Conducting, Sharing, and Utilizing a Community Needs Assessment

Workshop Facilitation Guide

Implementing the ROMA Cycle in the “Next Generation” Performance Management Framework

Created through the Partnership’s Organizational Standards Center of Excellence and funded by the Office of Community Services

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# Table of Contents

- **Introduction** .................................................................................................................. 3  
- **Module Description** ......................................................................................................... 3  
- **Module Learning Objectives:** ........................................................................................... 3  
- **Overview** ......................................................................................................................... 4  
- **Module Outline** .................................................................................................................. 5  
- **Slides and notes to the Facilitator** .................................................................................... 6

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**Introduction**

This is one in a series of trainings based on material produced in collaboration between ANCRT and the Partnership. This workshop facilitation manual takes participants “beyond the basics” of Assessment, the first piece of the ROMA cycle.

The facilitation of this module may be adapted to the needs of the agency – either as a training conducted in the local agency or as a facilitative guide to conducting a community needs assessment.

**Module Description**

This module is designed to support a local Community Action Agency as they conduct, analyze, and compile a comprehensive CNA. It is intended to guide and enhance the process and final result of the CNA, as well as how it connects to other agency processes. It will also touch on how agencies can share and utilize their CNA for decision making, community partnerships, advocacy, grant writing, and planning.

This module consists of an in-person workshop session with PowerPoints. A Community Needs Assessment Webinar Series can be accessed if the facilitator and/or participants want to use this as introductory learning.

- Planning for a Community Needs Assessment, [click here](#)
- Collecting Community Needs Assessment Data, [click here](#)
- Analyzing Community Needs Assessment Data, [click here](#)
- Communicating Community Needs Assessment Data, [click here](#)

This guide and the accompanying PowerPoint will support facilitation of the workshop.

**Module Learning Objectives:**

Participants will:

- Clarify importance of Needs Assessments for Community Action
- Consider “infrastructure” useful for a successful CNA process
- Identify tools and strategies for analyzing data by demographics and geography
- Understand the relationship between data from agency sources and other quantitative and qualitative data that is collected
- Understanding how clear identification of the causes of poverty in your community can guide the use of the full ROMA Cycle
- Practice prioritizing the needs
- Discuss creating succinct explanation of findings
- Understand the importance of having realistic strategies for sharing findings with your Board and others
Overview

**Intended Audience:**
Community Action Agency directors, managers, staff, board members, customers, and volunteers. May include partners or others from the community.

**Workshop Prerequisites:**
CNA Webinar Series (linked above), if desired.

**Workshop Goal:**
Participants will understand the expectations and steps of a Community Needs Assessment. If used as a facilitative guide to conduct and compile the CNA, the agency will also have a comprehensive CNA as a result.

**Workshop Length:**
6-8 hours – note it can be done in short sessions, perhaps as the agency is working on their community needs assessment.

**Trainer Requirements:** Nationally Certified ROMA Trainer (NCRT), Nationally Certified ROMA Implementer (NCRI), or other experienced facilitator with understanding of ROMA.

**Materials Needed:**
[Conducting, Sharing, and Utilizing a CNA PowerPoint](#), computer, projector, screen, flip chart, markers, tape, scrap paper, nametags and/or table tents, post it notes, sign-in sheet, and evaluation (see [additional materials](#)). It is recommended for participants to bring laptops for collecting quantitative data through the [CNA Online Tool](#).

**Handouts Needed:**
- Copies of agency’s most recent Community Needs Assessment
- Data Collection Plan Worksheet
- Analysis Worksheet
- Focus Group Sample Guide 1
- Interview and Focus Group Questions – Sample Guide 2
- Qualitative Data Collection Tips
- Tips for Sharing your Community Needs Assessment

**Number of Participants Recommended:** minimum of 8 (for activity – other sizes could be accommodated)

**Room Set-Up:** half-rounds or any set up conducive to transitioning easily between full group discussions and small group activities.

**Evaluation:** Completed CNA (if used to facilitate the process), Learner Centered Feedback end of session evaluation
Module Outline
This is a loose guide that can be modified based on activities used and time taken for discussions. Below is a 6 hour version, but it could go up to 8 hours total based on previous facilitation.

