



COMMUNITY ASSESSMENT TOOLS

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

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-EN) provides detailed guidelines for conducting effective community assessments. The following tools can be used in conjunction with the 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 specific 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.



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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 very simple, targeting only a small group of community stakeholders, or quite complex, sampling large segments of a population. A good survey can reveal a wealth of useful and easily quantifiable information.

The size and complexity of a survey will depend on a club's financial resources and familiarity with survey design and delivery. Large, professionally done surveys in North America, for example, are often expensive and may cost more than US\$10,000 for a sample of 500 people. Effective community surveys, however, can be done for less money and are a good option for many projects.

Careful planning is one of the most important parts of any successful survey. The design of most surveys begins with a purpose statement, or reason why the survey is being conducted. This purpose statement will help you determine what types of questions to ask, how the survey should be administered, and who should 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 (for example, phone, mail, Internet, 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 or one given 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 some 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 any questions participants may have. (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 your opinion on how 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
<i>Neighborhood residents should:</i>				
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 Web site

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 return this response form to 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 observing 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. This can be part of either a regular community meeting or a special meeting held to do the asset inventory. If you plan to hold a special meeting, find a location and time that will be convenient for most people in the target community. The ideal group size is 20-30 participants, but this activity can be adapted for smaller or larger groups.

Visit the meeting location to see how large it is and to 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 procedures for your asset inventory.

Materials

For participants

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

For facilitators

- Map of the community, if available
- Chalk board or marker 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 people. (5 minutes)
3. Ask each group to take a few minutes to introduce themselves and to choose a team leader. The team leader 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 some examples of different community assets. Be sure to explain that each group member must identify at least one item. (5 minutes)
5. Distribute the activity materials to participants. (2 minutes)
6. Ask group leaders to take their teams out into the community to identify community assets. (20-30 minutes)
7. After groups have returned, ask them to discuss their findings. Visit each group during their discussion to monitor their progress and answer questions, if needed. (10 minutes)
8. Ask each group to develop a list of the top 5-10 assets they think are most important to the development of their community. (5 minutes)
9. Invite group leaders to briefly share their lists and explain choices. You or another Rotarian may want to record the lists on a chalkboard or marker board. (10 minutes)
10. Discuss the assets that each group had in common. Why were these items considered important? Did any groups identify different items? If yes, why were these different items chosen? (10 minutes)
11. Collect each group's list, 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 different people's perspectives about a community. It requires few resources and little time and can be adapted for people of virtually any age range or educational background.

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

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 will be convenient for people in the community you wish to learn about. Community mapping is a good tool to use with small groups of people, perhaps 20 participants in all. As a result, it may be necessary to conduct multiple sessions for different groups in the community.

Make certain you have all the materials needed 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 your assessment. (5 minutes)
2. Divide participants into groups of four to six people, either randomly or by age, gender, or profession. (2 minutes)
3. Take a moment for group members to briefly introduce themselves to one another. (3 minutes)

4. Distribute markers and flip-chart paper to each group. Tell participants that 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 their progress and answer any questions. (15 minutes)
8. Next, 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, or 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 their map, including the additional places named in the categories above. (10 minutes)
10. Afterward, bring the groups together and ask a representative from each one to share the group's map. (5 minutes)
11. In the large group, discuss each map. What are the differences between each map? Why are some maps different from others? Are there any similarities between the maps? If so, why? Have another facilitator record people's comments for future reference. (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 that participants can use to comment on each other's maps.

Adapted from Gender and Development Training Handbook Booklet #5 PACA Tools, U.S. Peace Corps, 2006, www.peacecorps.gov/library/pdf/GED5_pacatools.pdf.

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 two groups (men and women) and asked to develop an average daily schedule, based on their own 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 lot about a community's perceptions of gender that might limit the effectiveness of a service project by reducing the equal participation of community stakeholders in a project's planning and implementation. It can also provide crucial information about when different groups of people are available to participate in certain types of activities and reveal ways to reduce the amount of work people do.

Daily Activities Schedule Session Plan

This session plan for conducting a daily activities schedule activity 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 for your daily activities. Invite people from the community to participate, around 20-30 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 your assessment. (5 minutes)
2. Ask each person to take a moment to think about all the activities they do each day, such as household chores, working, and recreation. (5 minutes)
3. After they have thought about their activities, ask them to write down their schedule on a typical day. (10 minutes)
4. Once everyone has completed their individual schedules, divide people into groups of four to six, based on their gender. You should have at least one group of men and one group of women. (5 minutes)
5. Ask each group to briefly discuss what their schedules have in common. (10 minutes)
6. Next, ask each group to develop a generic daily schedule for themselves. (10 minutes)
7. Bring everyone together and ask a spokesperson from each group to briefly describe their group's daily schedule. (5 minutes)
8. Discuss the differences and similarities between each group's schedules. Ask: (20 minutes)
 - 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 look at a group of students and a group of business professionals to compare their schedules.

Adapted from Gender and Development Training Handbook Booklet #5 PACA Tools, U.S. Peace Corps, 2006, www.peacecorps.gov/library/pdf/GED5_pacatools.pdf.

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 they 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 that they share with the other groups. The facilitator leads a discussion in which participants examine the differences and explain their choices.

