



## School Health Services

### Needs Assessment and Planning Strategies Checklist

This checklist is a resource for partners interested in assessing and addressing school health service (SHS) needs in their community. It serves as a guide to help those leading the planning effort think through the steps that they may want to take during the needs assessment phase of planning school health service provisions in their community.

The needs assessment and initial planning stage is an engagement period in which a planning team is formed, partners are engaged, information is gathered, and then shared back with partners to support future planning stages. This stage can be different for each community, depending on local capacity, existing partnerships, and past planning efforts.

The school health services needs assessment and planning stage is followed by an implementation stage of planning. Resources for improving and expanding services internally or through external partnerships can be found at the end of this document. We also include information about OHA's funded programs: school-based health centers, School Nursing Pilot Program, School-Linked Mobile and Telehealth Pilot projects.

## Contents

Strategy: Establish a Planning Governance Structure.....	3
Strategy: Establish a School Health Services Planning Committee .....	4
Strategy: Assess the need for school health services in your community.....	5
<input type="checkbox"/> Gather existing data.....	5
<input type="checkbox"/> Examine existing data and identify information gaps. You will need to engage your community to gather necessary information on school health services. ....	5
<input type="checkbox"/> For information that you lack, determine the appropriate data collection method(s) to obtain information from youth, families, the school staff/nurses, and other community partners. ....	6
<input type="checkbox"/> Develop a strategy for engaging key partners to collect data. ....	6
Strategy: Analyze the findings from the needs assessment.....	8
Strategy: Engage and inform community about the needs assessment process and results .....	9
Strategy: Understand different approaches to improve or expand school health services to meet student health needs .....	11

## Strategy: Establish a Planning Governance Structure

Defining the planning governance is the first step in a successful needs assessment and planning effort. Planning is typically led by representatives from local school, public health, and/or medical entities, with the support of other local key partners. It is helpful to have a lead decision maker or agency coordinating all aspects of planning.

- Establish who (individual or group) will be leading the planning effort. Ensure that the group includes diverse representation from the school and surrounding community.
- Designate a point person for planning coordination.
  - If current staff do not have capacity to lead planning, hire dedicated staff to lead the planning effort (e.g., Community Engagement Coordinator, Consultant, etc.).
- Determine which processes require school and/or partnering agency approvals, what information might be needed for approvals, and the timelines are for each process.
- School board and district leadership are key partners in any school health services program. Identify main points of contact at the school board and district leadership level and determine how they should be involved in the planning process.

### Resources

- Sample Community Outreach Consultant job descriptions: Available by request.
- “Identifying Key Community Partners” document: Available by request.

## Strategy: Establish a School Health Services Planning Committee

The School Health Services (SHS) Planning Committee will serve as your advisory group for leadership throughout the needs assessment, planning process, and beyond. Members should bring a variety of community perspectives, such as education, health care, and service users (e.g., youth and families), to inform the direction of planning process. This group will form the foundation of the school health services planning effort and ensure that the broader community has a voice in determining the direction of the planning. Families and youth are key partners who can offer critical support in development and service delivery.

- Establish a SHS planning committee that meets regularly to guide the planning process.
- Reach out to local key players to invite them to participate in the SHS Planning Committee. This list at a minimum should include students, parents and families, school administration and school health staff, local public health authority, local medical providers, any CCO that serves youth within the school district, Regional Health Equity Coalition (if applicable). You may want to also engage religious and cultural groups who represent and serve specific communities.
- Set regular, reoccurring meeting times that will work best for busy partners.
- Designate subcommittees for engaging specific community groups, especially if they are not represented on your planning committee.
- Work with the SHS Planning Committee and key partners to develop a shared vision and collaborative goals for the needs assessment; ensure the vision and goals are grounded in health equity.

### Resources

- “Building a SHS Planning Committee” document: Available by request.
- “School Health Services Needs Assessment Overview” presentation: Available by request.
- Needs Assessment Workplan template. Available by request.
- “Identifying Key Community Partners” document: Available by request.

## Strategy: Assess the need for school health services in your community

A needs assessment of your community does not have to be a formal research project, but rather a process of collecting information that will help identify specific health areas and populations of need. The goal of this needs assessment will be to determine which school health services are needed by students. A needs assessment will help you better understand the priorities of the population that will be served.

### □ Gather existing data.

This can include population-level data and previous needs assessments that were collected for this community (if applicable). Refer to “Resources” below to find population-level data examples.

