USER NEEDS ASSESSMENT GUIDE FOR STATE LMI OFFICES

Why Conduct a Needs Assessment?

A user needs assessment can help state LMI offices systematically understand how users interact with their data products and where gaps exist. It can take the form of a survey, interviews, focus groups, or a combination of methods.

Key Goals Include:

- Understand current utilization across different user groups
- Identify barriers users face in accessing and using LMI tools
- Surface preferred features and functions
- Pinpoint areas for improvement
- Expand reach across new or underserved audiences
- Establish a feedback loop for ongoing, sustainable product development



How to Conduct a Needs Assessment?

Step 1: Identify Your Target Audience

Before building any survey or planning interviews/focus groups, be clear about who you want to learn from.

- Brainstorm the primary user groups for your data products (e.g., workforce boards, community colleges, job seekers, student, employers).
- Select a priority group (or set of closely related groups) you want to understand better. Avoid trying to address too many user groups at one time as needs and contexts may vary significantly across groups.

Step 2: Stakeholders Assessment

After identifying your target audience group, think about who else needs to be engaged to support the assessment and to what extent. This includes both individuals within the target group (e.g., specific contacts who can help distribute the survey or participate in interviews) and external stakeholders who may influence or be affected by the findings.

- Identify key individuals and organizations within and beyond the primary user group who should be involved as participants, distributors, or decision-makers.
- For each stakeholder, think about how they will be engaged (survey, interview, or focus group)? What will incentivize their participation?
- Conduct a **stakeholder analysis** to assess potential conflicts of interest and understand who has decision-making power over relevant items.
- If you have a communications team, involve them early in the assessment process. They are experts in crafting the right message and can distribute across multiple platforms, including LinkedIn and organizational newsletters, to maximize reach.
- Would move this up under the “Develop engagement strategy” section - better to involve these folks earlier rather than later in the process

Step 3: Develop a Distribution and Engagement Plan

- Identify which individuals and organizations have direct access to your target audience.
- Determine which outreach channels will produce the strongest response (e.g., email lists, partner networks, association newsletters, LinkedIn, etc.)
- Consider which audiences may need to be engaged through methods beyond a survey, such as interviews or focus groups, and plan for those touchpoints.

Step 4: Develop Your Data Collection Instrument

Depending on your goals and audience, you can use surveys, interviews, focus groups, or a combination of methods. Each method requires a slightly different approach to planning and design.

Survey

Length and Format

- Aim for 20 to 25 questions total
- Mix multiple-choice questions (for quantifiable results) with open-ended questions (for depth and unexpected insights)

Tool Options

- **Microsoft Forms**: Free with MS Office Suite enterprise license; results export directly to Excel for easy tabulation and visualization.
- **SurveyMonkey**: Widely used; paid plans required for surveys over 10 questions or more than 25 responses.
- **Qualtrics**: Subscription-based. Widely used in academia.

Additional Resources on Survey Design

- Questionnaire Design Tip Sheet | Harvard University Program on Survey Research
- Creating Effective Surveys

Interviews and Focus Groups

Choose a Structure

- Highly structured: Ask every participant the same questions in the same order. Best when you want to compare responses across participants.
- Semi-structured: Start with a set of core questions, but allow for follow-up questions and discussion. Best when you want both consistency and flexibility.
- Conversational: Use open-ended questions and let the conversation guide the discussion. Best for exploring a topic and learning what matters most to participants, especially early in the research process.

Develop Your Questions

- Start with 5-10 core questions. Make sure each question connects to what you want to learn from the assessment.
- Make sure to include follow-up questions. Use prompts like “Can you tell me more about that?” to encourage participants to explain their answers and share more detail.
- Test your questions first. Try them out with a colleague before conducting the interviews or focus groups to make sure they are clear and easy to understand.

Step 5: Collect Responses

How you conduct the assessment will depend on the method you choose.

For Surveys

- Try to reach a broad audience. A larger number of responses can give you a more complete picture and make it easier to identify common trends and patterns.
- When sending outreach emails, make sure to keep the message clear and include a direct link to the survey.
- Plan for at least two reminders during the survey period. Reminders can help increase responses without overwhelming participants.

For Interviews and Focus Groups

- Recruit participants through your stakeholder contacts and partner networks. A personal introduction can make people more likely to participate.
- Consider the format based on your goals. Virtual sessions are convenient and can reach more people, while in-person sessions can encourage more open and detailed conversations.
- Schedule sessions in advance and send calendar invites with clear logistics, including the meeting link or location and what participants can expect.
- Aim for 5-8 participants per focus group. For individual interviews, 5-8 participants may be enough for early-stage research.

Step 6: Analyze and Act on Results

Once the survey closes, or you've finished your interviews/focus groups, the responses become the data for your analysis:

- Review quantitative results for patterns across user groups and product areas. Look for gaps in utilization, recurring barriers, and feature preferences.
- Code open-ended survey/interview responses for recurring themes and specific pain points. This includes identifying what audiences may be under-represented and need follow-up outreach.
- Use findings to prioritize product improvements, identify gaps, and shape future engagement strategies.
- Consider developing user personas/focus groups to represent distinct segments within your audience.



Example in Practice

Washington state conducted a needs assessment targeting community colleges during the second round of the Data User Insights Academy. The findings were used to develop user personas representing distinct groups within the community college ecosystem, which is a practical model for translating survey results into actionable impact.

Learn how to develop personas here.



Sample Questions Categories

A full sample questionnaire is available as a separate **resource**.

The categories and subcategories below provide a starting framework:

Understanding Current Utilization

- Frequency of usage
- Data Source
- Purposes and Applications
- User Experience

Understanding Challenges

- Barriers to access
- Barriers to utilization
- Unmet data needs

Understanding User Preferences

- Most useful features and functionalities
- Desired enhancements
- Preferred formats for accessing data

Understanding Participants' Background

- Role and organization type