

# Checklist Assessment

## Use

This checklist concerns various aspects of assessment and may help you ...

- decide if your project is necessary and useful
- assess the evidence for both the objective need and the felt or expressed need
- think about the conditions required in the project environment
- define more precisely the key-persons and stakeholders in the setting as well as the target groups of the project
- define clearly the visions and goals as well as the strategies and measures

## Argumentation for the project

### Needs assessment

The necessity for a project can be argued with facts and/or on theoretical grounds. Epidemiological data regarding the frequency and distribution of a condition or a disease is one such example. If you want to use epidemiological data for your argumentation, it is best to consult a specialist as the interpretation of such data requires specific know-how and much experience.

Arguments based on theory might include what is known about the correlation of cause and effect, for example the influence of convictions on coping strategies.

Researched sources for the needs assessment	yes	to do <sup>1</sup>
Scientific papers and theoretical contributions in Public Health literature (journals, books, data bases, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Scientific papers and theoretical contributions in specialist literature for psychology and social sciences	<input type="checkbox"/>	<input type="checkbox"/>
Project reports and recommendations from other projects	<input type="checkbox"/>	<input type="checkbox"/>
Programme and project evaluations	<input type="checkbox"/>	<input type="checkbox"/>
Statistical data from general population surveys and other enquiries	<input type="checkbox"/>	<input type="checkbox"/>
Laws, administrative orders or guidelines (e.g. for drugs prevention)	<input type="checkbox"/>	<input type="checkbox"/>
Regional, national or international programmes and strategies	<input type="checkbox"/>	<input type="checkbox"/>
Sources from the internet (e.g. online journals, forums, data bases)	<input type="checkbox"/>	<input type="checkbox"/>

Other possible sources: .....

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<sup>1</sup>Think carefully where else you still want to research and cross on the relevant sources.

Conclusions/remarks: .....

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**Embedding of the project**

	yes	to do <sup>2</sup>
The project is part of a broader programme or is set within a public health policy.	<input type="checkbox"/>	<input type="checkbox"/>
In discussions with programme directors possible synergies with other projects have been explored.	<input type="checkbox"/>	<input type="checkbox"/>
It has been checked if other projects with similar objectives have been implemented (or are planned).	<input type="checkbox"/>	<input type="checkbox"/>

Conclusions/remarks: .....

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**Felt or expressed needs/benefit**

Unlike the assessment of an 'objective' need which is based on scientific data and facts and/or experiences from interventional practice, the necessity for an intervention taking into account the point of view of the settings' key-persons and target-groups is a so-called felt or expressed need. Do your project's aims correspond with the wishes of the people and groups in the setting? Do they know what promotes good health or what is detrimental?

People and groups who can see the benefit that they derive from a change are more likely to get involved in the planning and implementation. If there is no felt need for an intervention, adequate ways may be found to still sensitize the target group to a particular problem. But if a disadvantage from an intervention is feared, opposition will naturally result. This is of particular importance if an intervention is targeted at certain particular groups but others are indirectly affected.

Which key-persons and stakeholders can benefit from the project? And which ones cannot?	yes	no	to clarify <sup>3</sup>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<sup>2</sup>Think carefully what action you want to take.  
<sup>3</sup>Make a list of the representatives of the stakeholders and target groups that you need to contact in order to clarify the need and possible benefit.

Which key-persons and stakeholders can benefit from the project? And which ones cannot?	yes	no	to clarify <sup>3</sup>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Which stakeholders might put up opposition and why? .....

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Conclusions/remarks: .....

