



Hello, everyone. Today we'll talk about the importance of community assessments and how to conduct one.

By the end of our session, you'll understand the different kinds of assessments and how to use each one. You'll also get some tips on developing a project that addresses the needs identified in the assessment.

We'll also talk briefly about how to use information from your assessment to plan a project that could be eligible for global grant funding.

WHAT IS A COMMUNITY ASSESSMENT?

- It examines a community's strengths, challenges, needs, and assets.
- It identifies relevant opportunities for projects that can make an impact.



The assessment explores your community's strengths, challenges, needs, and assets.

It's an essential first step in developing an effective project. By using some time at the very beginning of the process to learn about the community, you can identify the most relevant opportunities for projects and maximize your ability to make a meaningful impact.

Any club or district that applies for a global grant to support a humanitarian project or a vocational training team needs to have conducted a community assessment and included the results in their application.

THE BENEFITS OF AN ASSESSMENT

- It helps you understand the community issues and dynamics.
- It guides your decisions about service priorities.
- You'll establish valuable relationships.
- The process encourages community members to participate.
- It builds trust, a community commitment to a project, and sustainability.



Completing the assessment will give you a better understanding of the issues and dynamics in your community. It will help you and the groups you'll be working with make important decisions about what community needs to address first.

Even if you're actively involved in your community, an assessment can reveal additional strengths or opportunities. For example, the people you talk to might give you new ideas about how to address a known issue.

Before you start an assessment, consider what specifics you want to learn. An effective assessment will reveal things you didn't know. The assessment process also helps you build valuable relationships and encourages community members to actively participate in making lasting improvements. It's a critical first step in creating trust, a community commitment to any project that is developed from it, and its sustainability.

TIPS TO REMEMBER

- Remain open-minded.
- Talk to people from a cross-section of relevant groups.
- Include people who are often overlooked.
- Consider yourself an outsider.
- Don't promise a project before a decision is final.
- Work with other groups.
- Consider using district grant funds to pay for the assessment.

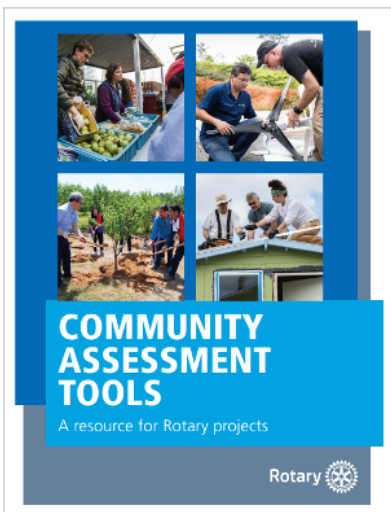


Remember these tips when you're conducting the assessment:

- Remain open-minded to what people say they need rather than presuming that you know the answers.
- Talk to people that reflect the community's diversity, including a cross-section of relevant groups by gender, age, ethnicity, religion, income level, and vocation.
- Take extra care to include traditionally underrepresented or marginalized groups, such as women, young people, the elderly, and religious or ethnic minorities. Consider the community's social dynamics and provide a forum where people will be comfortable sharing their opinions.
- Consider yourself an outsider, even if the community you want to work with is local. Find a well-connected person, group, or organization that can introduce you to key people in the groups you want to work with.
- Don't make promises about a project before your club or district has made a final decision — especially if the funding hasn't been secured. Do assure people that you'll let them know what the decision is and invite them to take part in any future activities.
- Remember that your club or district doesn't have to conduct the assessment on your own. You can work with a local service organization, university, or hospital that has experience conducting assessments.

- And consider using district grant funds to pay for a community assessment.

ASSESSMENT TYPES



- Community meeting
- Survey
- Interview
- Focus group
- Asset inventory
- Community mapping

Having casual conversations with just a few people isn't an effective way of finding out what a community truly needs. Assessments need to be systematic, involve a wide variety of community groups, and engage them in a meaningful way.

We'll talk about these six assessment methods. Understanding them will help you determine what type of assessment is best for a particular project, who will work on the assessment, and who can help you in this process.

You can use one, combine them, or adapt them to best suit your resources and the preferences of the people you want to engage with. All six are discussed in more depth in the Community Assessment Tools handbook, which you'll find in My Rotary.

COMMUNITY MEETING

- It's an informal public gathering.
- It brings people together to discuss issues or concerns and state their priorities.
- A facilitator leads the discussion and encourages participation.
- The facilitator also directs questions to experts.



A community meeting is sometimes called a town hall or public forum. It's an informal public gathering that brings people together to discuss issues, raise concerns, and express preferences about the community's priorities.

A facilitator leads the discussion about issues related to the community's strengths and challenges and encourages people to participate. The facilitator also directs questions to known experts.

It's a good idea to appoint someone who is respected in the community or a representative from a well-regarded community organization to serve as the facilitator, particularly if there are any cultural or language barriers between your club and the community.

COMMUNITY MEETING



TIPS

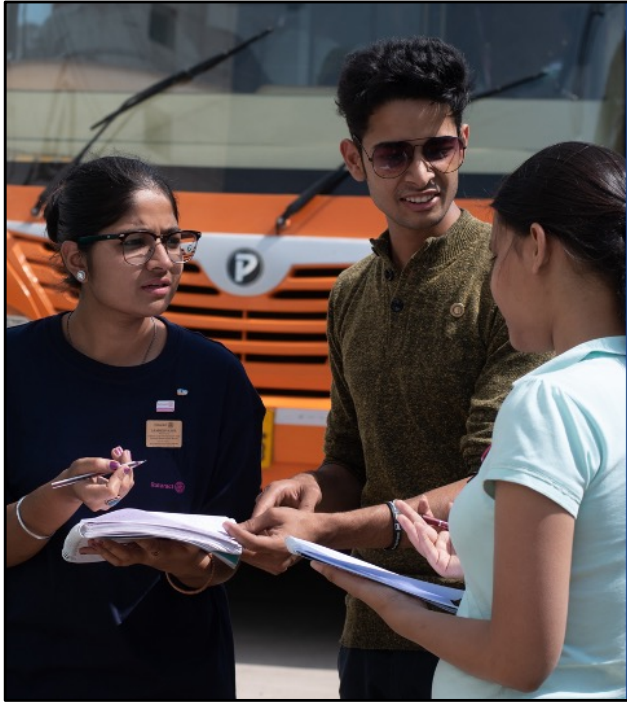
- Identify your goals.
- Select an accessible location and a convenient time.
- Promote the event in locally relevant ways.
- Prepare a list of concise questions.
- Set and follow a schedule and discussion rules.
- Take notes and make them public during the discussion.
- Be an active listener and ask people to elaborate if you don't understand.
- Allow for small-group discussions.

Some tips for conducting a community meeting:

- Identify your goals. What insight do you hope to gain from the meeting? Are there specific issues in the community that you want to understand better? Design questions that will provoke constructive answers.
- Select a location that's accessible and easy to find. Have it at a time that's convenient for participants.
- Promote the event throughout the community. Be mindful of cultural norms that may affect participation (for example, in some communities, women may not feel empowered to talk openly when men are present). Consider the literacy level of the community and how residents normally receive information (flyers, radio, announcements at schools).
- Prepare a list of straightforward and concise questions. If you hear new concerns being raised, ask follow-up questions to learn more.
- Set and follow a schedule. Decide how much time to use on each question and allow some time to factor in any new questions.
- Set rules for the meeting and share them beforehand so you can keep the conversation focused, engage more people in it, and prevent a few participants from dominating it.
- Take notes. Write the ideas publicly during the discussion. Enlist others to help

record the ideas so you can keep the conversation going.

- Be an active, engaged listener. Show all the participants that you're interested in what they have to say. Ask follow-up questions or ask people to elaborate if you don't understand their comments.
- Allow for small-group discussions, which can give more people a chance to talk. Assemble the groups in ways that increase the speaking opportunities for those people who may be less likely to speak otherwise (e.g., a group of all women, young people, people with disabilities, ethnic minorities, etc.). Ask each group to take notes on their discussion and have one member summarize it for the larger audience.



SURVEY

- It's an effective way to assess a community's perceived strengths, assets, challenges, and needs.
- It can be general or targeted.
- You can deliver it by email or phone or in person.

Now, let's talk about surveys.

These are a popular way to collect information and opinions. So a survey can be an effective way to gauge the community's perceptions of its strengths, assets, challenges, and needs.

Surveys can be general or targeted to specific segments of a community, and they can be delivered by email or phone or in person.

SURVEY



TIPS

- Explain why you're asking the questions.
- Keep the survey short and straightforward.
- Make sure the questions are unbiased.
- Conduct a small pilot of the survey first.

Some tips for conducting a survey:

- Explain why you're asking the questions. Participants are more likely to respond if they feel there will be a valuable outcome, like the possibility of a project to address a community need.
- Keep your questions brief and specific and the survey itself short and straightforward. If your survey is too long or complicated, people may rush their responses or even stop answering before completing it.
- Make sure your questions are unbiased. Avoid leading questions like "Would you like to have a new library in the vacant lot instead of a playground?" Use a more neutral form instead: "What would you like to have developed in the vacant lot? A) Library B) Playground C) Something else (give details)."
- Conduct a small pilot to test your survey. This can reveal whether your questions are clear and specific.

INTERVIEW

- It's a one-on-one conversation.
- It gives the facilitator more freedom.
- It allows more understanding of a person's feelings.
- The respondent is more likely to share personal opinions.



Let's talk next about interviews. These are one-on-one conversations between a facilitator (the interviewer) and a community member (the respondent).

Interviews differ from surveys because in an interview, the facilitator can veer off the script and ask follow-up questions. Because of this, interviews allow you to gain a deeper understanding of a person's ideas and feelings.

And because the community member is the facilitator's sole focus (unlike in community discussions or focus groups), the person is more likely to share personal opinions freely.

INTERVIEW



TIPS

- Identify your goals and decide who you want to interview.
- Prepare your questions and practice interviewing.
- Establish a rapport with your subject.
- Conduct the interview like a conversation.
- Take accurate notes.
- Be an active listener and ask respondents to elaborate if you don't understand.
- Be considerate of people's time.

Some tips for conducting an interview:

- Identify your goals. What insight do you hope to gain from the interview? Are there specific issues in the community that you want to understand better? Design questions that will provoke constructive answers.
- Decide who you need to interview. Whose opinions do you need to understand? Will you invite specific people for appointments, or will you ask anyone who passes by in a public place?
- Prepare straightforward and concise questions that use easily understandable wording. Ask more complex questions toward the end of the interview. If you will ask sensitive questions, be sure to conduct the interview in a private place.
- Practice your interview questions with your colleagues and solicit their feedback.
- Establish a rapport with the interview subject. Make them comfortable before you start asking questions.
- Conduct your interview like a conversation. It's best to have your questions memorized so you can ask them naturally and switch the order and add follow-up questions as needed.
- Take accurate notes. If you're recording your conversation, ask for the person's consent beforehand.
- Be an active, engaged listener. Show the other person that you're interested in what

they have to say. Ask for clarification if you don't understand and ask them to elaborate if they offer brief answers. You may want to prepare specific prompts to elicit additional information.

- Be considerate of people's time. After all, this may be the first conversation in a long and productive service partnership!



FOCUS GROUP

- It's a guided discussion.
- It includes six to 12 diverse participants.
- People are asked open-ended questions.
- It allows for in-depth conversation.

Now let's talk about focus groups, and how they're different from a community meeting.

A focus group is a carefully guided discussion you can use to determine the preferences and opinions of your smaller group about a particular issue or idea. Conducting a focus group requires thorough planning and a skilled discussion facilitator.

Most focus groups consist of six to 12 diverse participants, who are asked a series of specifically worded, open-ended questions about different issues in the community.

A focus group can help you determine how key groups believe community issues should be addressed.

You might consider organizing a focus group after an initial community meeting. Because of the smaller size of a focus group, you can have a more in-depth conversation with participants.

FOCUS GROUP



TIPS

- Select a convenient time and a comfortable location.
- Prepare questions ahead of time.
- Ensure that participants are representative of the community and interested in providing feedback.
- Explain the goals, introduce the main topic, and guide the discussion using prepared questions.
- Allow each person time to answer and respond to the comments of other participants.
- Record the session or take notes that are public.

Some tips for conducting a focus group:

- Select a time that's convenient for the participants and a location that's accessible, private, and comfortable for a small-group discussion.
- Prepare a list of questions ahead of time.
- Make sure the participants are representative of the community and interested in providing feedback.
- Explain your goals and the purpose of the focus group. Establish discussion rules to promote positive interactions and confidence in the process.
- Introduce the main topic and guide the discussion using your prepared questions. Establish a schedule beforehand, such as 10-15 minutes per question.
- Allow each person time to answer. Listen carefully to their ideas and ask for clarification if necessary but avoid confrontations or debates. Allow participants to respond to comments. Make sure the discussion and comments stay focused on the topic.
- Arrange for another facilitator to record the session or take notes of people's responses. Write the ideas publicly and ask the participants periodically if the notes accurately reflect their comments.

