



# COMMUNITY ASSESSMENT TOOLS

*A Companion Piece to **Communities in Action:**  
A Guide to Effective Projects (605A)*



ROTARY INTERNATIONAL®

Assessing your community's strengths and weaknesses is an important first step in planning an effective service project. By taking the time to learn about your community's issues, your club can discover new opportunities for service projects and prevent the duplication of existing community assets.

*Communities in Action* (605A) provides detailed guidelines for conducting effective community assessments. The following tools can be used in conjunction with an assessment to ensure that your project will meet community needs and make the best use of available resources. Clubs can adapt these inexpensive assessment options to fit their communities.

### Community Assessment Tools

1. Survey
2. Asset Inventory
3. Community Mapping
4. Daily Activities Schedule
5. Seasonal Calendar
6. Community Cafe
7. Focus Group
8. Panel Discussion

*A sample session plan follows each description below.*

# 1. Survey

A survey is one of the best known and most popular methods of assessing a community's strengths and weaknesses. Surveys can be simple, targeting only a small group of community stakeholders, or complex, sampling large segments of a population. An effective community survey can reveal a wealth of useful and easily quantifiable information and is a good option for many projects.

Careful planning is one of the most important aspects of a successful survey. The design of most surveys begins with a statement of purpose, or why the survey is being conducted. This statement will help you determine what types of questions to ask, how the survey should be administered, and who should be asked to take it. In general, it's best to keep a survey short, with easy-to-understand questions.

Also consider how the survey will be delivered. A survey's design will change depending on the method of delivery (phone, mail, email, website, in-person interview). Keep in mind how the people you want to reach tend to communicate. If few people in your community have Internet access, you might use a paper survey and consider conducting it at a common gathering point like a restaurant or a market. You may need to combine several delivery methods to get a clear picture of the community.

Test your survey on a small group of people before distributing it to your target audience. This will help you identify poorly worded questions or flaws in the survey's design that might result in inaccurate information.

## Interviewing Tips

- Give survey participants enough time to answer questions thoroughly.
- Listen carefully to participants' responses, and respect their opinions.
- Avoid overly personal questions that may make respondents uncomfortable and less willing to participate.
- Assure respondents that their answers are confidential, and maintain that confidentiality.

## Survey session plan

*This session plan for conducting an assessment survey at a community meeting can be adapted to fit your club's specific needs.*

### Objective

Identify the opinions of neighborhood residents about the development of a vacant lot in their neighborhood.

### Time

30-45 minutes, depending on survey length

### Preparation

Ask a small sample group to take the survey and test it for mistakes, unnecessary or flawed questions, and possible points of confusion. Choose a convenient meeting location for neighborhood residents, and arrange to use it for a community meeting. Invite community members to participate in the meeting.

### Materials

*For participants*

- Survey questionnaire
- Pens or pencils
- Tables, clipboards, or other writing surface

*For facilitators/organizers*

- Bins to collect survey responses

### Procedures

1. Before the session begins, place collection bins by the exits or in a convenient place for participants to return their surveys.
2. Introduce yourself and explain the purpose of the assessment. (2-3 minutes)
3. Distribute the survey and writing instruments to participants. Briefly review the survey instructions and answer participants' questions. (5-10 minutes)
4. Allow participants enough time to complete the survey. (15-30 minutes)
5. Thank participants. (5 minutes)

## Sample survey

Next month, the City Council will decide what to do with the vacant lot on the corner of South Street and West Street. As a member of the neighborhood affected by this decision, please take a moment to complete the following survey to let the City Council know how you think the land should be used.

1. How would you feel about these possible uses for the lot? (Circle the number that corresponds to your feelings about each use.)

	Very unhappy	Unhappy	Neither happy nor unhappy	Happy	Very happy
No change	1	2	3	4	5
Dog park	1	2	3	4	5
Children's playground	1	2	3	4	5
Community garden	1	2	3	4	5
Sports park	1	2	3	4	5
Library	1	2	3	4	5
Given to the school	1	2	3	4	5
Community center	1	2	3	4	5
Commercial use	1	2	3	4	5
Residential use	1	2	3	4	5

2. How strongly do you agree with the following statements? (Circle the number that best matches your level of agreement.)