- Demographic information about the school community or community at large: e.g., age, race/ethnicity, language, poverty, medically underserved populations, and/or free and reduced lunch rates
- Health and education information: e.g., rates of high school dropout, infant mortality, teen pregnancy, immunizations, well-child visits, and/or chronic diseases. Schools and districts regularly collect information as part of quality improvement, funding applications, or grant implementation. Engage your school or district to find out more about data that they have collected recently.
- Access to care in the school, district, and community more broadly: e.g., service availability internally and externally (school nursing, mental health, primary care/health centers, dental, hospitals, etc.), availability of transportation, existence of cultural or logistical barriers to care, and/or insurance coverage

### □ Examine existing data and identify information gaps. You will need to engage your community to gather necessary information on school health services.

You will want to ensure that you have information covering:

- Student health issues

- Health-related barriers students face that impact their school attendance
  - Services currently available and not available in the school or community
  - Barriers that students and their families face accessing the existing health services
  - Preferences for service types, hours, and location
- For information that you lack, determine the appropriate data collection method(s) to obtain information from youth, families, the school staff/nurses, and other community partners.

Data may be collected in-person or remotely. Refer to “Resources” below to find data collection templates. Options include:

- Surveys/questionnaires; may be most appropriate for school staff and student audiences
  - Focus groups; may be most appropriate for family and community participants
  - Key informant interviews; may be appropriate for school, community agency, healthcare, and health system partners
  - Resource mapping; may be most appropriate to assess existing health services within the school district and surrounding community
  - Dot surveys; may be a useful tool during focus groups, health fairs, or planning committee meetings
- Develop a strategy for engaging key partners to collect data.
- Some strategies for engaging youth and their families are:
- Work with pre-existing school/youth groups with an adult ally from the school providing support – can include health classes, clubs, or Youth Advisory Councils (YACs)
  - Plan for data collection to occur at events where families are likely to attend like back-to-school nights and school board or PTA meetings
  - Engage school or district administration to find appropriate ways and times to talk to school staff, like during staff meetings or in-service days
  - Utilize school email listservs to deliver surveys to students, families, and school staff

- Set aside time during homeroom or other classes to gather information from students
- Provide incentives and childcare options for focus groups and interviews where parents and families are participants
- Consider language interpretation needs and offer engagement activities and materials in languages used by your community
- Engage culturally specific groups within your community, especially those heavily impacted by health issues or who have barriers to accessing health services
- Work with youth on a Youth Participatory Action Research (YPAR) project related to the SHS planning process (e.g., determining need, assessing school community preferences, etc.)

### Resources

- “School Health Services Needs Assessment Overview” presentation: Available by request.
- “Identifying Key Community Partners” document: Available by request.
- [CDC’s School Health Index](#) – Module 5 is focused on School Health Services and may include the most applicable questions
- List of Oregon population data examples, including links. Available by request
- Secondary data list examples. Available by request
- Data Dashboards/Data Placemats examples. Available by request
- Needs Assessment Workplan template. Available by request
- Data Collection Toolkit. Available by request, including:
  - Survey templates, including:
    - Students
    - School staff
    - Family
  - Focus group guides, including:
    - Students
    - Family
    - Community
  - Key informant interview guides, including:
    - Coordinated Care Organization
    - School district staff

- Regional Health Equity Coalition
  - School nurses
  - Local Public Health Authority
  - Federally Qualified Health Center
  - Community partner
  - Healthcare provider
- Key informant interview outreach email template
- “Data Collection and Review Tips” document
- Youth Listening Session Toolkit from [https://opa.hhs.gov/sites/default/files/2020-10/OPA Youth Toolkit Final 508.pdf](https://opa.hhs.gov/sites/default/files/2020-10/OPA_Youth_Toolkit_Final_508.pdf)
- Community Listening Forum Toolkit from <https://www.countyhealthrankings.org/resources/community-listening-forum-toolkit> This tool was designed for forums focused on recovery and addiction but can easily be used for any issue.
- Facilitating Community Listening Sessions from [https://www.pta.org/docs/default-source/files/cfe/2020/cfe-facilitating\\_listening\\_sessions.pdf](https://www.pta.org/docs/default-source/files/cfe/2020/cfe-facilitating_listening_sessions.pdf). This guide was created for PTAs but has good ideas for engaging both families and youth.
- CDC Community Health Improvement Navigator. Available at: <http://www.cdc.gov/chinav/tools/assess.html>
- “Youth Participatory Action Research Curriculum” adapted for Oregon by the Institute for Community Research. Available at: <http://public.health.oregon.gov/HealthyPeopleFamilies/Youth/Documents/CurriculumYPAR2014.pdf>

### Strategy: Analyze the findings from the needs assessment

Once the data is gathered, it will need to be analyzed to determine your school health services gap areas. For example, the data may indicate that there are adequate school health services, but they are not well coordinated or utilized or that there are not enough school health services. The amount of data that you were able to collect may be overwhelming. It will be helpful to have a systematic plan for how you are going to analyze the data while keeping equity- and youth-



centered intentions. Some steps that you may want to take to analyze the findings are:

- Store all of your data from different engagement activities in one place, such as Google Drive, to make analysis collaboration easier
- Strategically sort the data so that it is broken down by race/ethnicity, gender, age, preferred language. You should be able to see outcomes for groups of students and quickly call out inequities, if any exist
- Preempt implicit bias. We all bring our own history and perspective to this work, so we need to know ourselves and our implicit biases. We will also carry biases into data analysis. Some research-based approach to counteract those biases is to heighten our own self-awareness by taking [Harvard's Implicit Association Test](#) or reading about, discussing, or highlighting examples of, for example – a racial minority group that portray that group in a positive light
- Think about cross-cutting themes that you see across the different data sources
- Create data dashboards/placemats or infographics that highlight significant data findings and make the data easier to digest
- Share findings with your Planning Committee to gather feedback and plan next steps

### Resources

- Six Steps to Equitable Data Analysis from <https://www.edutopia.org/article/6-steps-equitable-data-analysis>
- Data placemat examples available by request.
- “Data Collection and Review Tips” document available by request.

### Strategy: Engage and inform community about the needs assessment process and results

Once the needs assessment data is collected and analyzed, it is important to share that information back with the community, including students, families, and school staff. This provides community an opportunity to let the planning committee know if the data they have collected resonates and matches their experience and to gather further feedback. There are many ways to ensure your

community is informed and has an opportunity to provide feedback about the SHS needs assessment and future planning effort.

- Seek out and incorporate communities' interpretation of the data. Create a plan for sharing needs assessment results. This will include key partners to engage, development of materials, and methods of sharing information and gathering feedback.
- Materials you may want to create include:
  - Messaging materials for your planning committee to use regarding why you are conducting a school health services needs assessment, what you hope to achieve, and timeline for your activities.
  - Needs assessment results and materials to gather community feedback on those results.
  - Data dashboards/placemats, infographics, or presentation slides that highlight significant data findings and make the data easier to digest.
- Have the Planning Committee reach out to key partner groups. Some ideas on sharing with families in community settings include back-to-school nights and school board or PTA meetings. Some ideas on sharing with school staff include engaging the school administration to find appropriate times to talk to school staff, like during staff meetings or in-service days.
- Work with youth to present findings from this project to key decision-makers and integrate recommendations into the SHS plans.

### Resources

- “School Health Services Needs Assessment Overview” presentation: Available by request.
- Youth Listening Session Toolkit from [https://opa.hhs.gov/sites/default/files/2020-10/OPA Youth Toolkit Final 508.pdf](https://opa.hhs.gov/sites/default/files/2020-10/OPA_Youth_Toolkit_Final_508.pdf)
- Community Listening Forum Toolkit from <https://www.countyhealthrankings.org/resources/community-listening-forum-toolkit> This tool was designed for forums focused on recovery and addiction but can easily be used for any issue.
- Facilitating Community Listening Sessions from <https://www.pta.org/docs/default-source/files/cfe/2020/cfe->

[facilitating listening sessions.pdf](#). This guide was created for PTAs but has good ideas for engaging both families and youth.

## Strategy: Understand different approaches to improve or expand school health services to meet student health needs

The needs assessment data should provide information on the adequacy of the existing services and the potential investment needed to meet student health gaps. Approaches to improve or expand school health services could include:

- focusing on improving the existing school health services,
- expanding internal school health services like school nursing staff, mental health providers, telehealth, etc.,
- implementing or expanding partnerships with external school health service options like partnering with organization(s) to provide necessary health services, or
- a hybrid of the above approaches.

The information from the needs assessment may indicate that there needs to be a small or large investment in school health services. Small investments could look like hiring or partnering with an organization to provide one or two healthcare providers or care coordinators. Large investments could look like supporting a School-Based Health Center or developing a mobile and/or telehealth program at the school. By the time the SHS Planning Committee is deciding on the right approach for school health services, everyone should understand the nuances of the available options, have analyzed the needs assessment data, and provided the community with opportunities to share thoughts and concerns.

It is important to note that the Oregon Health Authority, Public Health Division (OHA-PHD) supports a few school health services programs that provide funding to participants: the School-Based Health Center Program (SBHC), the School Nursing Pilot Program (SNPP), a School-Linked Mobile Clinic Pilot Program, and a School-Linked Telehealth Pilot Program. It may be important for committee members to understand these programs and their requirements if the committee determines that one of them would be a good fit for meeting their school health needs.

