Needs Assessment
J.A.Beale, S.F.K.Campbell

Overview:
- This tool is designed to determine which baseline needs are missing from your operation following a situational assessment to determine the scope and focus of a program redesign; it is not a comprehensive list of all needs
- An asterisk (*) denotes that an example is available on a shared raptor resources google drive viewable at the following link: www.shorturl.at/GOPT6
- After each section there is space to brainstorm action items to address or prioritize missing needs

ADMINISTRATION				Notes:
Mission & Leadership				
Vision Statement	□ Yes	□ No	□ N/A	
Mission Statement	□ Yes	□ No	□ N/A	
Values Statement	□ Yes	□ No	□ N/A	
Board member job descriptions	□ Yes	□ No	□ N/A	
Board member recruitment plan	□ Yes	□ No	□ N/A	
Inclusive strategic planning process	□ Yes	□ No	□ N/A	
Regular meeting schedules (staff, board, etc.)	□ Yes	□ No	□ N/A	
Clear chain of command	□ Yes	□ No	□ N/A	
360 Evaluation of leadership & feedback process	□ Yes	□ No	□ N/A	
Whistle-blower policy	□ Yes	□ No	□ N/A	
Master budget	□ Yes	□ No	□ N/A	
"Rainy Day" reserve funds	□ Yes	□ No	□ N/A	
Generally Accepted Accounting Procedures (GAAP)	□ Yes	□ No	□ N/A	
Loss-prevention policy	□ Yes	□ No	□ N/A	

Marketing				
Marketing plan & budget	□ Yes	□ No	□ N/A	
Up-to-date website	□ Yes	□ No	□ N/A	
Regular, well-advertised hours of operation	□ Yes	□ No	□ N/A	
Effective welcome and directional signs	□ Yes	□ No	□ N/A	
Clear, attractive logo and advertising aesthetic	□ Yes	□ No	□ N/A	
Social media outreach plan	□ Yes	□ No	□ N/A	
Regular community outreach events	□ Yes	□ No	□ N/A	
Finances & Record keeping				
Development plan & budget	□ Yes	□ No	□ N/A	
Gift acceptance policy	□ Yes	□ No	□ N/A	
Annual giving program	□ Yes	□ No	□ N/A	
Donor retention plan	□ Yes	□ No	□ N/A	
Ambassador sponsorship program*	□ Yes	□ No	□ N/A	
Membership program*	□ Yes	□ No	□ N/A	
Endowment strategy	□ Yes	□ No	□ N/A	
Up-to-date permits for all activities	□ Yes	□ No	□ N/A	
Permit reporting protocol*	□ Yes	□ No	□ N/A	

Action items:

STAFFING				Notes:
Recruitment plan	□ Yes	□ No	□ N/A	
Up-to-date job descriptions	□ Yes	□ No	□ N/A	
Staff training protocol	□ Yes	□ No	□ N/A	
Staff performance evaluation process	□ Yes	□ No	□ N/A	

Professional development plan & budget	□ Yes	□ No	□ N/A	
Benefits plan (eg. medical, retirement, vacation,etc.)	□ Yes	□ No	□ N/A	
Volunteer/Intern				
Recruitment materials*	□ Yes	□ No	□ N/A	
Job description and expectations*	□ Yes	□ No	□ N/A	
Training protocol*	□ Yes	□ No	□ N/A	
Volunteer performance evaluation process	□ Yes	□ No	□ N/A	
Dismissal policy	□ Yes	□ No	□ N/A	
Safety protocol and training plan	□ Yes	□ No	□ N/A	
Liability waiver*	□ Yes	□ No	□ N/A	
Retention strategy	□ Yes	□ No	□ N/A	
Social media policy*	□ Yes	□ No	□ N/A	
Photo waiver*	□ Yes	□ No	□ N/A	

Action items:

FACILITY			Notes:
Accessibility			
Service animal policy*	□ Yes	□ No	□ N/A	
Youth interaction policy*	□ Yes	□ No	□ N/A	
ADA accessible walkways/ramps	□ Yes	□ No	□ N/A	
Facility cleaning and maintenance protocols	□ Yes	□ No	□ N/A	
Public Restrooms	□ Yes	□ No	□ N/A	
Adequate parking	□ Yes	□ No	□ N/A	

Aesthetics				
Landscaping (for privacy, education, enrichment, etc.)	□ Yes	□ No	□ N/A	
Directional signs	□ Yes	□ No	□ N/A	
Seating	□ Yes	□ No	□ N/A	
Programming space	□ Yes	□ No	□ N/A	
Maintenance strategy	□ Yes	□ No	□ N/A	
Access to maintenance equipment (e.g. power tools)	□ Yes	□ No	□ N/A	
Donation opportunities (boxes, written materials)	□ Yes	□ No	□ N/A	