These results can be used to determine the best times of the year to begin certain projects and 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 expenditure, health and welfare, and recreation.

Time

1½-2 hours

Preparation

Select a meeting place and time that is convenient for members of your community. Invite 20-30 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 the participants into groups of four to six people, 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 to be the beginning of the year. Each month of the year should be 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 different 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, or people tend to fall ill. Encourage them to include as many major activities as they can think of. (15 minutes)
6. Once activities are plotted on the seasonal calendar, ask groups to use different symbols to indicate who does each task 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. Next, ask groups to look at the patterns and discuss the following questions: (15 minutes)
 - Are some times of year busier than others?
 - Are there times of the year when certain people are busier than others?
 - Are there any times of the year when people do not have enough food or water?
 - What are the most important times of the year in the community?
8. Have a representative from each group present their calendars to the whole group, and facilitate a discussion of the similarities and differences. (15 minutes)

Variation

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

Adapted from Gender and Development Training Handbook Booklet #5 PACA Tools, U.S. Peace Corps, 2006, www.peacecorps.gov/library/pdf/IGED5_pacatools.pdf.

6. Community Cafe

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

Each table has a “host,” or discussion 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, at the end. Clubs can use these ideas to decide which projects to do 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 communities.
- 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 assistant facilitators to host each discussion table. Choose table hosts who are able to listen carefully to participant ideas and guide rather than dominate discussions. During the event, participants will be asked to move from one discussion table to another, so choose a location that’s convenient for participants but large enough to allow 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 to our community cafe? (You’ll need at least 20 participants to yield productive discussions.)
- What questions should we ask at each table to stimulate creative thinking and meaningful discussion?

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

Serving food is an important part of this activity. Usually, light snacks accompanied with coffee, tea, or soft drinks are best because they will not impede conversation and are easy to transport from one table to another. Create a hospitable environment in which participants will feel comfortable and free to discuss issues as though they were at a dinner with friends.

Send invitations to participants, clearly describing the purpose of the event.

Materials

- Invitations
- Food, drinks, and eating utensils (if needed) for participants
- Enough tables and chairs for everyone, ideally with 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 of what participants say and facilitating the discussion of their designated topic.
5. Every 20 minutes, have participants switch tables to discuss a different issue or topic. Before participants start discussing a new topic, each host summarizes the main points from the previous group’s discussion. Continue the process until everyone has discussed each topic.
6. Ask each host to share a summary of the major ideas discussed for the entire group. (15-20 minutes)
7. Thank participants for attending. (5 minutes)
8. Afterward, 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. Share your summary report with participants.

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.

Resources

- *Participatory Methods Toolkit: A Practitioner’s Manual* — A joint publication of the King Baudouin Foundation (www.kbs-frb.be), the Flemish Institute for Science and Technology Assessment (viWTA) (www.viWTA.be), and the United Nations University Comparative Regional Integration Studies (www.cris.unu.edu)
- The World Cafe (www.theworldcafe.com)

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 are composed of a small but diverse group of 5-10 community stakeholders. Participants are asked a series of carefully worded questions that focus on different issues in the community.

Effective focus groups will seem more like an interview for a job rather than a lively debate or group discussion. Some clubs use a focus group at a club meeting to learn more about issues in their community. However, it's sometimes more effective to conduct focus groups in more private settings 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 existing community resources. Take some 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 10-20 people to participate. Make sure they are representative of the community, don't know one another or any of the facilitators, and can communicate effectively.

Materials

- Name tags
- Pens or pencils for each participant
- Notebooks for each participant
- Seats arranged in a circle facing one another
- 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. After all the participants have arrived, introduce yourself and explain the purpose of your assessment. (5 minutes)
3. Begin with a warm-up question before moving on to the main issue. Ask each participant to answer, and briefly summarize their responses. (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 their ideas, 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 with Rotarians in your club and people in the community on the same issue. Are the responses the same or different?

8. Panel Discussion

A panel discussion is a guided discussion involving multiple experts in a specific area. Panel discussions are carefully structured and typically involve a facilitator who asks panelists specific questions about the community or a particular issue. Often, organizations like 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 upon 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 an expert panel discussion, consider which people in the community would be qualified to comment on particular issues and resources. Panels are usually composed of 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 that 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 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

- Identify what experts in a particular field believe 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 who might have specific knowledge or experience dealing with your 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.)

Once you've identified potential panelists, invite them to participate, and explain the purpose of your panel discussion. Ask if they have any handouts that can be distributed to members of your club, and offer to make copies for everyone in attendance.

Carefully consider the discussion questions you'll pose to the panel.

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)
- Chairs for audience members

Procedures

1. Introduce your panelists and the topic of your panel discussion. Record the discussion or have someone take notes of what people say. (5 minutes)
2. Ask the questions you've prepared, and allow each panelist opportunities to speak. (30 minutes)
3. Open the floor to questions from the audience. (15-20 minutes)
4. Summarize what people have said, and thank panelists for their time. (5 minutes)

Variation

- Hold expert panel discussions for each item on Rotary's Menu of Service Opportunities.

Resource

- *A Menu of Service Opportunities* (605B-EN)