	Strongly disagree	Disagree	Agree	Strongly agree
<b>Neighborhood residents should . . .</b>				
Contribute financially to help develop the vacant lot	1	2	3	4
Volunteer their time to help develop the vacant lot	1	2	3	4
Not have to contribute anything to develop the vacant lot	1	2	3	4
Contribute construction materials to help develop the vacant lot	1	2	3	4

3. What concerns do you have about the development of the vacant lot?

4. How should the City Council keep residents informed of progress on the development of the vacant lot? (check all that apply)

- Hold regular community meetings
- Include progress reports in the daily newspaper
- Send quarterly progress reports to each resident
- Post progress reports in public buildings
- Post progress reports on the city's website

5. Additional comments:

6. How long have you been a resident of the neighborhood? \_\_\_\_\_ years \_\_\_\_\_ months

7. Age: \_\_\_\_\_

8. Gender: \_\_\_\_\_ Female \_\_\_\_\_ Male

Thank you for completing our survey. Please place this form in one of the collection bins before you leave.

## 2. Asset Inventory

An asset inventory is a technique for collecting information about a community through observation. It's similar to a shopkeeper taking stock of merchandise, but instead of cataloging products in a store, community members catalogue assets in their community. It works best when conducted at a community meeting or gathering.

To conduct the inventory, small teams of participants walk around their community identifying people, places, and things they think are valuable. Team members then discuss their choices, create a list for the team, and share it with the larger group.

### Asset inventory session plan

*This session plan for conducting a sample inventory can be adapted to fit your club's specific needs.*

#### Objectives

- Identify community assets that members of the community think are important to community development.
- Reveal why people believe these assets are important.

#### Time

1-1½ hours

#### Preparation

Choose an appropriate meeting location in the target community. You can make the inventory part of a regular community meeting or call a special meeting for it. If you plan to hold a special meeting, find a location and time that will be convenient for most people in the community. The ideal group size is 20 to 30 participants, but this activity can be adapted for smaller or larger groups.

Visit the meeting location to see how large it is, and tour the community. Because you'll be asking participants to walk around the community for about 30 minutes, decide the boundaries in advance. You may also want to prepare a handout or poster describing the asset inventory procedures.

#### Materials

*For participants*

- Pens or pencils
- Paper or notebooks
- Handout with asset inventory directions (optional)

*For facilitators*

- Map of the community, if available
- Chalkboard or dry-erase board, if available

#### Procedures

1. Introduce yourself and explain the purpose of your assessment. (5 minutes)
2. Randomly divide participants into groups of four to six. (5 minutes)
3. Ask each group to take a few minutes for introductions and to choose a team leader who will keep track of time, make sure the group stays on task, and report back to the larger group at the end of the meeting. (5 minutes)
4. Give participants a brief overview of the activity. Explain that they will be walking around the community to identify items they think are important to the community. If necessary, provide examples of community assets. Be sure to explain that each group member should identify at least one item. (5 minutes)
5. Distribute the activity materials to participants. (2 minutes)
6. Have group leaders take their teams out into the community to identify assets. (20-30 minutes)
7. After groups return, ask them to discuss their findings among themselves. Visit each group during the discussion period to monitor its progress and answer questions. (10 minutes)
8. Ask each group to develop a list of 5 to 10 assets they think are most important to the development of the community. (15 minutes)
9. Invite group leaders to briefly share their lists and explain choices. Record the lists on a chalkboard or dry-erase board. (10 minutes)
10. Discuss the assets that groups had in common. Why were these items considered important? Did any groups identify different items? If yes, why were these items chosen? (30 minutes)
11. Collect all the lists and keep them for reference when evaluating your asset inventory.