Action items:

AMBASSADOR HOUSING				Notes:
Environmental				
Species-appropriate size	□ Yes	□ No	□ N/A	
Adequate drainage	□ Yes	□ No	□ N/A	
Access to light	□ Yes	□ No	□ N/A	
Access to elements (e.g. skylight, weathering yard)	□ Yes	□ No	□ N/A	
Adequate ventilation	□ Yes	□ No	□ N/A	
Access to water for drinking/bathing	□ Yes	□ No	□ N/A	
Enrichment (e.g. landscaping, bird feeders, etc.)	□ Yes	□ No	□ N/A	
Access to heating/cooling	□ Yes	□ No	□ N/A	
Humidity controls	□ Yes	□ No	□ N/A	
Cleaning and maintenance protocols*	□ Yes	□ No	□ N/A	

Perching				
Species and ability appropriate design/quantity	□ Yes	□ No	□ N/A	
Varied textures	□ Yes	□ No	□ N/A	
Species appropriate furniture	□ Yes	□ No	□ N/A	
Perch assessment protocol*	□ Yes	□ No	□ N/A	
Shift spaces	□ Yes	□ No	□ N/A	
Safety				
Entryway	□ Yes	□ No	□ N/A	
Enclosure locks	□ Yes	□ No	□ N/A	
Daily rounds protocol*	□ Yes	□ No	□ N/A	
Regular inspection protocol*	□ Yes	□ No	□ N/A	
Accessible fire extinguishers	□ Yes	□ No	□ N/A	
Emergency evacuation plan*	□ Yes	□ No	□ N/A	
Emergency fly-off/escape protocol*	□ Yes	□ No	□ N/A	

Action items:

CARE & TRAINING				Notes:
Collections				
Collection policy*	□ Yes	□ No	□ N/A	
Collection assessment*	□ Yes	□ No	□ N/A	
Euthanasia policy*	□ Yes	□ No	□ N/A	
Diet				
Varied and species appropriate	□ Yes	□ No	□ N/A	
Supplementation	□ Yes	□ No	□ N/A	

Adequate storage	□ Yes	□ No	□ N/A
Adequate rotation (oldest food used first)	□ Yes	□ No	□ N/A
Ordering schedule*	□ Yes	□ No	□ N/A
Emergency supply	□ Yes	□ No	□ N/A
Training			
Equipment (e.g. gloves, scales, bit boxes/bags, etc.)	□ Yes	□ No	□ N/A
Evidence-based training model	□ Yes	□ No	□ N/A
Formal training plans	□ Yes	□ No	□ N/A
Behavioral/training notes	□ Yes	□ No	□ N/A
Weight monitoring protocol	□ Yes	□ No	□ N/A
Husbandry			
Cleaning supplies (e.g. hoses, buckets, rakes, etc.)	□ Yes	□ No	□ N/A
Disinfectant protocol	□ Yes	□ No	□ N/A
Emergency capture supplies (e.g. gloves, towels, etc.)	□ Yes	□ No	□ N/A
Crates/transport for all birds	□ Yes	□ No	□ N/A
Enclosure repair strategy			
Wellness			
Regular access to veterinarian	□ Yes	□ No	□ N/A
Exam protocol*	□ Yes	□ No	□ N/A
Wellness records	□ Yes	□ No	□ N/A
Coping tools (e.g. dremel, clippers, styptic, etc.)	□ Yes	□ No	□ N/A
Towels/linens	□ Yes	□ No	□ N/A
Necessary medical supplies*	□ Yes	□ No	□ N/A
Enrichment			
Assessment protocol*	□ Yes	□ No	□ N/A

Ethogram forms*	□ Yes	□ No	□ N/A	
Supply source (e.g. donations, Amazon wishlist, etc.)	□ Yes	□ No	□ N/A	

Action items:

EDUCATION				Notes:
Interpretation				
Evidence-based information	□ Yes	□ No	□ N/A	
Accessible language	□ Yes	□ No	□ N/A	
Easy to read	□ Yes	□ No	□ N/A	
ADA accessible (e.g. vision/hearing impaired options)	□ Yes	□ No	□ N/A	
Educational Tools				
Touch collection (biofacts)	□ Yes	□ No	□ N/A	
Voice amplification	□ Yes	□ No	□ N/A	
Written materials	□ Yes	□ No	□ N/A	
Interactives	□ Yes	□ No	□ N/A	
Programming				
Up-to-date and accurate script/talking points	□ Yes	□ No	□ N/A	
Engaging dialogue	□ Yes	□ No	□ N/A	
Choice-based behaviors	□ Yes	□ No	□ N/A	
Accessibility (e.g. schedule, advertising, etc.)	□ Yes	□ No	□ N/A	
Evaluation process	□ Yes	□ No	□ N/A	

Action items: