potential causes; Can provide some sense of the breadth of an issue compared to interviews; One individual's contributions can spark new ideas and contributions from others	One person can dominate a group; People are not always willing to share sensitive information in a group setting	When rich qualitative data are needed from targeted informants to better understand issues, opportunities, and barriers; Enough participants (5 or more) can be recruited to participate
Key informant interviews	Interviews of stakeholders thought to have critical knowledge and insight on an issue	Provides firsthand knowledge of a situation and insight into potential causes	Knowledge of situation can be limited to their own context; Not reliable sources of information about the actual number or distribution of persons affected by a social problem	When rich qualitative data are needed from targeted informants to better understand issues, opportunities, and barriers
Surveys	Questionnaires delivered to targeted or random populations	Can provide accurate information on the extent and distribution of a social problem; Easy to distribute; Can be affordable and quick	Unless good survey methods are used, the results can be skewed, particularly marginalized groups are underrepresented; Difficult to get complex information; Might not answer questions about sensitive topics	Want to understand the scope/breadth of an issue; Limited time to collect data; Access to a significant number of email/physical addresses

In general, environmental scans provide a broad perspective of organizational opportunities based on existing (secondary) data and staff perceptions. Needs assessments provide detailed information about what existing and potential clients may want out of an organization (primary data). Using multiple tools can provide a more comprehensive and inclusive set of insights. Use of multiple tools also allows for *triangulation* of data between difference sources. For example, conducting key informant interviews in conjunction with surveys can provide both depth and breadth to a formal needs assessment effort. The two needs assessment methods may come to similar conclusions and build confidence in your interpretation. On the other hand, they may reveal seemingly contradictory data that requires deeper analysis. Adding a SWOT (or SOAR) analysis could bring together various external needs with your internal strengths and opportunities. Using a needs assessment to inform a strategy canvas exercise can help you be strategic on how to meet needs while giving you a head start on actual program development.

The tools you choose will depend on whether you are working as an individual or with a team, where you already feel confident in your understanding, and the time and resources you have at your disposal. While more formal tools were highlighted in the table, also keep in mind that less formal ways of understanding your strategic environment and needs (such as having conversations with clientele) can and do provide significant program planning insights. Environmental scans are important because they serve to inform all subsequent parts of the program planning process. The most effective environmental scans combine everyday, casual assessment with periodic, more strategic efforts.