#### Variations

- Divide participants into groups by gender, age, or profession to reveal differences in the way different groups view the community. Or hold separate asset inventory sessions where you invite only men, only women, or only young people.
- If you're short on time, you might skip the walk around the community.

### 3. Community Mapping

Community mapping is used to reveal people's different perspectives about a community. It requires few resources and little time and can be adapted for participants of virtually any age or educational background.

In this facilitated activity, individuals or groups of participants draw a map of their community, marking certain points of importance and noting how often they visit these places. A facilitator leads a discussion about the maps, while another facilitator records the discussion. Community mapping can be conducted at both informal community gatherings and at meetings to which community stakeholders are invited.

#### Community mapping session plan

*This session plan for conducting a community mapping activity can be adapted to fit your club's specific needs.*

##### Objectives

- Identify participant use and access to community resources.
- Compare perceptions of the importance of various community resources.
- Identify participant needs.

##### Time

1-1½ hours

##### Preparation

Select a meeting location and time that are convenient for people in the community. Because community mapping is most effective with small groups of people — perhaps no more than 20 participants — you may need to conduct multiple sessions for different groups in the community.

Make sure you have the materials you need and have invited enough people to participate.

##### Materials

- Large sheets of flip-chart paper or poster-size newsprint
- Markers in a variety of colors
- Tape
- Sticky notes or small squares of paper

##### Procedures

1. Introduce yourself and explain the purpose of the session. (5 minutes)
2. Divide participants into groups of four to six, either randomly or by age, gender, or profession. (2 minutes)

3. Have group members introduce themselves to one another. (3 minutes)
4. Distribute markers and flip-chart paper to each group, telling participants they'll be drawing a map of their community. (3 minutes)
5. Ask participants to identify a central place in the community to help orient everyone's maps. (5 minutes)
6. Ask each group member to mark his or her place of residence on the map. (5 minutes)
7. Ask participants to continue adding places of importance to them, such as markets, religious centers, schools, community centers, parks, businesses, fields, water sources, government offices, health clinics, police stations, and recreational areas. Visit each group briefly to monitor progress and answer questions. (15 minutes)
8. Ask each group to choose two or three of the following categories and add those places to their map: (5 minutes)
  - a. Places where they spend the most time, using different colors to indicate daily, weekly, monthly, or yearly visits
  - b. Places where they enjoy and don't enjoy spending time, indicated by different colors of markers
  - c. Places, organizations, and institutions that are most important to each group, indicated by a series of marks (checks, stars, Xs)
  - d. Places they would like to add to the community, indicated by sticky notes or small squares of paper
9. Ask each group to briefly discuss its map, including the additional places identified. (10 minutes)
10. Bring the groups together and ask a representative from each to share the group's map. (5 minutes)
11. In the large group, discuss all the maps. What are the differences between them? Why are there differences? Are there any similarities between the maps? If so, why? Have another facilitator record people's comments. (15 minutes)
12. Collect the maps at the end of the activity.

##### Variations

- Have groups tour the community before drawing their maps.
- At the end of the activity, place a blank piece of paper next to each map to enable participants to offer comments on one another's maps.

## 4. Daily Activities Schedule

Finding out about the work habits of community members is an excellent way to learn about a community's division of labor and perceptions of work, based on gender and age. It can also help identify areas where new vocational techniques or tools might be used to improve a community's work efficiency.

In this facilitated activity, participants are separated into groups of men and women and asked to develop an average daily schedule, based on their daily activities. A facilitator leads participants in a discussion of the different activities of community members, while another facilitator records the main points of the discussion.

This type of assessment reveals a great deal about perceptions of gender that might limit the effectiveness of a service project by affecting the participation of some community stakeholders. It can also provide important information about when different groups of people are available to participate in certain types of activities.

### Daily activities schedule session plan

*This session plan for conducting a daily activities schedule assessment can be adapted to fit your club's specific needs.*

#### Objective

Identify the daily routines of different people in your community.

