Assessing Learning Needs:

Data Collection Guide for Community Organizations

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Thank You

This data collection guide was produced based on the processes and learnings from a pilot Needs Assessment project conducted in Alberta in 2020. We are grateful to the four organizations who participated, and provided their input, suggestions and guidance at different stages of this project. Thank you to Grande Prairie Council for Lifelong Learning, Hanna Learning Centre, Medicine Hat Immigration Partnership, and Wainwright Adult Learning.

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About this Guide

Community organizations need accurate and up-to-date information about adult learners and adult learning needs in order to plan for trainings. They also need information about local employers and their needs for workforce growth and training. To help support community organizations to independently collect and use this information, Rural Routes and NorQuest College consulted with four communities in Alberta to better understand what information is useful for this decision-making process. We then developed needs assessment tools—surveys and focus group questions—for use in and by communities. The tools help community organizations to identify opportunities to support adult learning and language training.

This guide is designed to support organizations to conduct the needs assessment in their communities. It includes a survey instrument and focus groups questionnaires, and provides recommendations, tips and additional resources about conducting needs assessments. This guide is intended to serve as a reference point and support capacity building within community organizations.

For more information about the pilot project conducted in 2020, please contact NorQuest College Research Office at research@norquest.ca.

What is Needs Assessment?

Needs assessments originated as a health services practice and are now embedded in social service planning at different levels, including as high-level assessments within municipal and provincial governments, and as operationally-focused assessments within multi-site organizations and individual service providers. In the context of adult learning, we can think about the purpose of needs assessment in broad terms: the goal is assess learning needs in the community at large. Needs assessments can also have a more specific purposes. For example, they can be used to identify a need for specific curriculum, program, or service. In terms of scope, a needs assessment can focus on a certain geographic area (e.g., town, municipality), or it can focus on a specific population group (e.g., newcomers or high school graduates). Sometimes needs assessments are conducted to learn more about those who are not accessing the services or are facing some barriers to access. These areas or populations are often referred to as "hard-to-reach." Defining the purpose and scope is a crucial step when planning a needs assessment, since it will inform the activities undertaken. The information gathered through needs assessment is then used to inform service planning and future strategic directions.

Needs assessments should not to be equated with evaluations of programs or services, although there is some overlap between these two practices. Evaluation is "the systematic collection of information about the activities, characteristics, and outcomes of programs to make judgments about the program, improve program effectiveness, and/or inform decisions about future program development" (CDC, 2012). Evaluation usually focuses on a specific activity and uses experiences with that activity to understand service gaps. A needs assessment addresses the needs in a community or needs of a specific group, drawing on experiences within the larger community context, as well as its current services, to understand service gaps. Both needs assessment and evaluation can identify the needs and gaps in services, however, their focus and purpose are distinct, as are the methods and approaches used to achieve the goals.

Although needs assessments are distinct from community outreach, it can be useful to think about needs assessment as one way to reach the community. When conducted by a specific organization, needs assessments can also inform community members about particular services and make them aware of the resources available in the community.

Guidelines for conducting community needs assessments often advise that multi-stakeholder working groups or committees be formed to guide the work. While this approach is the most comprehensive, not all organizations have a capacity to engage in such processes. Although formalized stakeholder input is ideal, where capacity cannot support this approach we suggest that organizations seek informal input from key stakeholders where possible. Multiple perspectives, even informally, can be valuable for thinking beyond current services or reaching "hard-to-reach" members of the community.

Needs assessments can be conducted by someone external to an organization (e.g., a consultant or a contractor). However, there is value in organizations conducting needs assessment on their own, since those working in an organization are familiar with context and can use existing networks and relationships to reach the local community. Even when external experts are assessing the needs in the community, organizations play crucial role in developing the plan for meeting the needs.

Taking into account that not all organizations have the capacity to lead complex multi-stakeholder working groups, and building on existing available resources, this Guide is structured to support organizations in conducting needs assessments, particularly with regard to data collection and analysis through surveys and focus groups. Alongside a variety of tools and methods for organizations to use as written or modify as needed (see Appendix 1-6), the Guide provides some tips and directions on how to handle data, review and interpret the information, and use best practices in reporting.

The Community Learning Needs Assessment Toolkit (2012) offers a comprehensive description of the needs assessment process while focusing specifically on community learning in Alberta. The templates and tools offered in this toolkit are great resources for organizations to use. This Guide is a data collection supplement to this and other existing resources.

Preparation & Desk Research

Planning – First Steps

Most organizations have limited resources and capacity. While it is possible to limit the scope and detail of a needs assessment, or expand it if resources are available, it's a good idea to answer a few basic questions before getting started. Things to consider include:

- **Assign Roles.** Many organizations do not have an existing staff member assigned to conduct needs assessments. To avoid confusion, rework, and frustration among any stakeholders included in the project, assigning roles including a lead can be very helpful. It's also helpful if the project lead has enough authority to make basic decisions about the project and can work directly with stakeholders, even if that authority is only in relation to the needs assessment project.

- **Establish a Timeline.** One way to restrict the scope of a project is to establish realistic timeline goals, and to know where you can be flexible and where you need to push forward. This can help with decisions like:

  - Which stakeholders are included?
  - In which cases will we extend deadlines?
  - Should we add or exclude a stakeholder group?
  - Will we advertise in advance, or simply launch data collection?
  - If interest exceeds our plans (e.g., too many people sign up for focus groups) will we turn participants away, or hold a second round of data collection?
  - How long should a survey stay open?
  - Can we keep our survey open longer?
  - How will we get more responses if response rates are low?

  The most challenging part of any needs assessment can be stakeholder engagement and partnership building. If an assessment includes only one organization, that organization will have more control over how and when things are completed. For multi-stakeholder projects, it can take a long time for partners to free up capacity to support the project and may take longer than expected to come to agreement about elements of the project. Things to consider:

  - Allow enough time for engaging partners in a meaningful way. This may mean several months of engagement and development ahead of your data collection (but perhaps only 1-2 hours per week or biweekly, allowing for response times).

    - Where possible, try to establish expectations for response times and contributions early on. Understand partner needs in terms of timeline and be clear about what you need. If possible, provide flexibility in the level of participation to accommodate various needs. Even where contracts or a Memorandum of Understanding are not necessary, it's helpful to write expectations down and share them among partners.

- **Know the Budget.** Although needs assessments can often be completed with existing resources, including staff time and office supplies, having a dedicated additional budget may allow you to improve the tools you use or support community members to participate in your study. If it is available, consider how to use your budget in advance.

  Common additional costs in data collection include: online survey tools (free versions are also available, but have different features); printing paper surveys or posters; food or beverage supplied during focus groups; any prizes or incentives offered for answering surveys or attending focus groups; support offered during participation in focus groups, such as for travel or child care; and travel costs associated with bringing your partners/stakeholders together during project planning and development.

Gathering Existing Information

Community organizations already possess a wealth of knowledge about the local community. It is important that the needs assessment project draws on this knowledge and incorporates it into both the design of the project and the interpretation of results. We call this work *desk research* or *secondary research* because the information is already available—through records, employees, close stakeholders, or existing needs assessment work—and does not need to be collected from community members.

Before starting the project, it can be helpful to make a list of what you already know, what you are assuming, and what you still need to know. In general, when conducting a needs assessment, we start by gathering the information from those closest to the organization (staff, clients) and then try to reach the broader public.

Service use statistics and other administrative information already available to organizations are important to inform the direction of a needs assessment. Some questions to consider in the early stage of planning:

- How many people are currently using the services and programs offered by our organization? What are the common characteristics of our service users? Currently, who we are not serving?

- What does our social media data say about our online interactions? What do people interact with? Who is engaged already? Often, summaries of this data are available through an organization's social media accounts.

- How are our services and programs structured? Some aspects to consider include: scheduling, accessibility, location, online access, and the languages in which services are offered. How could we offer our programs in a different way? What would that look like?

- What is our capacity to offer existing services differently or to offer considerably different programs and services? While it is beneficial for an organization to learn about broader needs in the community, needs assessment is most useful when its scope addresses aspects of service that are realistic possibilities for the organization and local community.

