OPEN Quick Guide: Identify

This quick guide is part of a suite of technical resources developed by OPEN on behalf of The Centre.

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OPEN Quick Guide: Identify

Identify and understand the issues or need: provides an overview of the Identify stage of the Outcomes Journey.
At the end of working through this Quick Guide you will understand how to use different forms of evidence to better identify and understand the needs, issue, or gap and its causes to inform decisions about the service response.

What is the Identify phase of the Outcomes Journey?

A key focus of the **Identify phase** of the outcomes journey is building thorough knowledge about a need, issue or situation to inform decisions about appropriate action, service or program response, or advocacy and policy changes needed. You might be developing a new program, reviewing an existing one, or selecting an appropriate evidence based or evidence informed program from elsewhere.

Part of the early planning process is therefore to build your understanding of the need and the cause of any gap between 'what is' and 'what should be' for a client group through gathering the best available evidence. Evidence includes research and evaluation, organisational data sources, perspectives of clients and practitioners.

Drawing on a full range of evidence to build your understanding of the issue has a range of benefits. These include:

- Increasing the depth of consideration given to causal factors and what will work, leading to a greater focus on prevention and early intervention work.[1]

- Building relationships among stakeholders and securing support for action.

- Empowering communities and individuals by enabling them to define their own priorities and to identify the outcomes that matter to them.[2] This will increase the likelihood of their buy-in when the program is developed or selected and implemented (in the case of evidence based programs).

- Ensuring that the service response or program you identify is relevant, practical, credible and appropriate, therefore more likely to meet client needs and have high quality and effectiveness.[3]

How

Undertaking a needs assessment has a number of key steps. The extent and thoroughness in going through these steps depends on the size, seriousness of the issue or problem, its complexity and implications, and cost.

Key steps in undertaking a needs assessment can include:
1. Scope the needs assessment and assessment criteria
2. Plan for data collection or review
3. Collect, analyse and present data
4. Process to prioritise need and focus on outcomes and possible service responses
5. Define 'what success will look like' – what is the outcome you are seeking for this group.

See **OPEN Tool - 'Identifying and Prioritising Community Needs – Getting started with Needs Assessment Checklist'** for more detail on each step of this process.(forthcoming)

Key considerations in thinking about what evidence to use?

It is important to draw on different types of evidence.

Key features to consider in building a strong understanding about an issue and effective responses include:
- **Being clear about the purpose and scope of your information gathering,** and how you will use your findings. It is easy to get lost in all the information available.
- **Identifying multiple types of information or data to** fully explore the issue and possible responses, including research evidence, practice expertise and client experience, using qualitative and quantitative data where available.
- **Giving particular attention to the perspectives of clients and those with lived experience**, including reporting back to those involved about what was heard and how their views have contributed to decisions made and why. See OPEN Quick Guide – Client Experience (Program Design and Development).
- **Prioritise possible ways to address the issue**, including selecting what is most important and timely to address. If you have not done so already:
  - review the evidence on what has worked elsewhere, within your organisation, other organisations or other contexts nationally and internationally to address this issue. This can help you understand best practice in relation to the issue and identify potential organisations to collaborate with who may have successfully tackled the issue.

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- o engage colleagues, decision makers, clients and other key stakeholders in informal or formal conversations. How do they understand and experience the issue, what has or would work to address it.
- **If needed, document the understanding of the issue you have developed and possible solutions**, making sure to support this with your evidence sources. It will make your case more powerful if you document your findings.

What types and sources of data can be used to inform this stage of the Outcomes Journey?

A wide variety of evidence is available to build your understanding:

- **Research and analysis of your organisation or service reporting information** can provide valuable data, analysis, research and insight into priorities.
- **Population level data on the local area profile of your LGA and its communities** can be obtained from your local council and from the Victorian Government. This data can help inform your understanding of the local area and its communities, including comparing the situation, strengths and issues with those of other like communities.
- **Online research databases or research or policy institutes** can provide insight into what is known about the issue and how others have responded
- **Government policy and research papers** can provide insights into the current policy agenda, and key government (state, national and international) contributors to these discussions.
- **Gathering the views, perspectives and experiences of clients, community or key stakeholders** can be obtained through informal reflective conversations with clients, stakeholders and colleagues, interviews, focus groups or surveys (See Tools below).

  Remember – 'The experiences that people have when they have contact with community services are the richest and most important source of information about the quality and safety of those services. The client voice brings attention to situations of real and potential harm. The client voice is essential in understanding ways that quality and safety could be improved and tells us what is already working well'.[4]

See **OPEN Resource List– Identify** to identify sources of evidence and data you can draw on to inform your needs assessment. (forthcoming)

See **OPEN Checklist – Identify** for more detail on each step of the needs assessment process. (forthcoming)

Further tools that can help

Undertake a needs assessment process	
Australian Institute of Family Studies (AIFS) practice resource https://aifs.gov.au/resources/practice-guides/needs-assessment	This resource provides a definition of 'needs assessment' and outlines how to undertake one. This resource is for practitioners and policy makers who want to learn more about the needs assessment process or how to conduct a needs assessment.
The Community Tool Box - Centre for Community Health and Development at the University of Kansas https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources https://ctb.ku.edu/en/troubleshooting-guide	This Community Toolbox is a service of the Centre for Community Health and Development at the University of Kansas and provides a range of tools to support community development. • Chapter 3 provides detailed guidance on assessing community needs and resources. • Chapter 17 provides detailed guidance about analysing community problems, issues and solutions • The Community Toolbox also provides a Troubleshooting Guide for common challenges

References

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