#### Time

1-1½ hours

#### Preparation

Select a convenient meeting location and time. Invite people from the community to participate — 20 to 30 people is an ideal number, with an equal number of men and women.

#### Materials

- Large sheets of flip-chart paper or poster-size newsprint
- Blank sheets of paper for each participant
- Pens or pencils
- Markers in a variety of colors
- Tape

#### Procedures

1. Introduce yourself and explain the purpose of the assessment. (5 minutes)
2. Ask everyone to take a moment to think about all the activities he or she does each day, such as household chores, work, and recreation. (5 minutes)
3. Ask participants to write down their schedule on a typical day. (10 minutes)
4. Divide participants into groups of four to six, based on gender. (5 minutes)
5. Ask the members of each group to briefly discuss what their schedules have in common. (10 minutes)
6. Ask each group to develop a generic daily schedule. (10 minutes)
7. Bring everyone together and ask a spokesperson from each group to briefly describe his or her group's daily schedule. (5 minutes)
8. Discuss the differences and similarities between the groups' schedules. (20 minutes)

Ask:

- a. What are the differences?
  - b. What are the similarities?
  - c. Why are there differences?
  - d. What could be done to reduce people's workloads?
  - e. What would be the best time of day for a meeting or training?
9. Collect everyone's daily schedules for reference, keeping them separated by group.

#### Variation

Create daily schedules for different members of the community. For example, you might have a group of students and a group of business professionals compare their schedules.

## 5. Seasonal Calendar

This activity reveals changes in seasonal labor supply and demand, household income patterns, food availability, and demands on public resources, such as schools, mass transit systems, and recreational facilities.

In this facilitated activity, a group of community members is divided into smaller groups based on age, gender, or profession. A facilitator asks each group to identify different tasks members must do at different times of the year (related to paid and unpaid work, social events, educational activities, family health, and environmental changes) and plot them on a timeline, which they then share with the other groups. The facilitator leads a discussion in which participants examine the differences.

These results can be used to determine the best times of the year to begin certain projects and to consider how projects will affect different groups of people.

### Seasonal calendar session plan

*This session plan for conducting a seasonal calendar activity can be adapted to fit your club's specific needs.*

#### Objective

Identify a community's yearly patterns of labor, household income and expenditures, health and welfare, and recreation.

#### Time

2 hours

#### Preparation

Select a meeting place and time that are convenient for members of your community. Invite 20 to 30 people to participate.

Create a sample seasonal calendar, and prepare handouts for each participant.

#### Materials

- Large sheets of flip-chart paper or poster-size newsprint
- Blank sheets of paper for each participant
- Handouts of sample seasonal calendars
- Pens or pencils
- Markers in a variety of colors
- Tape

#### Procedures

1. Introduce yourself and explain the purpose of your assessment. (5 minutes)
2. Divide participants into groups of four to six, and distribute several sheets of flip-chart paper and markers to each group.
3. Ask groups to draw a timeline starting from the month they consider the beginning of the year, with each month labeled along the top of the timeline. (10 minutes)
4. Ask groups to use different-colored markers to indicate when different seasons begin. For example, the rainy season might be marked in green, the dry season in yellow, and the storm season in black. (15 minutes)
5. Ask each group to mark activities that take place throughout the year. For example, they might indicate when local schools are in session, major holidays occur, crops are being planted or harvested, the most food is available, people tend to fall ill. Encourage them to include as many major activities they can think of. (15 minutes)
6. Ask groups to use different symbols to indicate who performs each activity and the level of activity involved. For example, a dotted line might indicate an activity that requires little work, a thin line a moderate level of work, and a thick line an intense level of work. (15 minutes)
7. Ask groups to look at the patterns and discuss the following questions: (15 minutes)
  - Are some times of the year busier than others?
  - Are there times of the year when certain people are busier than others?
  - Are there times of the year when people are vulnerable to environmental changes (e.g., extreme temperatures, drought, flooding, patterns of infectious disease)?
  - What are the most important times of the year in the community (e.g., public holidays, festivals, labor cycles)?
8. Have a representative from each group present its calendar to the whole group, and facilitate a discussion of the similarities and differences. (15 minutes)

#### Variation

Divide participants by age or gender to reveal age- and gender-based differences in people's seasonal routines.