Desk research also includes learning about other needs assessments in the local community (by organizations, post-secondary, employers, etc.). Often, these organizations will share their results with you, which helps to avoid duplicate work within a community. This saves you work, but it also helps limit the number of times the community is asked the same questions (that can be tiring!). There may also be opportunities to partner with other organizations who are interested in answering the same questions. This can distribute the workload for organizations. Having the same dataset will also make it easier for organizations to coordinate their work so as to limit duplication of services, or to streamline pathways between organizations.

There are also public sources that can inform program planning. It is important to explore the public sources of information in advance of starting your project. Doing so will allow you to design shorter surveys that only address the missing information. Shorter surveys are more likely to be completed by community members and take less time to develop, analyze, and report.

Data may not be available for your specific community. However, data from larger regions, such as Alberta, or Canada, are often easily accessed by the public. Look for ways to explore the data in a way that gives you some insight, such as filtering the information to rural sites, or to new immigrants, or by other factors depending on your community and program.

Desk research compiles what you already know about your community and services. Following, you will have identified information gaps and, by necessity, have made some early assumptions about the community. Needs assessment research should focus on those items that you are assuming and those that you still need to know. It is important to include assumptions in research for program planning. While it can be disappointing to discover assumptions are inaccurate, decisions based on false assumptions can result in wasted funding, resources, and effort. Some common assumptions about users include: access to vehicles, access to public transit, physical abilities, income levels, language levels, childcare needs, literacy levels, technology literacy, program interest, demographics, or industry needs.

It is best to approach desk research with specific questions in mind. Otherwise, it is easy to become overwhelmed by the amount of data available. Think about what is helpful to know about your community, and seek out those answers. Along the way, you will also find other interesting pieces of information that may be relevant and help generate new questions.

For a list of publicly available databases that can inform community needs assessments, see Appendix 2.

Surveys

Survey development takes a lot of time. In the Appendix 4 and Appendix 5, we have provided sample surveys that can be modified to meet the needs of your community. Some proposed modifications you might want to consider:

- Leave out the questions that are not relevant for your local context.
- Introduce new questions as needed.
- Adjust terminology to ensure that the survey matches the language used in your organization/community (e.g., some communities refer to foundational skills as life skills)
- Include questions about specific projects or initiatives as a way to assess awareness or interest in the on-going services. This may include core services, support services, or approaches to reducing barriers (e.g., child care offered on site or a new citizenship preparation course)

There are many online survey softwares available and some of them have free versions you can use to build and distribute your survey. The commonly used survey tools include Google Forms, Survey Monkey, Qualtrics, and Lime Survey. If there is capacity to develop it, organizations can also create surveys that are hosted on their organizational websites. Especially with free tools, be sure the version of the survey software provides the features you need. Limitations in access, such as having a limit to the number of responses, no reporting features, or limited access to the raw data (usually an excel version) may create challenges for your project.

In addition to conducting online surveys, consider distributing a paper-version of the survey. Paper-based surveys will provide access to participation for those who might not have access to technology or to internet. It is important to coordinate paper-based surveys in a way that minimizes possible duplication resulting from community members taking the survey multiple times. Also, keep in mind that paper-based surveys require extensive coordination and considerable resources for data collection and data entry. Based on experiences in your local community, weigh the pros and cons of conducting on online survey versus a paper survey: will you reach the right people online? Can your paper survey be administered outside your organization, to reach new people? And if so, who will collect the surveys and enter the data? If there is a specific community you are trying to reach, collaborating with stakeholders that work closely with the community will help you understand if your assessment questions are best answered online, on paper, or through a face-to-face interaction like a focus group.

Focus groups

Focus groups discussions can be a good way to learn about opinions, common experiences, and help guide future action. In a focus group, participants give more detailed information as the group comments bring to mind new ideas and stories. In Appendix 6, we provide question guides for focus groups with community members and employers. You can modify the questions to better suit the needs of your organization.

While focus groups have been traditionally conducted in person, there are now online platforms that can be used effectively for group discussions. Some of these platforms also allow participants to join the discussion by phone or chat. When considering online focus groups, think about access and technology skills in your community. While some community members might not have access to technology, some others might find online focus groups easier to access, because they usually take less time and can mitigate some barriers (e.g., travel, physical, childcare, or social anxiety). Organizations that plan to hold multiple focus groups can consider offering one focus group in each format, addressing barriers and preferences for both these groups of potential participants.

Focus groups for different stakeholders should always be held separately. When one stakeholder group is in a position of power over another stakeholder group (e.g., managers and employees), participants may alter their responses to prevent conflict in their daily life. This means the data may not accurately reflect the participants' experiences. Consider the power relationships between stakeholder groups and, for example, plan to host one focus group for the general public and one for employers. Note that everyone, including employers and those working in other community organizations, can be welcomed to the general public focus group. However, during the discussion you might need to remind individuals to speak from their own experience (as a community member, rather than on behalf of their organization). Similarly with surveys, stakeholders representing certain organizations can be invited to take the survey for the general public/community. Employer participants, for example, might bring a different perspective when talking about their experience as a community member.

When it comes to access for focus groups, it is a good idea to try to remove barriers that might exist to actual programming (if possible, provide child care for in-person attendance, ensure that the space is accessible even if it means hosting outside your organization's building, and offer flexible scheduling). Removing as many barriers as possible can help attract participants who are not usually accessing your services, revealing unmet needs within the community. Because focus groups require a time commitment from participants, and travel if hosted face-to-face, you may also consider providing an incentive (a gift card or similar) to help you recruit participants and to cover costs to attend.

Be explicit and transparent with participants about the purpose of the focus group and how their data will be used. Usually, an audio or video recording is made of focus groups, allowing facilitators to focus on discussion and record notes at a later time. It is important to inform participants how the recordings will be used, what the purpose of the discussion is, and how they will be identified in reports and records.

Focus groups require a trained facilitator who can stimulate discussion to provide rich insights. Keep in mind that a focus group is not only a way of collecting information, but an opportunity to generate new insights, learn about ways of thinking, uncover details about a certain issue, and learn about the nuanced opinions community members hold about issues, barriers, programs, and services. While focus groups and surveys can both answer similar questions, usually surveys focus on *Who* (e.g., who needs access to our services) and *What* (e.g., what types of programs are needed, what is the most convenient mode of delivery), while focus groups can help us unpack the *Why* (e.g., why is online learning not seen as convenient).

To elicit richer responses in a focus group, prompt participants to think about different options and to freely express their opinions. During discussion, two complementary understandings can emerge: one, the opinions of specific individuals; and two, the common understanding shared between all participants in a room.

Some ways to elicit richer responses to explore the shared understanding include:

- Prompting participants to consider different options. For example, if participants express strong and definitive opinions about online learning, introduce the idea of hybrid learning and ask participants how that fits into their understanding of learning.

- Ask participants to think about their immediate community. For example, when asking where community members can find information about learning opportunities, ask what they think, but also where they notice friends and family are learning about the opportunities. This will guide participants to reflect on the broader practices or views in the community.

- Introduce opposing views as if they are coming from outside the room (e.g., Some people think that the younger generations are digital natives. Do you agree with that? In your opinion, do young people need training in how to use technology?)

English as a Second Language Participants

It can sometimes be challenging to reach English as a Second Language (ESL) participants during recruitment. Also, research can be challenging for ESL participants, and can result in lower response rates within this group if your survey or focus group questions are not designed with these participants in mind.

In recruitment, leverage the places and organizations that ESL speakers use the most. Consider recruitment venues that may feel unconventional, such as corner stores, fast food chains, barbershops and restaurants. These venues are both used by and often staffed by ESL speakers. Additionally, try reaching out to immigrant-owned businesses, or to day cares to reach parents and caregivers. Finally, you can also monitor other projects related to immigration not only for data related to immigrants and ESL speakers, but also for recruitment ideas. In some cases, it may be appropriate to reach out to project leads who are or have completed work in your region.

Consider a variety of language levels in written work and be prepared to adapt your communication in face-to-face interaction. Often, research questions include multiple clauses, uncommon words or wording, or the flow between questions can unexpectedly change topics. These elements can be challenging for participants who are learning English. Making changes to include ESL speakers will improve your communication materials and data collection tools and make them accessible to a broader audience.

