Leadership Needs Assessment

Documenting a leadership needs assessment is complex. One approach is through developing a central aim, followed by the competencies needed to lead the organization, others, and self. By adding contextual factors, an actionable leadership development plan evolves.

**abstract**

Professional development educators are charged with the function of performing an ongoing learning needs assessment of target audiences to satisfy accreditation needs, develop programs, and show a return on educational investment. In the area of leadership, such an assessment can be complex. Leadership skills at the individual level must transcend to the organizational setting where leaders can impact everything from strategy development to operations. Determining programs that impact the actions of leaders requires deep analysis and careful program design, the foundation of which is a leadership needs assessment.

**USING ASSESSMENT TOOLS**

The literature supports that many firms provide leadership assessment tools and corresponding programs. There is a heavy emphasis in these programs solely on individual development. Various instruments and tools measure leadership preferences to act or to highlight individual strengths or areas to improve. Addressing the validity and reliability of these instruments or services is beyond the scope of this article; instead, the purpose of this article is to suggest an organizing framework for developing quality programs.

When Crosby and Shields (2010) reported one approach to an assessment, it was based on a widespread concern for the lack of sufficient future leaders in the discipline. Their assessment led to insights collapsed into leadership development that would:

- “Build” a successful leader, change culture, and manage difficult behaviors.
- Address issues tied to horizontal violence or lateral hostility.
- Increase skills in other nurses in communication and critical thinking.
- Recruit and retain nurses through rewards and recognition strategies.
- Plan for leadership succession.
- Practice in multisized organizations from urban to rural.

With an eye toward these assessment results, several factors stand out. Only one area focused on developing the leadership capacity of leaders. The other aspects reflected leadership attributions (most likely at the director or unit manager role) that would resolve issues in others linked to human resource recruitment and retention, human resource development, and conflict management, including resolving violence and hostility as part of culture change.

**TAKING A HOLISTIC APPROACH**

The Center for Creative Leadership (CCL) has a useful framework that could help professional development educators think through a holistic approach to leadership assessment (Leslie, Chandrasekar, & Barts, 2011). In this framework, three types of competencies are noted:

- Leading the organization.
- Leading others.
- Leading self.

Considering the work of Crosby and Shields (2010), the assessed needs documented a major focus on leading others, with limited emphasis on self-development. Missing was any focus on what it meant to be a leader within an organization or beyond the organizational setting. In my experience, individual identification of needs produces sparse results, culminating in one or two topics or recommended speakers, and is of limited usefulness.

**DEVELOPING A CENTRAL AIM**

Again, with reference to the CCL work (Leslie et al., 2011), a Leader-
ship Gap Indicator is an assessment that begins with a success profile, a vision of the types of competencies or characteristics that will drive the organization to success. One strategic planning firm (T. Fallon & L. Schulte, personal communication, October 13, 2014) calls this vision “the central aim,” a compelling statement of what the organization’s success would look like 3 years out. The value of the central aim is that in a single statement, unified expectations are articulated and remain steady in rapidly changing environments where a drift of focus may occur.

From this vantage point, the professional development educator can now converse with an assessment team and eventually state the competencies needed to meet the central aim:

- What competencies are present in current leaders?
- What competencies can be developed?
- What kinds of programs would inspire, encourage, and lead to optimal leadership performance?

IDENTIFYING LEADERSHIP CAPACITY

The difference between the central aim and existing leader competencies (those holding defined leadership roles) identifies leadership capacity. Leader capacity should be assessed equally in those who work in professional, nonmanagerial positions. It is this group that begins to form the foundation for leadership succession. If leadership capacity is underdeveloped or absent, the central aim will not materialize, creating a crisis of leadership when stakes are high.

For a completed needs assessment, the focus shifts from individuals to an examination of organizational conditions, those drivers and deterrents that will obfuscate or accelerate leadership functioning. It is these drivers and deterrents that will flavor the action orientation of leaders. They also inform the content of leadership programs, helping to address restraints and optimize strengths to lead change initiatives. Well-designed leadership programs reflect favorably on professional development educators who can demonstrate strategic and operational benefits of their work.

Finally, leadership is both contextual and relational. It is a concept that evolves over time and is never static. When the needs assessment is conducted, consider the:

- Environment (dynamic or static).
- Clinical demands (new and emerging technologies and the presence of clinical risk).
- Professional structures (who has power and influence, the presence or absence of professional resources, and the care delivery model in use, formally or informally).
- Consumer demands (awareness of individuals, families, and communities of interest).

This final dimension of the needs assessment will help determine ways of delivering context-rich content, using leadership simulation, point-of-care instruction, off-campus education, multimedia and computer-driven delivery, and other formal fellowships and certification courses.

The best way to lead on is through a leadership needs assessment that is vision-driven, individually assessed, collectively derived to determine where gaps exist, and contextually rich.

REFERENCES