## 6. Community Cafe

A community cafe creates the atmosphere of a restaurant or cafe in which small groups of people from the community discuss issues raised by facilitators. It can be both an entertaining event for Rotarians and a unique way to learn about a community by engaging stakeholders in a direct dialogue.

Each table has a “host,” or facilitator, who guides discussions on a particular topic. Participants move from table to table after a certain amount of time. As each issue is discussed, major ideas are recorded by the hosts, who report the most common ideas from their discussions to the cafe “maitre d’,” or head facilitator. Clubs can use these ideas to determine what projects to undertake in their communities.

### Community cafe session plan

*This session plan for conducting a community cafe can be adapted to fit your club’s specific needs.*

#### Objectives

- Engage community stakeholders in meaningful discussions about their community.
- Identify the major issues a community faces.
- Establish relationships between your club and the community.

#### Time

1½-2 hours

#### Preparation

Although a community cafe can be run by a single facilitator, it is recommended that clubs choose one lead facilitator and a team of assistants to host each discussion table. Choose table hosts who are able to listen carefully and to guide, rather than dominate, discussions. Participants will move from one discussion table to another, so choose a location that’s both convenient for participants and large enough to enable people to move around easily.

Meet with your team of table hosts to clarify the purpose of the community cafe. Consider these questions:

- What issues do we want to discuss?
- Who should be invited? You’ll need at least 20 participants to yield productive discussions.
- What questions should we ask to stimulate creative thinking and meaningful discussion?

Decide each table’s discussion topic(s) and the table host’s role in the discussion.

Serving food is an important part of this activity. Usually, light snacks accompanied by coffee, tea, and soft drinks are best because they will not impede conversation and are easy to

transport from one table to another. Create an environment in which participants will feel comfortable and free to discuss issues as though they were at a dinner with friends.

Send invitations, clearly describing the purpose of the event.

#### Materials

- Invitations
- Food, beverages, and utensils (if needed)
- Enough tables and chairs to allow for a different discussion topic at each table
- Pens or pencils for each table host
- Notepads for each table host

#### Procedures

1. Before participants arrive, make sure your food, tables, and hosts are in place. (15-30 minutes)
2. Greet participants as they arrive, encourage them to get food and drink, and seat them at discussion tables. (15-30 minutes)
3. Once everyone has arrived, introduce yourself and explain the purpose of your assessment and the procedures for the discussions. (5-10 minutes)
4. Have the table hosts start their discussions, taking notes and facilitating the discussion.
5. Every 20 minutes, have participants switch tables to discuss a different issue or topic. Before the discussion begins, have each table host summarize the main points from the previous group’s discussion. Continue the process until everyone has discussed each topic.
6. Ask each host to share with the entire group a summary of the major ideas discussed at his or her table. (15-20 minutes)
7. Thank participants for attending. (5 minutes)
8. Meet briefly with all the hosts to discuss what they learned and observed. Collect the notes from each table and summarize the major themes. (10-20 minutes)
9. Send your summary report to participants after the event.

#### Variations

- Keep tables together and have each table host discuss a different topic every 20 minutes.
- Have one participant at each table serve as table host.

## 7. Focus Group

A focus group is a carefully planned discussion used to determine a community's preferences and opinions on a particular issue or idea. Conducting a focus group requires careful planning and someone skilled at facilitating discussions. Most focus groups consist of 5 to 10 diverse stakeholders. Participants are asked a series of carefully worded questions that focus on different issues in the community.

An effective focus group will seem more like a job interview than a lively debate or group discussion. Though some clubs include a focus group at a club meeting, it can be more effective to conduct a focus group in a private setting, with one or two facilitators and someone to record participant responses.

