



Participant Needs

Economic Empowerment Baseline Needs Assessment



Purpose

This discussion guide is designed for program staff to facilitate a conversation with a participant to understand their short- and long-term economic priorities and goals, as well as any pressing needs that should be addressed to enable participants to meaningfully participate in economic empowerment programs. Providing participants with space to share their experiences and articulate their priorities will help you tailor programming and support their goals throughout their program involvement. This resource can be revisited with the client over time.

Who is this resource for?

This resource is designed for **program staff** to guide discussions with program participants. It may be useful in both crisis intervention and longer-term services.



Instructions

- These questions are not meant to serve as a script but rather to facilitate conversation. The questions can be changed or adapted based on the preferences and norms of your staff and participants.
- This exercise can alternatively be conducted in a written format if that is preferable to participants.
- Ensure that participants know that there are no right or wrong answers and that they can share as much or as little as they would like.

Start with an explanation of why you are asking these questions. When you think about your money and finances, what are the most important things you need or want to do in the next three months? Some examples include saving money, finding a place to live, finding a new or different job, going to school or learning something new, learning how to fix your credit, learning about budgeting, or starting a new business. Here are some examples.

Personal Goals	Career Goals
Saving money	Find a new or different job
Finding a place to live	Go to school
Learn how to fix your credit	Learn something new
Learn about budgeting	Starting a business

1. Write the participant's needs/goals below.

a.

b.

c.

d.

e.

2. For each of the needs/goals listed above:

a. On a scale of 1-5 (with 5 being most important), how important is it to pursue that goal?
Why did you pick that number?

b. On a scale of 1-5 (with 5 being very ready), how ready are you to pursue that goal?
Why did you pick that number?

Use the table below to document responses.

Need/Goal	On a scale of 1-5, how important is it to pursue that goal?	Why did you pick that number?	On a scale of 1-5, how ready are you to pursue that goal?	Why did you pick that number?



3. Do you have circumstances that might prevent you from pursuing these goals?

Some examples may include things like other commitments (e.g. children's activities, appointments, classes, etc.), household or caregiving responsibilities, access to stable housing, access to transportation, physical or mental health needs, or safety/legal needs? If yes, please describe.



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