Some possible ways to improve your data collection and remove barriers to access in relation to language:

- In focus groups, rephrase questions when participants struggle. Make the question specifically about them and use shorter words. For some speakers, it is helpful to avoid hypothetical or conditional language (e.g., words like "if" or "would"). For example, instead of "What programs do you think are important if people are preparing for employment?" we might ask "What course will help you get a job?"

- In focus groups, repeat back responses in a simple manner and get confirmation of meaning. ESL speakers' skills vary. Some may have stronger listening skills than speaking skills.

- In online focus groups, consider turning on captions (if they are available) and keeping chat options open, to provide a variety of communication options.

- In surveys, provide definitions for terms or examples to illustrate concepts.

- In surveys, keep questions short and to the point. Avoid using multiple clauses in sentences (e.g., avoid anything requiring a comma).

- Ensure that the reading level is appropriate and use plain language whenever possible (we included a resource on readability in Appendix 1).

Recruitment and Advertisement

Recruitment is the process of inviting community members to participate in your needs assessment. Generally, recruitment is heavily focused on *advertising* and answering questions about the project.

When conducting needs assessment recruitment, it is crucial to rely on existing networks and relationships. However, it is equally important to try to reach those outside of our existing networks. Otherwise, our project may be limited and influenced by what is most familiar, and this can create an "echo chamber," an environment where certain opinions and beliefs are taken for granted and or where ideas are repeated between those already holding those perspectives without drawing in new information.

When conducting a data collection, team members should be assigned to respond to inquiries and send out invitations and reminders. All existing channels of communication can be used to advertise the data collection. This can include mailing lists, contact lists, events, learner databases, social media platforms. Data collection requires the whole organization to coordinate, including areas such as outreach, program development, coordinators, instructors, and marketing professionals—it is best if all different functions in the organization support recruitment by sharing information within their networks.

While it is recommended that the beginning and an end dates and times for data collection be pre-determined, it is a good practice to assess the response rates and adjust the strategies during the data collection. If recruitment is slow, or you are not reaching your target audience, consider extending your timelines and trying new recruitment channels.

To reach as many community members as possible, we are proposing a multi-pronged approach. Some suggested channels for advertisement and recruitment include:

- Regular newsletters at your organization or in your community;
- Social media: Facebook, Twitter, LinkedIn, Instagram, Kijiji, Reddit, or any other channel used in regular communication with the community;
- Contacting community partners, local employers, or local institutions, including immigrant organizations, social service organizations, local municipalities, chamber of commerce, local libraries, places of worship, Rotary Club, Lions Club, or known local hangouts for your target group, such as barber shops or restaurants;
- Sharing information on your website;
- Mentioning the project at meetings with multiple community partners and getting the project on the agenda so it is in the records as a reminder, if possible; and
- Assigning an organization's affiliates to serve as ambassadors and promote the needs assessment and its importance.

Advertisements are best when they make it easy for people to join your project and make clear the purpose of participation. When advertising the survey, include concrete and illustrative examples of actions that you think will result from this survey in your organization (e.g., this information will inform strategic planning, help shape programming, help us reach more people, etc.). Adjust the messaging to use the tone that you usually use to communicate with the community and employers. Feel free to use your voice and edit the message while trying to ensure that key information is highlighted. Where possible, try to balance online presence and physical presence to reach diverse members of your community. Physical presence can include face-to-face announcements (such as at a gathering), physical posters, or information flyers for people to take home.

Each advertisement should include the full details of participation. Make sure to include links to the survey or online focus groups, links to information sites (if available), dates and times for focus groups, registration instructions, and contact information for your designated staff member responsible for answering questions. If you are offering child care, food, or incentives, these can be added to your advertisement. Also consider noting accessibility options, such as physically accessible spaces or the availability of technology and/or interpreters to support those with communication barriers or disabilities. If you make it easy to participate, more people will be interested in your project.

Some things to avoid wherever possible include long survey links that are difficult to copy (try using a link shortener like www.bitly.ws), hyperlinks that may not be visible to screen readers (type out the whole link), and unnecessary registration requirements. It is a good idea to request registration in focus groups, as it helps with planning of snacks (for face-to-face) and provides a way for you to remind participants about the date and time of the event or provide additional information about parking or transit.

Privacy and Confidentiality Issues

Researchers will often make their work confidential and in most cases this is the best approach to protect both researchers and research participants. In cases where the data collection is not confidential, the community organization should make that clear to all needs assessment participants *in advance*. It is a good rule to simply be sure that everyone involved in the project understands how they will be identified in both the information gathered (e.g., information stored in your records) and in reporting (e.g., if names are published in the report).

Awareness of privacy and confidentiality issues in your needs assessment process is important for two reasons:

- It is important to protect community members when they share their opinions about local experiences. Participants should not experience negative outcomes resulting from sharing honestly and openly in your project. Depending on your project, opinions shared may influence an individual's standing in the community, their employment, or their family.

- Having solid procedures for ensuring privacy and confidentiality in turn makes participants more comfortable with sharing openly and honestly. It means you will receive better information from community members. It also reduces the likelihood you will get false or misleading information, and opens space for follow-up questions, clarifications, or for people to give specific examples to help you understand their experiences.

It is good practice to establish privacy and confidentiality procedures that protect participants, even if you do not feel the questions you are asking are controversial. Sometimes, questions lead to surprising answers, more questions, or sharing of information that is highly personal, particularly as people give examples from their own lives. Establishing procedures in advance and making sure all team members understand the process will ensure that such surprises do not lead to negative outcomes and will help you collect quality information.

Protect Documents and Files

Consider the various ways you can protect research information in advance of launching the project. Clear roles and responsibilities will reduce the risk of issues arising and will provide you with clear answers to questions about how information is handled, which may arise from the community.

Administrative Protections

It is best practice to limit access to records such that only those who need the information have access to it. This may mean that one or two people have access to everything. Or, it may mean that some people have access to everything, but others only have access to de-identified data and cannot access contact lists. Limiting the number of people who have access to contact information and names, in particular, can reduce the chances that this information will be shared or reported inadvertently.

Physical Protections

Physical materials of research include paper records, notes, contact lists, printed research data collected, laptops/computers or external drives where information is stored, or any other physical item storing information about or collected from community members. These items are best stored in locked cabinets (e.g., for paper records), or locked offices, away from the public and individuals who do not require access.

You can increase security by storing names and contact lists separately from the research information. This makes it more difficult to connect specific responses to specific people if your records are accessed. Consider separating those items using different electronic folder locations or locked physical cabinets to store them.

Passwords and Electronic File Safety

Whenever possible, store data on a password protected computer or drive. Do not upload it to file storage that is accessible to the public. Try to limit the number of people who have access to the original information.

Password protect data before emailing it.

- How to for Excel: https://support.microsoft.com/en-us/office/protect-an-excel-file-7359d4ae-7213-4ac2-b058-f75e9311b599
- How to for Word: https://support.microsoft.com/en-us/office/protect-a-document-with-a-password-05084cc3-300d-4c1a-8416-38d3e37d6826

Final reports do not require password protection. They can be distributed on paper, by email, or posted publicly as needed. PDF versions are ideal because they are more difficult to edit but can still be read by screen readers and are small enough to post online or circulate by email.

Collecting Demographics

Some participants feel that demographic information is a form of identifier. Indeed, if there are only a few people within that demographic in the community, then this information can specifically narrow the results to that group.

It is best practice to only collect demographics that can be addressed in your results. Desk research often provides enough demographic data for general interest and planning. Demographics such as gender, dependents, or first language can be useful if you plan to offer gender-specific programming, child care, or translation services, respectively. Think about what is possible in the programming and choose demographic questions carefully.

Since some participants may not wish to disclose their demographics, it is best practice to always provide a “prefer not to answer” response option for these questions. Additionally, it is helpful to place demographic questions at the end of the survey. In focus groups, avoid assuming demographic information. If you would like to describe who participated in the discussion, the best approach is to distribute a short questionnaire during the focus group, including questions such as gender, immigration status, employment status, or similar as needed. It is important that this information is collected separately from personal identifiers such as name or address that may be collected for follow-up or to distribute incentives. It is also important to ensure collection is conducted in a way that does not require participants to share the information with other participants who are attending (e.g., have a separate form instead of asking for this to be shared as part of discussion).