<table>
<thead>
<tr>
<th>Content</th>
<th>Delivery Method</th>
<th>Time</th>
<th>Slide #</th>
<th>Materials Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival- Sign in</td>
<td>Networking</td>
<td>15 min</td>
<td>1</td>
<td>Sign in sheet, name tags or table tents</td>
</tr>
<tr>
<td>Introductions and Learning Objectives</td>
<td>Facilitator led, participants respond</td>
<td>15 min</td>
<td>2-3</td>
<td>Flip chart – to record what people might want to learn</td>
</tr>
<tr>
<td>Background, purpose, history, and overview</td>
<td>Lecture Followed by optional discussion</td>
<td>20 min</td>
<td>4-15</td>
<td>Previous CNA for reference; some slides could be made into handouts if desired</td>
</tr>
<tr>
<td>Plan</td>
<td>Lecture Small group activity Large group discussion</td>
<td>30 min</td>
<td>16-26</td>
<td>Data Collection Matrix Worksheet</td>
</tr>
<tr>
<td>Collect Quantitative Data</td>
<td>Lecture Large group activity Individual work</td>
<td>70 min</td>
<td>27-33</td>
<td>Laptops for CNA Online Tool</td>
</tr>
<tr>
<td>Collect Qualitative Data</td>
<td>Lecture Large group demonstration</td>
<td>70 min</td>
<td>34-44</td>
<td>Focus Group and Interview Guide Sample Options Qualitative Data Collection Tips</td>
</tr>
<tr>
<td>Analyze Data</td>
<td>Lecture Activity</td>
<td>90 min</td>
<td>45-67</td>
<td>Analysis Worksheet</td>
</tr>
<tr>
<td>Prepare &amp; Communicate the Report</td>
<td>Lecture Discussion Optional activity</td>
<td>30 min</td>
<td>68-95</td>
<td>Tips for Sharing the CNA Worksheet</td>
</tr>
<tr>
<td>Questions, Resources, &amp; Contacts</td>
<td>Q &amp; A</td>
<td>20 min</td>
<td>96-105</td>
<td>Evaluations</td>
</tr>
</tbody>
</table>
Welcome participants, ensure handouts are available, and take care of any housekeeping items as you begin.
Welcome & Introductions

• Who’s here?
  – Name, Organization, Role
• What is your prior involvement in a Community Needs Assessment?
  – None
  – Some
  – Lead it
• What is one thing you’d like to improve on or learn?

The facilitator is trying to get a sense of who is in the room – board members, staff (upper management, direct service?), volunteers, community members???

Ask participants to say something about themselves.

This is what you need to know as the facilitator -
It will be different with different groups. You may know all the participants and they may know each other, so then you may ask them to say something they don’t think the others know about themselves. If the group is unfamiliar to you and to each other you will want more info.

Name, of course, even if everyone knows everyone else as this announces that they are present and ready to participate.

Other information could be their role, what they are hoping to have at end of day, or other basic information.
Learning Objectives

• Clarify importance of Needs Assessments for Community Action
• Consider “infrastructure” useful for a successful CNA process
• Identify tools and strategies for analyzing data by demographics and geography
• Understand the relationship between data from agency sources and other quantitative and qualitative data that is collected
• Understanding how clear identification of the causes of poverty in your community can guide the use of the full ROMA Cycle
• Practice prioritizing the needs
• Discuss creating succinct explanation of findings
• Understand the importance of having realistic strategies for sharing findings with your Board and others

How We Hope You Walk Away From This Workshop
- Remembering why CNA Important for Community Action
- Understanding the necessary Infrastructure for the process
- Considering Pros and Cons for Data Collection Strategies—how best to coordinate these
- Learning Strategies to Analyze by Demographics and Geography
- Understand the Relationship between agency data and Collected Data
- Practice discussing causes of poverty—how that guides planning
- Practice prioritizing needs
  - How to have succinct explanation of Findings
- Strategies for how to share with the board

