What You Need to Know About Conducting a Needs Assessment

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Do we need to do this?

Have you ever wondered why your office offers a specific product or service?
Agenda

- Background
- Process overview
- Results and outcomes
- Lessons learned
Background – University of Minnesota

University
• Students: ~48,000
  – Undergraduate: 32,000
  – Graduate: 16,000
  – Nations represented: 130
• Faculty/Staff: ~18,000
• Campuses: 5

U Card Office
• Division: Auxiliary Services
• Services:
  – U Card issuance
  – Declining balance account
  – Specialty cards/badges
  – Passport photos
  – Event tracking
  – Professional photos
Background – College in Schools

- High school students taking courses for college credit
- Program based out of high school facilities
- Utilize outdated U Card stock
- Mail cards to high schools
Process Overview

1. Define Challenge
2. Gather Stakeholder Data
3. Conduct Research
4. Analyze Results
5. Review Options
Define the Challenge

• Limited remaining cardstock
• Operational challenges
  – Inconsistent ordering
  – Unplanned groups
  – Manual card creation
• Unclear purpose
  – Why do they need these cards?
  – How are these cards funded?
Gather Stakeholder Data

• Met with CIS program leadership
• Learned that students use the cards for:
  – Accessing library materials
  – Accessing athletics events and student discounts
  – Developing a sense of community

Could we meet these needs in other ways?
Conduct Research

• Libraries
  – Approximately 50 (out of 1,500) CIS students utilized their card at a library.
  • This represents about 3% of the cards produced in a single school year.
  – Libraries stated that these 50 students could also use their ID number without a card to checkout materials.
Analyze Results

• Reviewed results together
  – Libraries – not essential
  – Athletics & discounts – not essential
  – Sense of community – not essential
• Could not justify expense on our budget
• Presented options for lower cost alternatives
Process Overview

1. Define Challenge
2. Gather Stakeholder Data
3. Conduct Research
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Outcomes

- As of August 1, 2018 the U Card Office no longer produces CIS cards
- Reduced the cost of maintaining CIS card stock
- Reduced labor needed to produce cards
- Eliminated frustration from operations staff of managing orders
Alternate Outcome

- Increased revenue by charging for non-essential card
- Better leveraged to require adherence to card acquisition policies
- Better understanding of why we produce these cards
- Improved relationship with program from working through this challenge together
Lessons Learned

• It’s really important to…
  – **Understand the context** or *the why* behind a process, service, or product offering
  – **Understand the needs and desires** of a customer or stakeholder to be able to determine the optimal solution
  – **Do research to validate information** provided by customer/stakeholder
  – **Share all information transparently** with stakeholders so they can draw conclusions themselves
Ah! I Get It!

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