Making Identified Data Confidential

Sometimes, we know who gave what response in our research project. That is a normal part of research. Once the data is collected, we can protect participants from two risks:

- That an unauthorized person accesses or shares the information about which people participated or which individual gave which answer.
- That researchers may have biases they are unaware of and that this might influence the way they analyze the data.

Both risks can be addressed by separating personal information from the data before analysis and storing these two parts separately.

Some possible steps to improve confidentiality in your project include:

<table>
<tr><th>Privacy Risk</th><th>Possible Responses</th></tr>
<tr><td>Contact list includes names, emails, phone numbers or other identifiers.

Contact information was collected in the survey.</td><td>Unless you have permission from the members of the list, do not share contact lists outside your organization.

Do not create reports that include contact information.

Separate contact information from survey results as soon as you can.

Store contact information separately from survey results.

Password protect contact lists.</td></tr>
<tr><td>Focus group participants have a conversation with a facilitator. Everyone present is aware of who attended.</td><td>Before you start the discussion, ask focus group attendees not to repeat information, names, or stories that were shared during the session.

Store any lists of attendees or contact information collected during the session separately from the notes, audio recording, or transcriptions of the discussion.</td></tr>
<tr><td>In a focus group or survey comment, identifying information is collected as part of discussion / writing.

For example:
Participant names
Name of a friend or family member
Name of employer, school, or group
Location of their home
Detailed descriptions of a unique experience that can be linked to that person
Demographic information that was not specifically requested
Participant has a particular manner of speaking or writing.</td><td>Do not include identifiers in reports.

Identifying information (e.g., names of participants or employers) can be removed from the records before analysis. Replace identifiers with generic terms and store the modified data. Examples of generic terms are given in square brackets:
Darla → [participant name]
Shasta → [name of boss]
Superstore → [employer, retail grocer]
McDonald’s → [employer, fast food industry]

Avoid reporting comments or phrases exactly as they are given. Instead, interpret the response and re-write it in a generic way.</td></tr>
</table>

Small demographic groups can identify participants. • **In a community that has 1-2 families from Syria, reporting that a participant is from Syria would tell readers familiar with the community that one or the other family participated.** **Identifiers can also be created when demographics are combined. A community may have a large Syrian population and a large business owner group, but if we then say "Syrian business owners," the reporting will refer to only a handful of individuals.**	Collect as few demographics as possible. Only collect demographics for groups for whom you will be able to create changes or make recommendations. Only report demographics when there are 10 or more responses in that group. For example, to identify Syrian business owners in a report, ensure you have collected data from 10 Syrian business owners.

Storing/Destroying Data After Use

Once the final report is complete, it is a good idea to store the original data. You may need the data in the future for additional analysis or in cases where someone raises questions about your reporting. Good practices for data storage include:

- Plan to store all records for five years after the report is completed. When storing records, mark them with a date to be deleted or destroyed.
- Make digital records of paper documents, if possible. Then, destroy the paper records by shredding them. Never put research materials that have not been shredded into recycling.
- Store any remaining paper documents in a locked cabinet.
- Password protect electronic documents.
- Store contact information separately from research information.
- For survey data, store both the original data and the final data used for reporting.

Risk in Research

Community needs assessments are usually low-risk projects. "Low-risk" means that research participants are not being asked to do activities that are much different from their regular lives.

We recommend the same level of protection for privacy and confidentiality for all needs assessments because it helps ensure safety for both researchers and participants. Sometimes, results can be surprising and establishing good processes in advance is the only planning you can do for something you do not know will arise!

One other way to reduce the risk in your research is to only collect information that is relevant to program decisions. For example:

- Avoid highly personal questions, such as those around mental health, sexual activity, or historical trauma. These can pose a risk to participants. If you are considering programming related to sensitive topics, you can ask about supports and programs are needed for those issues, rather than asking personal questions.

- Do not collect specific health information. Questions like “Do you have a family doctor?” are okay, but “What issue did you discuss with your family doctor” is problematic.
- Only collect demographic information necessary for the work.
- Avoid collecting information for the sake of interest. The best research answers specific questions and provides information that leads to action or planning.

Analysis

Just in case!

It is a good idea to preserve an original copy of your data. Copy your original data so you have two identical files. Save one marked as original data. Use the other copy to conduct your analysis. If there is an error during analysis, you will always have a backup!

Survey Analysis – Using Built-in Reports

Most survey software comes with at least one built-in reporting tool. Most are pretty simple and offer useful features for basic analysis. These are great for getting a summary of your results. They are more difficult to use if you are seeking a more detailed analysis. For detailed analysis, you may need to download the dataset and work with it directly.

Some tips for using built-in reports:

- Limit the results to include only "completed" responses. "Completed" means the person clicked the submit button at the end of the survey. If you include all responses, your data may be skewed by responses where people opened the survey but did not answer any questions or where they stopped the survey half way through.

- If possible, change the settings in the report to show percentages. It is easier for most people to understand numerical relationships when they are out of 100. If 15 people reported "yes" and 23 people reported "no," your chart will show 39% "yes" and 61% "no."

- Find the feature called "data labels" and turn it on. This will display your % number directly on the charts.

- It's best not to include comments in auto-generated reports. Most survey programs will allow you to remove those questions from your reports. Best practice is to use the comments to write up a short paragraph to summarize the results, and attach it to your auto-generated report.

- Most survey programs include a feature called "filter." Filter allows you to view responses to the entire survey that are limited to the response given on a previous question. For example, if you ask participants to report their gender, you can filter your report to view only women, only men, only non-binary, or combinations of these groups. Some programs allow you to apply multiple filters. Experimenting with these options is an easy way to few different aspects of the data without manual analysis.

- All survey programs have very robust online documentation and support. Skimming over the reporting section of those documents can give you ideas about what is possible and might provide a new idea for filtering or breaking down your data.

Survey Analysis – Working with Downloaded Data

In the results section of online survey programs, there will be an option to download data. For most organizations, a format compatible with spreadsheet programs will work best. Look for .csv .xls or .xlxs formats. These will all open in Excel, as well as in other common spreadsheet programs.

When conducting your analysis, it is a general principle to make all calculations based on the number of responses to a particular question, rather than based on the number of responses to the survey as a whole. Participants can skip questions they do not wish to respond to, may miss a question, or may stop the survey early. If you use the total responses to the survey, your results may be misleading.

Yes/No Questions

In Yes/No questions and other single choice questions, options are presented with a circle or a radio button (o). For these questions, participants can only select a single response.

Calculate the percentage of Yes/No responses using the number of participants who responded to that question. Note that because this is a single choice question, the percentages will add up to 100%.

Question: Do you know where you can use public computers and internet in your community?	**Number of Answers**
Yes	158
No	62
Not Sure	12
Total	232

Calculations:

- 158 Yes answers divided by 232 total answers = 68%
- 62 No answers divided by 232 total answers = 27%
- 12 Not Sure answers divided by 232 total answers = 5%

Double check: the % results should add up to 100% in yes/no questions.

- 68% + 27% + 5% = 100%

Multiple Choice, Check All That Apply Questions

In multiple choice questions, options are presented with a radio button (o) if participants can only choose one response, and with a square button or a check mark box (□) if they can select more than one response.

Multiple choice questions can allow participants to select more than one option, often called "Check All That Apply." For these multi-answer questions, look at the total number of participants who responded to that specific question. In this case, the percentages will usually exceed 100%.

For example:

232 participants responded to this question below. Because participants checked more than one answer each, the total number of answers is 408. For each of the options, you will calculate the percentage by looking at how many respondents selected this option, out of the total number of those who responded to this question. Because participants can select more than one option, the sum of percentages will exceed 100%.

Question: What type of learning opportunities are you interested in? Check all that apply.	**Number of Answers**	**Percentage: number of answers divided by 232**
Reading and writing (literacy)	44	19%
Math and numbers (numeracy)	22	9%
Life skills	18	8%
English as a second language	14	6%
High school upgrading/GED	105	45%
Technology and digital skills (e.g., courses in computer use)	163	70%
Certificate, diploma, degree, trade	12	5%
I don't know	23	10%
Other, please specify [text input]	7	3%
Total	408 (by 232 people)	

The calculation provided above is the approach you can use when you wish to present what percentage of participants selected a specific option. It tells you how many <u>people</u> thought the choice was important.