### Focus group session plan

*This session plan for conducting a focus group can be adapted to fit your club's specific needs.*

#### Objectives

- Identify stakeholders' opinions about specific community issues.
- Identify how stakeholders believe these community issues should be addressed.

#### Time

1-2 hours

#### Preparation

Select a location that is both convenient and private for a small-group discussion.

Develop a list of concepts you wish to discuss. These could include issues that your club thinks might exist in the community, ideas for service projects, or people's perceptions of community resources. Take time to develop questions that will help guide your discussion and encourage participants to share their ideas.

Arrange for another Rotarian facilitator to record the focus group session or take notes of participants' responses. At least one week before the event, invite 10 to 20 people to participate. Make sure they are representative of the community and can communicate effectively.

#### Materials

- Name tags
- Pens or pencils for participants
- Notebooks for participants
- Chairs (arranged in a circle)
- Recording equipment, if available
- Refreshments
- Gift or honorarium for participants

#### Procedures

1. Welcome participants as they arrive, but avoid talking about the topic of the focus group. (5-10 minutes)
2. Introduce yourself and explain the purpose of the focus group. (5 minutes)
3. Begin with a warm-up question before moving on to the main issue. Ask each participant to answer, and briefly summarize his or her response. (10 minutes)
4. Introduce the main topic of discussion, and guide the discussion using your prepared questions. (15-30 minutes)
5. Allow each person time to answer. Listen carefully to the ideas expressed, asking for clarification if needed but avoiding confrontations or debates.
6. Summarize the main points discussed, and thank people for their participation. (10 minutes)

#### Variation

Try doing separate focus groups on the same issue with members of your club and non-Rotarians from the community. Are the responses the same or different?

## 8. Panel Discussion

A panel discussion is a guided exchange involving several experts on a specific subject. Panel discussions are carefully structured and typically involve a facilitator who asks panelists specific questions about the community or a particular issue. Often, city governments, nonprofit or nongovernmental organizations, hospitals, and universities pay experts to collect and interpret detailed information about communities and the issues they face. Drawing on this expertise is an excellent way to learn about a community without having to invest a lot of time or money in a new community assessment.

Before conducting a panel discussion, identify community members who are qualified to talk about particular issues and resources. Panels generally have four to six experts on a particular issue (for example, a discussion on community health might include a doctor from a local hospital, a health official from a government health office, a professor from a local university who researches community health issues, and a community health care specialist from a local nonprofit or nongovernmental organization). To get a broader view of the community, consider facilitating a series of panel discussions on different issues.

Panel discussions are a powerful tool to raise the awareness of club members and to quickly learn about service opportunities from experts.

### Panel discussion session plan

*This session plan for conducting a panel discussion can be adapted to fit your club's specific needs.*

#### Objective

Hear what experts have to say about specific community issues.

#### Time

1 hour

#### Preparation

Select the issue your club would like to learn more about, and identify four to six experts from the community with specific knowledge or experience related to that issue. Strive for a balanced panel with people from a variety of backgrounds. (Keep in mind that expertise isn't necessarily determined by someone's title, education level, or profession.)

Invite the potential panelists to participate, explaining the purpose of your panel discussion. Ask if they have any handouts that can be distributed to your club members, and offer to make copies for all attendees.

Carefully consider the discussion questions you'll pose to the panel. Make arrangements to record the discussion or have someone take detailed notes.

#### Materials

- A table and chairs arranged to face the audience
- Microphones and amplification equipment, if necessary
- Name tags for each panelist
- Overhead projector or other projection equipment (optional)
- Seating for audience members

#### Procedures

1. Introduce the panelists and the discussion topic. (5 minutes)
2. Ask the prepared questions, giving each panelist an opportunity to speak. (30 minutes)
3. Open the floor to questions from the audience. (15-20 minutes)
4. Summarize the discussion, and thank panelists for their time. (5 minutes)

#### Variation

Hold expert panel discussions for each of Rotary's six areas of focus.



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