ASSET INVENTORY

- It identifies significant people, institutions, skills, services, environments, and events in the community.
- You can use this inventory to explore connections between the different items and how they can be involved.



Next, let's discuss an asset inventory. This is a way to identify the people, institutions, skills, services, environments, and events in a community that might be factors in or have an effect on any project you do there.

To conduct the inventory, identify the attributes or features that are useful or add value to the community, and then document and analyze those findings.

The resulting inventory identifies significant people, places, and things and lets you start exploring how they're connected to each other and how they can be involved in the process of creating positive change.

ASSET INVENTORY



TIPS

- Determine what you want to inventory.
- Invite small, diverse group to conduct the inventory.
- Use skilled group facilitators.
- Organize assets by category and document the connections between them. Analyze the results.
- Use the assets to create networks.
- Update and maintain the inventory regularly.

Some tips for conducting an asset inventory:

- Determine what you want to inventory and identify the potential participants.
- Invite a small, diverse group of community members to conduct the inventory in one or more sessions.
- Use skilled facilitators to ensure that all participants have an opportunity to contribute and that each discussion group stays focused and uses their time well.
- Organize assets by category and document the connections between them. Analyze the results.
- Use the available assets to create coalitions and networks to address community issues.
- Update and maintain the inventory regularly.



COMMUNITY MAPPING

- Individuals or groups draw maps of their community.
- They mark points that are important to them.
- The facilitator leads a discussion about the maps.
- This can reveal different perspectives about the community.

Last, let's discuss community mapping. This activity doesn't require a lot of time or materials, and it can be adapted for participants of virtually any age or educational background.

In community mapping, people from different groups draw a map of their community, marking certain points of importance and noting how often they visit these places. They can also suggest places that don't currently exist.

A facilitator then leads a discussion about the maps, while another facilitator records the discussion.

This activity can reveal different perspectives about the community and how important various things in the community are to different groups. It can also generate ideas about how to improve the community.

COMMUNITY MAPPING

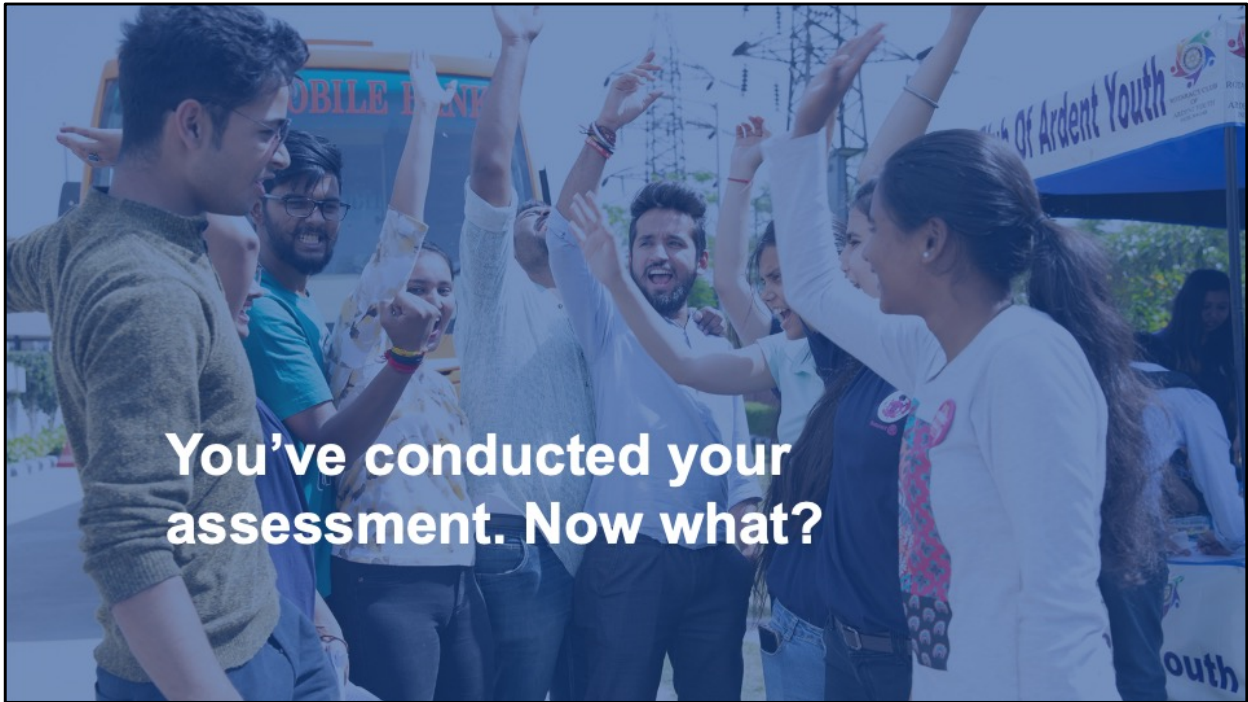


TIPS

- Keep the groups small.
- Help groups draw maps based on their own definitions and interpretations of the community.
- Discuss the maps together with the large group.
- Ask for volunteers to further analyze the maps and identify what should happen next.