Another approach is to calculate the percentage of all choices. In the example above, this would mean calculating: number of answers divided by number of total responses (number of answers divided by 408, in the above). This second approach answers the question "how common is this choice selection in comparison to all the other choices?" It focuses of frequency of response, rather than the number of people who thought it was important. That is, it takes into account how many choices people make: if each person only selects one choice, the percentage will be higher (it's more important to them if they select one priority than if they select five priorities). It is important to note this distinction in reporting and make it clear which method you have used.

Likert Scale

A Likert scale is used to provide ratings or rankings. Likert scales provide an equal number of positive and negative responses, and sometimes offer a neutral middle answer. These are a type of multiple-choice question where participants can only select one response. Common versions of Likert scales appear below:

Satisfaction Likert	**Difficulty Likert**	**Likeliness Likert (with neutral middle response)**
Very satisfied	Extremely easy	Very likely
Satisfied	Very easy	Likely
Dissatisfied	Easy	Neither likely nor unlikely
Very dissatisfied	Difficult	Unlikely
	Very difficult	Very unlikely
	Extremely difficult	

For questions that use Likert scales, we look at the proportion of participants who responded positively compared to those who responded negatively*.* Middle neutral choices can be included in the positive or the negative or kept separate. It is up to the researchers to choose, but it is best to be consistent in approach across all questions.

For example:

Participants were asked to rank their need for three programs on a scale from high need to no need. They can also say they do not know (these are excluded from analysis—consider them as if the participant skipped the question).

Calculate the percentage responses using the methods described above for multiple choice. That is, the total specific answers divided by the total number of answers to the question. If 232 people responded to ESL language training below, and 27 said they have a high need, then we calculated 27 divided by 232 = 12% identified a high need for language training.

Question: What types of training or courses do your employees require to advance in their current jobs?	**High need**	**Moderate need**	**Low need**	**No need**	**Double check (each row totals 100%)**
English language training	12%	54%	10%	24%	100%
Reading and writing	33%	23%	17%	27%	100%
Math and numbers	72%	11%	15%	2%	100%

To find the total number of people who responded positively, add the positive numbers together. In this case:

- English language training: 12% + 54% = 66%
- Reading and writing: 33% + 23% = 56%
- Math and numbers: 72% + 11% = 83%

The results show math and numbers is the most needed course, followed by English language training.

Open-Ended, Questions & Text Responses

For open-ended responses, it is a good idea to read through all the responses before sorting or grouping. This gives you a general sense about the content of responses.

One way to approach open-ended questions is to group the responses thematically (for example, positive or negative, types of barriers experienced). For richer insights, identify topics, ideas and examples that come up repeatedly. For example, what are the commonalities in responses? Are participants commenting on different aspects of the training format?

Once the material is grouped together, try to describe the responses accurately in a paragraph. Give the most emphasis to the themes or topics that come up the most often. To show that one response group was more common than others, use qualifying words to show frequency. Doing this also helps to prevent bias, helping the researcher to make clear which responses are most important in cases where results might be challenging to address:

- Most participants felt…
- However, some also felt…
- Fewer participants wrote that…
- Two participants described…
- One person suggested…

Sometimes in open-ended questions, participants share their personal information such as where they work or where they moved from. Leave these details out to protect a participant's privacy and prevent inadvertently disclosing who took part in your study. If you need to keep the details to illustrate a point, you can change some details (for example, replace "Ontario" with "another province" or "MacDonald's" with "a fast food place").

Interpreting Survey Results

"Representative" Data

Often, researchers will receive comments that their work is not "representative." In this section, we explain why representative datasets are usually not achievable in needs assessments and what this means for your project.

Needs assessment surveys are necessarily distributed widely. Without knowing the exact distribution numbers, it is difficult to know how many people who received the link and participated in the study. So, it is difficult to calculate response rates or confidence rates—statistical terms that help you understand how well your data reflects the population. For needs assessments, it's best to assume the data is not "representative." This term can be confusing because the word "represent" has two different meanings: one for statistics and one for general use.

Even though we cannot calculate the response rates and confidence rates, needs assessment data is still very useful for decision-making and program planning and it still reflects the needs and opinions of the community. Still, it can be helpful in reporting to keep in mind what the results represent. There are two ways of understanding if survey data accurately represents an audience's opinion.

- Statistically representative data: this is a statistics term. It means that if you have a high enough response rate and confidence rate that it is possible to say your data represents your entire audience (those who responded as well as those who did not respond). If you did the study again under the same conditions, the results would be the same within a small margin. In this method, it is possible to look at a number by itself—just one measure at a time—and say the number represents a certain opinion or program impact. In needs assessment surveys it is not possible to achieve and calculate this type of representation.

- Representations of participants' experience: the needs assessment surveys accurately represent the opinions of survey or focus group participants. We expect that the results also represent the opinions of those who did not participate in data collection. However, we cannot determine mathematically how accurate we are in that assumption. So, we can only say with 100% confidence that the results represent the opinions of those who took the survey, and we can expect that if we did the survey again under the same conditions that there would be slight variation in the results. For that reason, when interpreting results, we should be cautious when reporting on individual numbers, keeping in mind that the results only represent a subset of the total audience. In reporting, it is helpful to write "survey participants felt…" rather than "our community members felt…" in order to clarify what is represented in the data.

Organizational Knowledge to Support Interpretation

When interpreting results that focus on survey participant experiences, it can be helpful to draw on program expertise and organizational familiarity within the local context. In this way, we can gain additional understanding about what the data means to the audience as a whole.

For example, knowledge of the format of services or the content of workshop delivery can support the interpretation of open-ended comments. Because of the relatively small number of respondents in needs assessment surveys, a handful of negative responses can give a false idea of the overall picture. Keeping the overall number of responses to a question in mind when interpreting results can also help clarify the meaning of each measure.

Finally, given that the number of responses is relatively small, the analysis of check-all-that-apply data may pose a challenge. It is again useful to consider this data in context, but may also be helpful to focus analysis on the top two or three aggregate responses. In reporting, you may also report the number of responses to each category in order to help the reader understand how one or two responses can seem to sway the results rates by large percentages. If response rates are very low for one or more options/services, drawing on the comments given by survey participants who checked that option may assist with understanding the user experience more so than the specific measure result.

Reporting Low Response Rates

In communities of all sizes, response rates can be a challenge. While all data can be useful, even in small numbers, it is best to use caution when calculating and reporting small numbers. “Small numbers” refers to the overall response rate in your survey, or the number of people who attended a focus group, but also any demographic groups that you isolate in analysis.

Reporting results with very low response rates can result in inadvertent identification of your research participants and/or misleading data. For example, with only 10 responses, a single negative response can drop a satisfaction rate by 10%. With only 4 responses, a single negative response lowers the rate by 25%. In determining the needs for a community, need or lack thereof can be exaggerated similarly when response rates are very low.

Some best practices include:

- Avoid reporting survey responses if less than 7 responses were collected.
- Avoid presenting charts with fewer than 10 responses.
- Avoid reporting demographic analysis if there are fewer than 10 responses for the group.
- Report the number of participants as well as the results for each measure.

Analyzing Focus Groups

Once focus groups are completed, you will have focus group notes and recordings. When conducting focus groups, researchers usually transcribe the recordings from focus groups entirely, which allows them to have a detailed overview of what was said and in what context. Transcripts are usually supplemented with researcher’s notes that look closer into the dynamic between the participants and other observations from the focus groups. Transcribing can be a lengthy and expensive process. As an alternative to transcripts, detailed notes developed by watching recorded sessions can be used to analyze the focus groups material.

When analyzing the focus group, some considerations to remember include:

Themes: like the analysis of open-ended questions, focus groups can be analyzed using themes. Themes can be developed for each question or topic area discussed. However, themes are best understood if wider contexts are taken into consideration.

Context of data collection: consider both the immediate context (during the focus group; interpersonal connections or tensions; power imbalances that might impact responses) and the wider community context (e.g., municipal, funding, or unemployment changes).

How participants respond to others: carefully examine what has been said and in response to what question and how participants react or respond to each other's discussion. Sometimes participants shape their answers in response to other participants or in response to a dominant view about an issue, even when it is not expressed in the room.

