The Community Assessment Process

Step 1: Define the Scope

Step 2: Decide to Go Solo or Collaborate

Step 3: Collect Data

Step 4: Determine Key Findings

Step 5: Set Priorities and Create an Action Plan

Step 6: Share Your Findings

Define the Scope

Community issues are complicated. One issue is often related to many others, and it is easy to keep expanding the range of issues to include in your community assessment.

A community assessment can address all of the issues and their interrelationships, or it can focus on just one issue. To define the scope of your community assessment, you must clearly identify the community issue to be assessed, the impacted community members, the geographic area to assess, the key questions you want answered, and the level of detail you want to include in the assessment.

Decide to Go Solo or Collaborate

Deciding the scope will highlight the choices available to you for conducting your community assessment. You can decide to “go solo” and carry the entire responsibility for completing all of the community assessment activities; or, you can work with community partners as a collaborative project to complete the assessment. Potential community partners include nonprofit organizations, local community organizations, foundations that provide grants to your community, universities, and government entities.

One of the most important factors to consider is the level of resources you have to conduct a community assessment. Examine the time, effort, and human resources that are available from your various stakeholders, including staff, volunteers, consultants, and board members. Establishing collaborations will increase the resources available to conduct a quality and useful assessment.

Benefits of Collaboration:

- Engages more community members in the assessment planning and implementation.
- Increases access to more data sources to answer the key questions.
- More resources are available to conduct the assessment and cover expenses.
- Establishes relationships that will be important for leading actions identified in the community assessment findings.

Collect Data

This step will guide you through finding credible sources of information and, when necessary, developing your own data collection tools. In any data collection effort, it is essential that you first set limits on how much data you will collect and analyze. Consider the amount of time and resources you have available prior to selecting any specific method or combination of methods. Prioritize your data collection needs according to what is essential to complete your community assessment. Document your data collection efforts using the “Creating a Data Collection Plan Worksheet.” In using this tool, you will list the key questions that you identified in Step 1 and then identify probable sources of information.

Your community assessment will be based on two types of data sources: secondary and primary. Start your data collection with secondary sources—data that has already been collected by others. Other members of your community may have the information that you seek. Begin with local sources of information and then broaden your search as necessary. Focus on quality of data as opposed to quantity, so you can dedicate more time to other aspects of the community assessment. For a table of potential secondary sources, see “Locating Secondary Sources of Information.”

Primary data is data collected by the person or group conducting the assessment. Primary source data collection methods should be used to address questions that cannot be answered by secondary sources or to gain a better understanding of a particular issue. There are several methods for collecting primary sources of data for your community assessment, including questionnaires, observation, focus groups, interviews, and case studies. For a description of these methods, including the advantages, disadvantages, resources, and amount of time required for each one, refer to the online tools listed on the following page.

Your timeline should reflect the level of detail you want in your community assessment. A community assessment can be a “snapshot” of a community need based on local secondary sources and few primary sources; or it can be comprehensive, based on an extensive review of secondary sources and many sources of primary data. Clarify who will be responsible for carrying out different parts of the data collection plan. Set data collection deadlines and stick to them. It is easy to spend too much time in the data collection phase.

Determine Key Findings

The data collection step will result in a lot of data and information about your community needs and assets. You can analyze the data to identify the assessment's key findings. Key findings serve several purposes:

- They validate anecdotal evidence of community needs and assets.
- They highlight significant trends found in the data collection process.
- They reveal differences across segments of the community.
- They help clarify answers to the community assessment's key questions.

The key findings can be organized into categories to help summarize the data. When you separate your key findings from one another, you can use them more effectively when planning your response. Common key findings categories used in community assessments include strengths, gaps, opportunities, and challenges.

Set Priorities and Create an Action Plan

The completion of a community assessment process should allow you to make informed decisions about your goals and objectives. You are able to identify specific needs that came up in your assessment that you want to address. Step five of the community assessment process is to set priorities based on your findings and create an action plan to guide your post-assessment planning. For each part of your plan, determine how you will measure the effectiveness of your actions. Adopt measures that help define your strategy and that you will be able to track over time.

Priority setting is difficult. It requires developing consensus among community members with different opinions and views on how community issues should be addressed. The following is a list of the four barriers to priority setting and suggestions for minimizing these barriers:

1. The Human Problem — the difficulty of getting people to focus on key issues, decisions, and conflicts:

- Start by striving for consensus on what you are trying to accomplish by priority setting. Why are we doing this and what are the stakes?
- Actively recognize that there is strength in differing viewpoints and don't place viewpoints in value order.
- Build in time to allow people to reflect on information presented, digest it, and modify decisions.

2. The Process Problem — the challenge of managing information and ideas during a priority-setting process:

- Be very specific in defining priorities to minimize multiple interpretations.
- Make key information available prior to decision meetings.
- Beware of taking too much time to analyze information ("analysis paralysis") and/or rushing to meet deadlines.

3. The Structural Problem — the difficulty of priority setting across different issue areas:

- Cultivate open communication:
- Carefully nurture relationships throughout the planning process.
- Keep focus on current priorities, not precedent.

4. The Institutional Problem — the challenge of translating priorities into action:

- Build on existing strengths in implementation.
- Ensure that you have a well-defined implementation plan.
- Make sure that individuals responsible for carrying out key tasks are committed to implementing changes.

Share Your Findings

The last step of your community assessment is to share what you have learned with others and to disseminate your plan. Now that you have taken the time to find out information about your community, you should allow the community to benefit from your findings. Community members are more likely to support your efforts when they have a clear understanding of the work you have done and of what their community needs.

You can hold community meetings to share your report with community members or issue press releases to increase dissemination in different media outlets. In addition to the full report, consider publishing a one page brochure to summarize key findings and actions from the community assessment. The full report should be available on your website. If you collaborated with community partners, the report should be available on their websites as well.

Tips for Steps 4–6:

- Remember that key findings should point to an asset or need of the population of your community.
- Key findings may be related to more than one summary category.
- Use information from your community assessment to document your priorities.
- Use charts and graphs to illustrate the finding for non-technical people.
- Continue to work with community members to identify your implementation team.
- Give community members that were not involved in the assessment an opportunity to participate in the implementation.

Action Plan Template

Key finding	Activity/ Response	Deadline	Person(s) responsible	Indicators of success