- And potentially, with a complete CNA if used to facilitate the process!
Have a discussion with participants to get their thoughts on why CNA are so important to Community Action. The next slides will fill in any missed areas or reiterate their thoughts.
Needs Assessments have **a long history** in Community Action

**OEO Instruction 1964:**
In developing its strategy **and** plans, the CAA shall take into account the **areas of greatest community need, the availability of resources, and its own strengths and limitations.**

*In other words must assess community needs and resources and also agency needs and resources.*

The CSBG Act – 1981, 1998: **include** assessment in the **Community Action Plan**
The Community Services Block Grant (CSBG) Act (42 USC Sec. 9901 *et seq.*) requires all community action agencies, private nonprofit organizations, and public organizations that receive CSBG allocations to submit a **community action plan** for their CSBG service area that includes a community needs assessment for the community served, which may be coordinated with community-needs assessments conducted for other programs.

According to legislation, the purpose of the assessments and the plan is **to identify the improvements or results it will achieve**

**From IM 49** – February 21, 2001

“OCS believes that the core activities constituting ROMA implementation for Eligible Entities are:

1. **The entity and its board** complete regular assessments of the entity's overall mission, desired impact(s) and program structure, taking into account: 1) the needs of the community and its residents; 2) the relationship, or context, of the activities supported by the entity to other anti-poverty, community development services in the community; and 3) the extent to which the entity's activities contribute to the accomplishment of one or more of the six ROMA national goals”

This guidance has kept our network ACCOUNTABLE as ANTI-POVERTY agents: including making sure we identify **where, how, and why we spend the resources** we have to BEST serve the NEEDS of people with low-income
As indicated in IM 49, Assessment is an important part of the full ROMA Cycle. Not only does it feed into planning, but it continues to impact the rest of the cycle.

As facilitator, you can also note other connections between the pieces of the ROMA Cycle as well. Examples - As you Achieve Results, you can refer back to the Assessment to determine what impact your agency is having on the needs that were assessed. As you implement strategies, think about what people may have said about accessibility of services in the surveys for your CNA.
Organizational Standards

- Standard 3.1 • The organization conducted a Community Assessment and issued a report **within the past 3 years.**

- Standard 3.2 • As part of the Community Assessment, the organization **collects and includes current data specific to poverty** and its prevalence related to gender, age, and race/ethnicity for their service area(s).

- Standard 3.3 • The organization collects and analyzes both **qualitative and quantitative data** on its **geographic service area(s)** in the Community Assessment.

It is important to connect in the Organizational Standards with the ROMA concepts related to the CNA.

As facilitator, you’ll want to study and connect these in throughout the training and/or CNA process.
We first focus on meeting the organizational standards, but ultimately, we want to meet and exceed the organizational standards. This training facilitates exceeding this category of the standards.
CSBG support makes us unique and gives us an edge because our funding allows us to focus resources on specific needs that we identify.

Because of maximum feasible participation:
- Community Action really does involve and empower low-income community members in this process
- They get to offer ideas on the need and what to do about it.

Not only low-income participation – but w/ tripartite board– get more community sectors
- Give input on assessment
- Involved in planning
- Evaluate how the agency is doing

We actually use this stuff!
- Aren’t making up a strategy that One person thinks is a good idea
- We target the need with our strategies and services

We do it every 3 Years (standard 3.1)
- Not out-of-date!
- Have fingers on the pulse of the community
- Your agency will know what they need and want

You are experts on poverty in your community
What a Needs Assessment Can Do

- Create a detailed picture of the need
- Add data to support or challenge your personal beliefs and experience
- Guide development of organizational strategy to address the needs

What Can a CNA do for you?

Your Agency will have a detailed picture of the need (for you and to share)
- Know the family needs in local community
- Collected state statistics
- Talked to partners
- Utilized Surveys, Statistics, Interviews, Focus Groups

You have data to back up what you know from your experience (analyzed data plus experience for knowledge)
- Like in ROMA, talk about “clarifying” the need by going directly to the source

You have data to guide strategy
- What will your plan be to address the needs in the Assessment?
  - Target it at the right problem
  - With efficient use of resources
- What will you evaluate yourself against?