Identify nuances within the views expressed: different participants may repeat or agree with another's response but provide slightly different perspectives that can be valuable.

Consider the speaker's position within the community: people will often express needs in ways that reflect only their limited experiences; accounting for this in analysis, where possible, can keep comments in context. For example, employers may not only stress skills that are important for their specific organization. Discussions may also reflect a level of bias related to the value of certain skills sets, the skills sets of certain populations, or opinions about what level of responsibility employers have to develop their staff professionally within the organization.

Data is always best understood as an aggregate: this is true for both surveys and focus groups. Although focus groups have more direct connections to individuals in analysis and reporting, it is best not to take individual responses as definitive and complete reflections of community needs. Try to contrast and relate the responses of multiple participants to create a bigger picture and use individual responses as illustrative examples.

Turning Data Into Action

Keep It In Context

Return to the desk research you compiled at the beginning of the project and rely on the local knowledge of the team within your organization. Without this context, it is difficult to understand what actions could result from the data.

Keep in mind that many barriers to access are due to the broader social context (poverty, lack of affordable child care, lack of access to transit). Identify actionable items, something that can be changed and implemented within the organization, while keeping the broader social context in mind. For example, if participants are not able to access the programs because of a lack of transit, can the programming be offered at a different location? Is online delivery an option?

Here is an example. It is simplified and slightly exaggerated to provide a clear illustration of how context can influence the actions taken.

- Participants identify a lack of access to books.
    - Without context, we might simply say the town needs a library or bookstore.
    - Within context, we might note that there are two libraries. However, desk research showed that employment in the town is primarily agricultural shift work, with workers starting and finishing at 6am and 6pm. Municipal websites show that transit routes to the libraries stop running at 6pm, and don’t start again until 6am. Anecdotal knowledge among your staff suggests that most shift workers in the town do not own vehicles, but instead carpool to work or share vehicles within the family. Many workers identified childcare responsibilities in the evenings on a survey conducted locally. So, rather than needing more libraries, the community may need to address childcare, transportation, and service hour barriers in order to increase this access. To create action from this analysis, consider what ways the organization can resolve those barriers and what limitations exist within the organization. Actions can involve sharing information—in this case with local municipalities and libraries—or it can involve direct services, such as book delivery, hosting library holds after hours, or forming a bi-weekly library visitation club.

Rank and Prioritize, with Context (again)

Especially in surveys, we end up with lists of issues, training gaps, or barriers that need to be addressed. Our first step is to rank results according to how often they were reported. If 85% of community members identify language and literacy barriers, but 54% identify numeracy barriers, this rank order would prioritize language and literacy programs. However, context may shift your prioritization. If your research also reveals that community members urgently need training geared toward employment, and employers have identified numeracy as a top priority, you might consider ways to address numeracy training for employment while incorporating some language and literacy skills.

There is value in considering the ways that actions can address multiple barriers through a single initiative. In the same way that numeracy training can incorporate language and literacy skills, other actions may address multiple identified issues.

If you are having difficulty ranking and prioritizing your results, consider creating a few charts from the data and sorting them. When data is visualized, the answer sometimes jumps off the page. Especially where differences may be smaller, a visual representation can help us imagine how the data points relate to one another.

Consider breaking data down into smaller pieces, to see if the needs identified impact one group more than others. You can look closer into needs by any factors available in your dataset. You might find, for example, that social programming is most requested by participants with young families, leading you to develop family programs. Or, perhaps the "history" classes were only requested by new immigrants to Canada, leading you to explore whether or not participants are actually seeking citizenship test preparation.

Finally, it's important to make sure that action is feasible for your organization while also planning for the future or partially resolving barriers or gaps that can be addressed now. There is no single solution. Consider sharing your results or partial results with other organizations that might be better equipped to address certain challenges identified that cannot be immediately addressed within your current scope of work.

Ask More Questions

Sometimes, we have a good idea how to take action, but some elements are unclear or we are aware that the action includes some assumptions. Further information can be collected to supplement data from surveys and focus groups. This can be formalized, such as follow-up surveys, or it can be informal. Reaching out to stakeholders, other organizations, or simply asking service users when they come to your organization, can solidify your understanding of whether or not your planned action will have value.

Keeping the Community Engaged

Once your project is complete and you have an action plan for moving forward, you can keep your needs assessment participants and community members informed about how their input is changing your services. Even sharing the smallest changes shows the community that you are taking action based on the feedback they provided. Consider advertising new services or sharing information about changes on your website or social media in ways that directly link the change to the needs assessment. You can post extensive reporting. However, it's often enough to say "In our needs assessment, we heard that our enrolment process has too many forms! We created a shorter enrolment process as a result. Thank you for your input!"

Appendix 1: Resources about needs assessment and data collection

This toolkit provides guidance for conducting assessments of community needs and resources:

- Community Assessment, The University of Kansas, retrieved from, link: https://ctb.ku.edu/en/table-of-contents/assessment

Developed in 2012, this toolkit includes templates, tools and resources for conducting needs assessments with Community Adult Learning Providers (CALPs):

- Community Learning Needs Assessment Toolkit, retrieved from, link: https://calp.ca/_uploads/resource-doc-372.pdf

Developed in 2012, this report includes practical tips, advice and best practices based on experiences of organizations in Alberta:

- Campus Alberta Needs Assessment System, Final Report, retrieved from, link: https://calp.ca/_uploads/resource-doc-371.pdf

This workbook provides tools and exercises that build capacity of organizations to conduct needs assessments:

- Community Needs Assessment Participant Workbook, Centers for Disease Control and Prevention, retrieved from, link: https://www.cdc.gov/globalhealth/healthprotection/fetp/training_modules/15/community-needs_pw_final_9252013.pdf

This resource supports planning of the community-led needs assessment:

- Assessing Community Needs and Resources, Canadian Mental Health Association, retrieved from, link: https://ontario.cmha.ca/wp-content/uploads/2017/03/cca_roadmap_assessing_community_needs.pdf

Gender Based Analysis+ is a federal training program, offered free online. The course and the resources included can help those conducting needs assessments to consider inclusive language, as well inclusive questions in research. It also provides information about the language used in reporting, which helps to prevent some forms of bias.

- Gender Based Analysis+ Canada Course, link: https://cfc-swc.gc.ca/gba-acs/course-cours-en.html

A resource about readability and the use of plain language. This style guide includes tips and examples how to write in a way that makes material accessible. It also includes instructions how to use a readability tool that helps determine the level of language used in materials. Note that

- Canada.ca Content Style Guide, Plain Language section, link: https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html#toc6

Appendix 2: Sources for conducting desk research

Resources with Town or Municipal Region Data

- Alberta Regional Dashboard, link: https://regionaldashboard.alberta.ca/#/
    - an interactive dashboard with data on the population, new permanent residents, new temporary residents, and total temporary residents of municipalities in Alberta

- Census Profile, 2016 Census, link: https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/index-eng.cfm
    - Census data can be searched by municipality. The breakdown by information provides information on population, household structures, languages spoken, family characteristics, income. It also includes information that can inform service planning such as place of work, mode of commuting, and time leaving for work. This data can provide insights into opportunities and barriers of residents to attend learning opportunities.
    - Statistics Canada provides support for finding the right data in their public tables. Don't be afraid to contact them for assistance!

