

**Darlene F. Russ-Eft and Catherine M. Sleezer.
(2020). *Case Studies in Needs Assessment*.
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Reviewed by Brenda Cherkas

The editors of this book, Darlene F. Russ-Eft and Catherine M. Sleezer, liken the process of conducting a needs assessment to learning to drive a vehicle. Both activities involve acquiring *what* knowledge and developing *how to* knowledge. While the *what* knowledge can be found in the editors' previous collaboration, *A Practical Guide to Needs Assessment* (Sleezer, Russ-Eft, & Gupta, 2014), the *how to* knowledge can be found in this collection of needs assessment case studies. By picking up this book, the reader is granted permission to peek over the shoulder of practitioners working in diverse environments to uncover the *how to* knowledge of conducting needs assessments.

This book generously shares practical approaches to needs assessment, providing both novice and seasoned evaluators with a leg-up on their evaluative thinking when determining how to approach their current situation. By taking advantage of the tricks of the trade found within the shared case studies, evaluators can sharpen their evaluative thinking and practice, which in turn will result in saved time and effort, improved credibility, and the production of more practical results for the client (p. ix).

Because the term *needs assessment* has been used by various professions, a wide range of understandings of the term has evolved. The book begins with background information on needs assessment and provides definitions to the terminology commonly employed. This background information sets out a common framework allowing the information flowing from these cases to be laid out in a consistent manner and, therefore, easier to understand and use. By first examining the multiple understandings of the concept of *need*, the authors arrive at defining needs assessment as "a diagnostic process that relies on data collection, collaboration, and negotiation to identify and understand gaps in learning, and performance and to determine future actions" (p. 4, citing Sleezer et al., 2014, p. 310). To provide further clarification in the case studies that follow, the authors outline the many terms used synonymously with needs assessment and explain the terms *stakeholders*, *needs assessor or analyst*, and *decision maker*. To further assist the reader in pursuit of *how to* knowledge, the editors also include an exhaustive list of their favourite needs assessment resources.

The editors approached their professional network of practitioners and scholar-practitioners to request cases suitable for inclusion in this text. The selected cases were organized into the following five sections based on the five approaches

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to needs assessment set out by [Sleezer et al. \(2014\)](#): knowledge and skills assessment, job and task analysis, competency assessment, strategic needs assessment, and complex needs assessment. Each case takes place in a unique environment in diverse geographic locations, ranging from small-town U.S.A. to multinational firms with multiple locations. The needs assessments are prepared for a variety of clientele, including a close-knit non-profit organization, a fourth-generation family business, institutions of higher education, and large federal government departments. The evaluators or needs assessors themselves comprise an eclectic mix. Some assessments were performed in-house by employees or volunteers of the organization, while other assessments were conducted by outside consultants or students and interns. Further, some assessments were conducted by an evaluation team, while others were conducted by sole practitioners. Bearing in mind who was responsible for each evaluation may assist the reader considering whether the current assessment could be handled by someone intimately aware of the context or whether it would be more appropriate to have an external party conduct the assessment.

This vast array and combination of players and variables provides a rich source of information when seeking precedent material to shape one's own evaluation. To assist searches for information relevant to readers' needs assessment, the editors have included a handy reference table outlining each case. At a quick glance, readers can determine where the assessment was conducted, who conducted the assessment, the focus of the needs assessment, how data was collected for the assessment, and how the data were analyzed. There is a myriad of permutations and combinations in which to gather information relevant to any needs assessment. Going a step further, the authors provide a second table listing cases with issues of particular interest and have grouped these cases under the following categories: data collection, data analysis, presentations of results, and overall process (p. 9). With this information easily extractable, the reader has the option to choose to consult the cases most relevant to their current evaluation or enjoy the collection of case studies as a whole.

Each case describes the following components: the background for the needs assessment; the organization's profile; what led to the needs assessment; the focus and the boundaries for the effort; how the needs assessment was conducted (including data collection and analysis reporting); the needs assessment results and how they were used; what influenced the needs assessment (e.g., politics, culture, language); the issues that had to be addressed for success; discussion questions for considering in-depth issues; and appropriate references as well as some background information on the authors. In addition, some cases provide appendix material (e.g. data collection and management instruments). Although this information allows efficient comparison between presented cases to elicit practical information relevant to the current assessment, as a novice evaluator I would have appreciated an additional bullet point addressing the particular reason why the case was included in the particular needs assessment category and, more precisely, how the case was a prime example of a certain distinguishing feature of needs assessment.

The book is an easy read and is written in plain language rather than employing professional jargon. This intentionally highlights the importance of the evaluator learning and using the language of the environment of the evaluation, which in turn contributes to increased clarity and transparency in communication with the decision makers and stakeholders. However, as a student of evaluation, I would prefer the *what* knowledge and the *how to* knowledge combined into one resource, similar to the approach of [Funnell and Rogers \(2011\)](#).

The authors synthesize all of the practical information into seven key lessons arising out of the selected case studies. By building on the experience of other practitioners, not only will the evaluator save considerable time and effort, but also, by taking advantage of the lessons learned from prior cases, the resulting product of the assessment will be enhanced. But a word of caution—even if readers rarely dabble in needs assessments, do not hastily discount this book. Although it is intended as a specific resource, the overarching take-aways from this book transcend needs assessment and are relevant for any evaluation. The importance of maintaining flexibility and patience during the evaluation process, how to diplomatically respond when encountering pushback from a client, or how to encourage hesitant stakeholders to participate in an evaluation, among many other strategies shared in this text, make it a welcome resource on any bookshelf.

REFERENCES

- [Funnell, S. C., & Rogers, P. J. \(2011\)](#). *Purposeful program theory*. San Francisco, CA: Jossey-Bass.
- [Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. \(2014\)](#). *A practical guide to needs assessment* (3rd ed.). San Francisco, CA: Wiley & ASTD.