Needs assessment planning worksheet

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For orientation and preceptor development planning. Complete on paper, or use the prompts in your approved planning document. This is an original planning aid, not a validated assessment, competency sign-off, or employee rating. Exclude patient and employee identifiers. Use roles rather than names.

1. Define the need and gather evidence

Date: _____ Unit / setting: _____

Focus: ☐ New nurse orientation ☐ Preceptor development ☐ Unit / program

Decision and scope

What decision must this inform? Which role, shift, setting, and time period are included?

Expected performance

What should people be able to do, in which situation? Name the approved policy, criterion, or standard.

Current evidence

Record source, date, context, and sample size. What happened? Separate observation from perception.

Strengths, gaps, and missing information

What is working? What differs from expectations? What has not yet been observed or needs verification?

Explore causes and set a priority

2. Check the explanation before choosing training

Assessment topic / setting (no identifiers): _____

Whose perspective is represented?

Consider new nurses, preceptors, educators, supervisors, and relevant shifts. Who is missing?

Possible contributors to check

Tick possibilities to explore, not confirmed causes.

☐ Knowledge / reasoning ☐ Skill practice ☐ Teaching / feedback

☐ Unclear criteria ☐ Workload / time ☐ Equipment / access

☐ Limited learning opportunities ☐ Inconsistent supervision

Evidence for the cause

Can the expected action be demonstrated with appropriate support? What barriers remain? How will you check?

One priority and why it matters

Consider potential harm, recurrence, reach, and feasibility. State the evidence and uncertainty. This is not a scoring scale.

Response to consider

What learning activity, workplace change, or combination could address the cause? What needs further investigation?

Follow local processes promptly for immediate safety concerns. Do not wait for this worksheet or a scheduled review.

Action and review plan

3. Complete one plan for each selected priority

Priority: _____

Observable goal

What action should improve, in which context, and against which approved criterion?

Action, resources, and support

Specify rehearsal, coaching, practice opportunities, clearer criteria, workflow changes, coverage, or other support.

Owner by role

Who will arrange the action?

Dates

Action due: _____
Review date: _____

Evidence to review

What baseline will you compare with what follow-up evidence? Record method, context, support needed, and opportunity to perform.

Review findings and next decision

What changed? What limits remain? Continue, adapt, gather more evidence, or escalate through the appropriate process.

☐ Interpretations checked with relevant participants
☐ Identifiers removed and small-group privacy considered

Original nursing planning prompts informed by CDC (2025), *Assess training needs: Conducting needs analysis*, and CDC (2026), *Quality training standards*. Adapt to local requirements. Full sources and companion reading are in the guide.