- Check your municipal website for statistics. Many towns provide interactive visualizations of statistics drawn from local research or statistics Canada. For example:
    - Link, https://wainwright.ca/doing-business/statistics/#bia-tools
    - Link, https://townfolio.co/ab/hanna/labour-force

    TIP: a popular tool is townfolio. Try searching your town name + townfolio in google, or contact the municipality (data is public and if available will usually be provided)

    - Immigration Settlement Services and Gaps in Alberta, including language and literacy training and workplace training, link: https://www.brandonu.ca/rdi/files/2015/09/Alberta-Provincial-Report1.pdf

Resources with Provincial or Federal Information

- Open Government, link: https://open.canada.ca/en/open-data
    - Databases are organized by topic, including Education & Training and Language and Linguistics

- Monthly Labour Force Statistics, Alberta, link: https://open.alberta.ca/publications/2727158

- Statistics Canada reports: https://www150.statcan.gc.ca/n1/en/type/analysis?MM=1
    - Adult learning reports, specifically, link: https://www150.statcan.gc.ca/n1/en/type/analysis?subject_levels=37%2C3701#articlesandreports

- Alberta Integration Summit Report, link: http://legacy.aaisa.ca/wp-content/uploads/2014/09/Alberta-Provincial-Summit-English-Report-SrtV5-FINALRG.compressed.pdf

- Alberta Settlement Outcomes Survey results, link: https://open.alberta.ca/publications/alberta-settlement-outcomes-survey

- Alberta Immigrant Nominee Program, Alberta Opportunity Stream, link: https://www.alberta.ca/ainp-selection-criteria.aspx

Federal Information Related to Immigrants and Immigration

- Immigration and Citizenship Canada, most recent immigration programs, and pilot programs, link: https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada.html

- Immigrant Labour Market Trends in Canada 2006-2017, link: Https://www150.statcan.gc.ca/n1/pub/71-606-x/71-606-x2018001-eng.htm

- Labour force characteristics by immigrant status in Alberta, link: https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410008301&pickMembers%5B0%5D=1.14&pickMembers%5B1%5D=3.1&pickMembers%5B2%5D=4.1

- Education, Labour, Demographics, and Public Opinion information for Canadian immigrants (first two data sets per email address are free access; subscription is required for additional viewing), link: https://www.statista.com/topics/2917/immigration-in-canada/

- Details of the Rural and Northern Immigration Pilot Program, link: https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/rural-northern-immigration-pilot/about.html

- Details of the Agri-Food Immigration Pilot Program, link: https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/agri-food-immigration-pilot.html

Appendix 3: Sample survey recruitment e-mail

Subject: Adult Learning Needs Assessment Survey opens on May 12th, 2020

Our organization is conducting a needs assessment about adult community learning and language training needs. We would like to hear from both residents and employers, to learn more about your needs and experience in accessing community adult learning and language training.

Responses from this survey will inform our planning and delivery of learning opportunities in our community.

We want to hear from all residents and employers in the area. To help us collect a wide range of responses and reach potential participants, **please distribute this survey widely** within your community.

This survey will stay open until June 5th, 2020. This survey takes 10-15 minutes to complete.

Link to the survey: [Link]

If you have any questions about the survey, you can contact [insert e-mail here]

Thank you,

[Signature of the organization sending the e-mail]

Appendix 4: Instrument – Survey, Community members

Note: When building this survey, note that the check mark box means that the question is multiple choice question where participants can select more than one responses (100% results may exceed 100%); a circle radio button means that the question is a single choice question (results should total to 100%).

Please specify the location where you are based. [Text input]

Note: We will not report your location, we are collecting this data to learn about the reach of our survey.

PROGRAMMING AND TRAINING NEEDS

What types of credentials do the majority of your employees, in each of the categories identified below, require to obtain employment with your company?

- ☐ No credentials
- ☐ High school diploma/GED
- ☐ Trades ticket
- ☐ Certificate (usually 1 year or less of study)
- ☐ Diploma (usually 2 years of study)
- ☐ Undergraduate degree (usually 3-4 years of study)
- ☐ Post-graduate certificate
- ☐ Master's degree or Doctorate
- ☐ Other – Please specify: [text input]

To what extent is your business or organization affected by a shortage of skilled workers? Please choose the option that most often reflects the impact

- ○ No effect. We are able to train potential workers ourselves for the skills they need to work here.
- ○ No effect. We have no trouble finding the skilled workers that we need.
- ○ Minimal. We have occasionally had trouble finding skilled workers.
- ○ Moderate. We have had some trouble finding skilled workers.
- ○ Severe. We continually have trouble finding skilled workers.

In the next five years do you anticipate needing to replace a significant number of workers, in your current location?

- ○ No, not at all
- ○ Yes, less than 10% of our current workforce
- ○ Yes, 10% to 25%
- ○ Yes, 26% to 50%
- ○ Yes, 51% to 75%
- ○ Yes, 76% to 100%

- I don't know
- Other, please specify: [text input]
- In the next five years do you anticipate needing to hire new workers, in your current location, due to growth of your business or organization?

We expect growth that will require an increase in the current workforce of:

- No increase
- Less than 10%
- 10% to 25%
- 26% to 50%
- 51% to 75%
- 76% to 100%
- More than 100%
- Other, please specify: [text input]
- I don't know

Please list the job titles of all the positions that you anticipate needing to fill in the next five years.

[text input]

TRAINING

What types of training or courses do your employees require to advance in their current jobs? (check all that apply)

Options: High need, Moderate need, Low need, No need, Don't know

- English Language Training
- Literacy
- Numeracy
- Foundational life skills
- Customer service skills
- Communication and teamwork skills
- Safety training
- Small business management (entrepreneurial skills)
- Intercultural and diversity training
- Leadership and management skills
- Accounting and financial skills
- Sales skills
- Research skills
- Computer and technology skills
- Other – please specify: [text input]

Does your company or organization have a relationship with an external provider to supply training or education to your employees? Please select all that apply.

- No
- Yes
  - a partner provides job specific training at our work site.
  - a partner provides job specific training at their site.
  - a partner provides an online, job specific training course or program.
  - our employees can seek employer supported credentials from our selected partner.
- Other – please specify: [text input]

In the past five years, where have you accessed training for your employees? Please check all that apply.

- A post-secondary institution
- A private education provider (fee for service)
- Community organization, regular trainings
- Community organization, customized training
- Other – please specify: [text input]

How interested would you be in each of the following options for employee training and learning?

Options: High Interest, Moderate Interest, Minimal Interest, No Interest, Don't Know

- Online/Internet-based learning
- Classroom instruction in my local community
- On-campus classroom instruction at a post-secondary institution
- Other, please specify: [text input]

How important is it to you as a manager that more educational and training programs are delivered in your own community?

- High importance
- Moderate importance
- Low importance
- No importance
- Don't know

EMPLOYER ROLE IN ADULT LEARNING AND SKILLS TRAINING

Does your business or organization provide support for employee access to training or ongoing professional development required to earn a credential such as a certificate, degree or professional license or to maintain their current credentials?

Choose the phrases that describe the practices at your business or organization. Please check all that apply.

- No support at this time.
- We offer incentives (such as a raise in pay) if employees earn additional credentials, although they have to learn on their own time and at their own expense.
- We provide access to professional development modules (either paper based or online) that employees can complete during work hours.
- We provide access to professional development modules (either paper based or online) that employees can complete on their own time.
- We offer informal support such as flexible work hours to pursue external learning opportunities.
- We offer financial support to pursue external learning opportunities.
- We offer flexible work hours to pursue external learning opportunities.
- Other – please specify: [text input]

Does your business or organization provide support for employees to access skills training that will improve their ability to perform their job duties (e.g., improved language skills, computer classes, etc.)?

Choose the phrases that best describe the practices at your business or organization. Please check all that apply.

- No support at this time
- We provide in-house training, when required.
- We expect employees to complete individual study modules (either paper based or online) during work hours.
- We expect employees to complete individual study modules (either paper based or online) on their own time.
- We offer informal support such as flexible work hours to pursue external training.
- We offer financial support to seek external training.
- We offer flexible work hours to pursue external learning opportunities.
- Other – please specify:

What types of skills training does your business or organization provide to employees?

Options: Current practice, Considering this practice, Not under consideration

- Informal on the job training for all employees (a current employee shows the new employee the ropes)
- Formal in-house orientation/ training programs for new or recently promoted employees, during work hours (classroom experience or training modules)
- Ongoing in-house formal training programs for all employees, during work hours (classroom experience or training modules)
- External providers are brought in to provide training programs related to our business during work hours
- Tuition support for employees to take external courses or programs
- Paid time for employees to take external training during work hours
- Unpaid time (time off) for employees to take external training during work hours

ABOUT YOUR BUSINESS

Including yourself, how many individuals does your business or organization employ at your current location?

- 10 or less
- 11 – 25
- 26 – 50
- 51 – 100
- 101 – 500
- More than 500

Does your business or organization operate in more than one location?