Some tips for using community mapping:

- Keep the groups small — perhaps no more than 20 participants overall, divided into groups of four to six.
- Help each group draw a map based on their own definition of the community. The most valuable information from the maps will come from their variety and differences.
- In the large group, discuss all the maps. You might ask:
 - How are the maps different? Why might the differences be important?
 - How are the maps similar? What do the similarities suggest about important aspects of the community?
 - What places did people suggest be added to the community? How would these places improve the community?
 - Do the maps indicate any specific activities or projects that might improve the community?
- Ask the participants to join a committee to further analyze the maps and identify what should happen next.



Now that you understand more about each of these assessment methods, you may decide to use just one or combine a few in ways that are appropriate for your community. One method could even add to research already done by another entity.

The important thing is that you understand the tools you have available and how to use them to make decisions about what to do next.

SELECTING A PROJECT

If you can identify a possible project that addresses a core issue from the assessment, make sure that:

- The project is technically feasible
- Your club is qualified to address this need
- It doesn't duplicate existing efforts



After you've completed the community assessment and analyzed the results, you can determine which needs you are able to address.

It's important to remember that not every community assessment will lead to a project. Sometimes an assessment indicates that the need is beyond the capacity of the volunteers or can be addressed by other means.

But if you do identify a possible project that addresses a core issue from the assessment, make sure that:

- The project is technically feasible
- Your club is qualified to address this need through your collective expertise and the time, money, or other resources you have
- The issues aren't already being addressed by another organization and the government doesn't plan to address them in the near future

GLOBAL GRANT PROJECTS

If you're applying for a global grant, the project needs to:

- Comply with Rotary's global grant guidelines
- Be sustainable and measurable
- Align with the specific goals of an area of focus



A project can be funded in many ways, and a thorough community assessment will be useful if you're seeking partnerships or corporate funds.

If you want to apply for a Rotary Foundation global grant, you also need to ensure that the proposed project:

- Complies with Rotary's global grant guidelines
- Is sustainable and measurable
- Aligns with the specific goals of an area of focus. You can find the goals in the Areas of Focus Policy Statements, which provide detailed guidance about what types of projects are eligible and what information you should include in your application.

PLANNING A PROJECT

- Collaboration is essential!
- Sponsor clubs work together to develop the project plan.
- Always involve community members.



Collaboration is essential to developing any project. If you're planning to apply for a global grant, it's especially important.

In a global grant-funded project, two or more clubs or districts work together. The host sponsor is in or near the community where the project is happening. The international sponsor is outside that country and works with the host sponsor to develop and implement the project.

Whether you apply for a global grant or not, it's also critically important to involve community members in the planning process. They should be involved in creating the project plan or be able to review it and provide feedback.

The most successful plans allow Rotary members and community members to take action together. That collaboration — and the active involvement of Rotary members — should be evident to anyone who reviews your project plan.

PLANNING A PROJECT



Your plan should include:

- The community impact
- Measurable goals and outcomes
- Action steps for each part of project
- Assignments of responsibilities
- How you'll monitor and collect data
- Possible alternative approaches

Regardless of how you plan to fund your project, a successful plan should include:

- The impact you want to have on the community, which can include immediate, intermediate, or long-term results
- Measurable goals and outcomes, which correlate directly to the data you collected in your assessment and the goals you set in response
- A description of what action is needed to implement each step of the project (your project design)
- A list of responsibilities and who they're assigned to so that all work is accounted for
- How you'll monitor the project and collect data that will show whether you need to change focus or demonstrate your impact
- Possible alternative approaches that will let you adjust quickly if your planned activities don't yield the desired results

Having all of these items will make your project more effective and make the best use of your funding — much like conducting a thorough community assessment!



Thank you for using this time to learn about community assessments. I'm happy to answer questions about what we just discussed.

You can find more information about the topics we've discussed in Community Assessment Tools, which is available on My Rotary.