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**Overview of normative (objective) needs and felt or expressed (subjective) needs (2x2 table)**

Mark the box (A-D) which most corresponds to your project

		There is a felt and/or expressed need	
		yes	no
There is a normative need	yes	<input type="checkbox"/> <i>A</i>	<input type="checkbox"/> <i>B</i>
	no	<input type="checkbox"/> <i>C</i>	<input type="checkbox"/> <i>D</i>

Explanations of the four boxes

**A:** The prerequisites for the project are good!

*Example: There is a general climate of violence in a school. Students, teachers and parents are suffering and would like to act. They approach the responsible authority with their problem. The collaboration with these groups will be positive and productive as the problem is keenly felt by themselves. The project can aim straight at the problem (violence) and concentrate on the groups that are concerned by it.*

**B:** If the stakeholders in the settings and the targeted groups in particular have no felt need for an intervention, the implementation of a project is much more difficult and its success is by no means guaranteed. In such a case it may be necessary first of all to make all those involved aware of the health theme in question. There may be a possibility to connect a normative need to one that is actually felt or expressed by the target group. You can try to discuss it with some key-persons and representatives of the stakeholders or you may want to involve a cultural mediator. Newspapers and other reports about the setting might well give you ideas on how to approach the problem and what arguments might work in order to convince the stakeholders.

*Example: According to official statistics, in Switzerland as elsewhere many road accidents are caused by drunk drivers – there is an objective normative need for interventions in order to reduce suffering and costs. The main cause are young male drivers who are not aware of any problem until they are involved in an accident – this target group does not feel or express a need for preventive action. The first step in an intervention must therefore be the identification of potential drunk drivers. In a next step means and ways must be found to sensitize this target group to the problem. This is best done if the theme of drinking and driving can be linked to a felt need of the target group (e.g. with the creation or extension of recreational facilities).*

**C:** See under needs assessment! If no facts or data are available you can try to convince experts in the field to make statements regarding the necessity for an intervention.

*Example: Girls who are regular users of a youth centre express the need to spend one evening a week without boys and would like to have a 'boys-free' zone and perhaps some activities specifically for girls. Experience shows that in mixed groups it is the boys who decide on the activities, the music, the themes and that girls have too little opportunity to be aware of their own wishes, let alone to put them into action. In such a case it is up to the manager of the youth centre to make the correlation between an expressed need and the well being of girls in terms of health in order to substantiate a demand for a girls-specific offer.*

**D:** The prerequisites for the financing and the successful planning and implementation of a project are extremely unfavourable! You must consider carefully if your time and energy is not better spent on another issue.

Conclusions/remarks: .....

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### Social and cultural aspects

All target groups do not need the same degree of support in order to recognize and develop their own individual and social resources. When assessing the nominal and felt need for preventive and health promoting interventions a number of individual and cultural characteristics must be taken into account

For the project the following aspects must be taken into account:	yes	no
Age/Potential for development	<input type="checkbox"/>	<input type="checkbox"/>
Physical and mental health	<input type="checkbox"/>	<input type="checkbox"/>
Gender (sex)	<input type="checkbox"/>	<input type="checkbox"/>
Sexual orientation	<input type="checkbox"/>	<input type="checkbox"/>
Educational level	<input type="checkbox"/>	<input type="checkbox"/>
Social status	<input type="checkbox"/>	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>
Religious belief	<input type="checkbox"/>	<input type="checkbox"/>
(Sub-) cultural values and ways of life	<input type="checkbox"/>	<input type="checkbox"/>
Political convictions	<input type="checkbox"/>	<input type="checkbox"/>
Mother tongue/foreign language	<input type="checkbox"/>	<input type="checkbox"/>

Other important aspects: .....

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Conclusions/remarks: .....

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**Social and political framework**

Special aspects to be considered: .....

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**Legal framework**

Get information about national, regional or local laws that might have an impact on your project. On all levels, try to find out if such laws are undergoing a revision process.

The following laws and regulations are relevant (or not relevant) for the project ...	yes	no	changes to be expected <sup>4</sup>
Epidemics act(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Criminal code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Code of obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drugs legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health insurance act	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data protection act	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Relevant laws and regulations: .....

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Conclusions/remarks: .....

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<sup>4</sup>Is there a chance that new regulations that could influence the course of the project will be introduced during its duration?