- Review the resources listed below to understand the framework and implementation of the different approaches.
  - Understand the different services, who makes the investment, and who will use the services provided with each approach.
- Connect with OHA-PHD to get information about OHA-funded school health service programs; you may be able to be connected to communities who are currently funded to learn about what has worked for them.
  - Determine if you are leaning towards one approach to improving your school health services over the others. It may be helpful to list out the reasons why and what has been done that leads to your preferences at this point (i.e., previous assessments, focus groups, other data).
- Ensure all Planning Committee members understand the SHS options that your team is considering to meet student health needs. This includes understanding the partners who will need to make deep investments in each school health service delivery approach.
- Use your needs assessment data and conversations with key partners to outline pros and cons for each option. You will want to include:
  - Equity impacts
  - Concerns raised by youth, families, and community members and how each has been considered
  - Student health needs supported through each option
  - Capacity for school district or educational service district investment
  - Capacity for external partner(s) investment, if known (health clinic, community-based organization, etc.)
  - For SBHC, mobile, and telehealth:
    1. Availability of a suitable location on school grounds
    2. Potential medical partners to provide services
- Once decision has been made, work with the SHS Planning Committee and key partners to secure approval through appropriate procedures, if necessary (e.g., school board vote or other method).

- Once needed approvals have been obtained, begin developing a strategy for sharing your decision for school health services with your community and key partners you engaged throughout the need assessment process.

## Resources

- Racial Equity Toolkit from [https://racialequityalliance.org/wp-content/uploads/2015/10/GARE-Racial\\_Equity\\_Toolkit.pdf](https://racialequityalliance.org/wp-content/uploads/2015/10/GARE-Racial_Equity_Toolkit.pdf)
- School nursing:
  - Framework for 21<sup>st</sup> Century School Nursing Practice from: <https://www.nasn.org/nasn-resources/framework>
  - CDC Healthy Schools – School Nurses Help Keep Students Healthy from: [https://www.cdc.gov/healthyschools/features/school\\_nurse.htm](https://www.cdc.gov/healthyschools/features/school_nurse.htm)
  - General School Nursing Resources from the Oregon Department of Education. Available at: <https://www.oregon.gov/ode/students-and-family/healthsafety/Pages/genschnurseresources.aspx>
  - Oregon School Nurses Association Resources from: <https://www.oregonschoolnurses.org/home>
  - “What are Oregon’s school nurses doing?” Infographic that covers school nurse responsibilities: <https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/Documents/2020%20School%20Nurse%20Infographic.pdf>
  - Scan and Plan Toolkit document from the Oregon School Nursing Pilot Program. Available by request.
- School mental health:
  - Strengthening Mental Health in Education Oregon Department of Education webpage. Available at: <https://www.oregon.gov/ode/students-and-family/equity/schoolsafety/pages/strengthening-mental-health-in-education.aspx>
- School-Based Health Centers:
  - Oregon SBHC Program Website; overview of the SBHC model: <https://www.oregon.gov/oha/ph/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/index.aspx>

- Resources for Planning New SBHCs from the Oregon School-Based Health Center Program, including the “SBHC Planning: implementation Checklist” document. Available at: <https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/planning-new.aspx>
- SBHC Standards for Certification. Available at: <https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/certification.aspx>
- SBHC 101 presentation by the Oregon School-Based Health Center Program. Available at: <https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/YOUTH/HEALTHSCHOOL/SCHOOLBASEDHEALTHCENTERS/Pages/training.aspx>.
- American Academy of Pediatrics Bright Futures. Available at: <https://brightfutures.aap.org/Pages/default.aspx>
- Telehealth services:
  - “Introduction to school-based telehealth” webpage by the Health Services Resource Administration (HRSA). Available at: <https://telehealth.hhs.gov/providers/best-practice-guides/school-based-telehealth#:~:text=School%2Dbased%20telehealth%20improves%20and,care%20provider%20for%20annual%20appointments>
  - “School-Based Telehealth Playbook” from the School Based Health Alliance. Available at: <https://tools.sbh4all.org/telehealth/sbthplaybook/>.
- Mobile services:
  - “Mobile Clinics” webpage by the Rural Health Information Hub. Available at: <https://www.ruralhealthinfo.org/toolkits/transportation/2/models-to-overcome-barriers/mobile-clinics>
  - “How Do Mobile Health Clinics Improve Access to Health Care?” webpage by Tulane University School of Public Health and Tropical Medicine. Available at: <https://publichealth.tulane.edu/blog/mobile-health-clinics/>

- “Looking for a Place to Start?” webpage by the Mobile Health Map. Available at:  
<https://www.mobilehealthmap.org/resources/start-a-mobile-health-clinic/>