- Just this location
- Local company with more than one location
- Provincial company with more than one location
- National company with more than one location
- International company with more than one location
- Other – please specify: [text input]

Including yourself, how many individuals does your business or organization employ (all locations)? [Don't show if the answer to question 16 is Just this location]

- 10 or less
- 11 – 25
- 26 – 50
- 51 – 100
- 101 – 500
- More than 500

[Hide if there is only one location] **Who makes the decisions with respect to employee training needs, supports, or programs?**

- We make the all the decisions at this location.
- We make the decisions for this location at this location
- The decisions are made at a regional office outside this community.
- The decisions are made at a provincial or national office.
- Other – please specify: [text input]

Which of the following sectors best describes your business or organization?

- Agriculture
- Forestry, fishing, mining, quarrying, oil and gas
- Utilities
- Construction
- Manufacturing
- Wholesale and retail trade
- Transportation and warehousing
- Finance, insurance, real estate and leasing
- Professional, scientific and technical services
- Business, building and other support services
- Educational Services
- Health care and social assistance
- Information, culture and recreation
- Accommodation and food services
- Other services, please specify: [text input]

Appendix 5: Instrument – Survey, Employers

(Note: When building this survey, note that the check mark box means that the question is Multiple Choice question; Circle means that the question is a Single Choice question)

Where do you live? [text input]

Note: We will not report your location, we are collecting this information to learn about the reach of our survey.

Are you interested in attending learning opportunities (classes, language training) in your community?

- ○ Yes, I am already attending
- ○ Yes, I am planning to attend
- ○ I need more information about what is available in my community
- ○ Other, please specify [text input]

What is the main reason you are interested in learning opportunities?

- ☐ Personal interest
- ☐ Personal improvement/development
- ☐ Current job or employment
- ☐ Future job or employment
- ☐ Starting a business
- ☐ Meeting requirements for my current job (e.g., safety training, first aid)
- ☐ Meeting requirements for future job (e.g., safety training, first aid)
- ☐ Other, please specify [text input]

What type of learning opportunities are you interested in? Check all that apply

- ☐ Reading and writing (literacy)
- ☐ Math and numbers (numeracy)
- ☐ Life skills
- ☐ English as a second language
- ☐ High school upgrading/GED
- ☐ Technology and digital skills (e.g., courses in computer use)
- ☐ Certificate, diploma, degree, trade
- ☐ I don’t know
- ☐ Other, please specify [text input]

What types of training or courses do you require to grow or move up in your job or career? Check all that apply.

Options: High need, Moderate need, Low need, No need, Don’t know

- English Language Training
- Reading and writing (literacy)
- Math and numbers (numeracy)
- Life skills
- Customer service skills
- Communication and teamwork skills
- Safety training
- Small business management (entrepreneurial skills)
- Intercultural and diversity training
- Leadership and management skills
- Accounting and financial skills
- Sales skills
- Research skills
- Computer and technology skills
- Other – please specify [text input]

How would you rate your knowledge about the learning opportunities in your community?

- Very high
- High
- Average
- Low
- Very low

Who do you go to when you want to find learning opportunities? Please list all that you can think of

[text input]

How do you receive and/or find information about learning opportunities in the community? Check all that apply.

- Social media (Facebook, Twitter)
- Websites
- Family and Friends
- Newspapers
- Local organizations
- Posters and brochures
- Other, please list here [text input]

Sometimes some people face challenges when accessing learning opportunities. Do you experience any of these challenges? Please check all that apply to you

- Cost (financial barriers)
- Scheduling issues
- Language skills
- Lack of prerequisites
- Lack of computer or internet at home
- Transportation and travel
- Lack of support for persons with disabilities
- Lack of support for cultural diversity
- Child care
- Work responsibilities
- No employer support
- No government support
- Limited programming in my community
- Other, please specify: [text input]

How important is it that more educational and training programs are offered in your own community?

- Very important
- Important
- Somewhat important
- Not important
- Don’t know

Do you own or have access to the following at home?

Matrix, options are Yes, No, Planning to buy

- Desktop computer
- Laptop computer
- Tablet or iPad
- Smartphone

Do you have Internet at home? Check all that apply

- High speed connection at home
- Internet through your cell/smart phone
- Satellite internet
- Dial-up internet
- None

Do you know where you can use public computers and internet in your community?

- ☐ Yes
- ☐ No
- ☐ Not sure

ABOUT YOU

What is your highest level of completed elementary or secondary education?

- ○ High school diploma or equivalent (GED)
- ○ Grade 12-13, but no diploma
- ○ Grade 10-11 or equivalent
- ○ Grade 7-9 or equivalent
- ○ Grade 6 or less
- ○ No formal education
- ○ Prefer not to respond

What other education have you obtained? Check all that apply.

- ☐ None
- ☐ English language training
- ☐ Academic upgrading
- ☐ Trades ticket
- ☐ Post-secondary certificate
- ☐ Post-secondary diploma
- ☐ Undergraduate degree
- ☐ Master's, doctorate, or professional degree
- ☐ Other – Please specify:

What is your gender?

- ○ Woman
- ○ Man
- ○ Other, please specify _________
- ○ Prefer not to answer

What is your immigration status in Canada?

- ○ Citizen of Canada
- ○ Permanent resident
- ○ Work permit holder
- ○ International Student
- ○ Refugee
- ○ Other, please specify [text]

How many dependents do you support, include both adults and children?

- None
- 1-2
- 3-4
- 5 or more
- Prefer not to answer

What is your employment status?

- Employed full-time (30 or more hours per week)
- Employed part-time (less than 30 hours per week)
- Not employed
- Prefer not to answer
- Other, please specify ___________

[If employed, prefer not to answer or other] **If you are employed at this time, are you:**

- Self-employed
- Permanently employed
- Contract, temporarily, or seasonally employed
- Other, please specify:
- Prefer not to answer

[If employed, prefer not to answer or other] **If you are not employed, what is your main reason for not working?**

- Unable to find work
- Family responsibilities
- Going to school
- Medical leave
- Retired
- Other – please specify:
- Prefer not to answer

Appendix 6: Instrument – Focus Groups

Note: Consider questions below as a guide for the discussion. You can ask additional questions related to these topics during the focus group to support participants to give you more details or to think about different perspectives.

Questions for residents:

1. Are you aware of the key education providers in this community? What is your experience in accessing learning opportunities with ______?
    - What is working well?
    - What could be improved?
2. How do you find out about learning opportunities in the community?
    - How can opportunities can be advertised in the future? We would like to hear some specific examples and why you think that approach will work.
3. Do you have experience in accessing online courses? What are the advantages/disadvantages of this online delivery when compared to face to face delivery?
    - What about hybrid or blended delivery? (introduce using an example)
4. Do you think/find that residents of this community are experiencing barriers/difficulties accessing learning opportunities? What are those barriers? How can they be addressed?
    - Are program costs a barrier to accessing learning opportunities?
    - Is length of courses a barrier to increased learning?
    - Is schedule flexibility important in learning opportunities?
5. Think about your family, friends and neighbors. What are their experiences with accessing learning opportunities?
6. Is there anything else you would like to share about the learning opportunities in your community?

Questions for employers:

1. Are you aware of the key education providers in this community? Do you have experience working with them or accessing their programs?
2. Can you name some programming/classes in this community =?
3. How do you find out about learning opportunities in the community that might benefit your employees? What about those looking for work, what do you think might be useful for them?
4. What are some ways the opportunities can be advertised in the future?
5. Thinking about the next five years, what do you think are the key skills needed in your industry? Is there training available? What are the gaps? Who do you think can fill those gaps?
6. Different types of programing are offered in this community through the Community Adult Learning Program system. They include, for example, Literacy, Numeracy, English as a second language, High school upgrading/GED, Technology and digital skills (e.g., courses in computer use), and Foundational life skills. Do you think that your employees would benefit

from accessing these programs? How can employers facilitate/support employees to access the learning opportunities in this community?

7. When you think about mode of delivery (online vs face to face), what are the advantages/disadvantages of online delivery when compared to face to face delivery? What about hybrid model (blended learning)? Do you think this would be a good approach to deliver programs in this community? Why or why not?
8. Do you have any other ideas how learning opportunities can become more accessible and beneficial for residents in your area? What about for you as an employer?
9. Is there anything else you would like to share?