The point with this slide is to begin this discussion by helping attendees understand that not only is the CNA a requirement, but that it will help their organization in a number of ways.
CNA guides Short Term and Long Term Plan
- What are Needs
  - Root Causes
  - Resources and Partners Available

What is our long term strategy?

What will we do in next year or two that will help us achieve our long term strategy and address the needs in the community?
Key Assessment Goals

- Assess level of poverty within the whole community.
- Assess how well the needs of low income individuals and families are currently being met – including what assets and resources the community has
- Identify service barriers that limit the effectiveness of the current service network.
- Assess relationships with key partners and stakeholders and identify how to strengthen them
- Build awareness of Community Action and your community agenda
- Develop recommendations that will enhance the community’s ability to address the concerns of low income individuals and families.

Remember what you are trying to do:

- Assess level of Poverty in whole Community
  - Not just current customer base
- Evaluating Whether Needs are being met
  - What resources are needed
- What barriers are getting in the way
  - For families, our agency, the community
- Building Relationships and Grounding Your Strategy in Partnerships
  - Asking for their input now, and coordination later
- Get Your Name Out – here is what we are about
  - Here is our plan and recommendations to address the need
Be Clear on Your Agency’s Goals

• What do you want to get out of this process?
  – Internal
  – External

• How are you going to use this data?
  – Strategic Planning
  – Advocacy
  – Fundraising

You’ve got to do it (because it is required) – but what do you want to get out of it. The previous slides had some standard ideas, but thinking through this piece can help create good buy-in.

Internally:
Maybe you want to get people together from Different Departments to work on the team
Maybe use this as an opportunity to give new responsibilities to some staff
Want this to be an assessment (and evaluation) of whether your agency with its current strategies and services are meeting the need

External Benefits:
Get in touch with partners, look for more opportunities to collaborate
Trying to set yourself up as expert on poverty (adding data to your experience)

Hold your agency accountable to the needs that you identify
- Use this for strategic planning – how can we meet the need
- For advocacy and fundraising – what resources or changes need to happen in order to meet the need

Facilitator Option: At this time you could engage participants in a discussion about what they want their goals to be for the CNA process in their agency.
To create the most comprehensive array of data, you want it to be multi-level and multi-sourced. Listed are various types of data you will want to ensure you have. We will get more into this later.

Customer Satisfaction data will provide an insight to agency level needs -- about agency strengths (what customers feel went well), weaknesses (what customers had issues with), or what agency needs to do better (could be something going well that could be expanded or something not going well that needs to be changed).

You can find out what service sites are perceived to be easy to access or difficult to access. You can find out how effective your service times are (do you need evening or weekend hours?)
These are the 5 steps we will be learning about and walking through throughout this workshop.

**PLAN**

**COLLECT QUANTITATIVE DATA** – this includes data on resources/assets, agency data and maybe even the numerical products of surveys

**COLLECT QUALITATIVE DATA** – this includes input from a variety of segments of the community and the agency and also includes Customer Satisfaction as a distinct kind of qualitative data

**ANALYZE DATA**

**REPORT**
Preparing and Defining the Scope
Getting involved those that need to be on board
Setting your goals
- How and when you are going to get them done
- Plan for how to stay on track

Setting yourself up for success
Engage the Board

Help Board Members understand their role in the process. They will:
• Establish the scope of the assessment
• Review the data collection plan
• Approve a proposed budget for the assessment process
• Assist in outreach to
  – key stakeholders and partners
  – policy makers and media
  – broader community

Steps that could be taken to engage the board:
Inform the board of the need to conduct a community needs assessment
Solicit board volunteers to serve on community needs assessment workgroup (consider strengths and connections of board members)
Ensure appropriate board members participate in the planning meetings
Ensure the board provides input on the scope of process and information to be collected
Interview board members as part of qualitative data collection

Facilitator Option: Engage in a discussion about how best to engage the board throughout the CNA.
This is a good time to ask attendees who has been involved in the CNA at their organization in the past. And if it was just one person – brainstorming together that if they could include as diverse of a group as possible – which staff perspectives, competencies, departments, and levels within the organization would they want? And which kind of partners outside the organization should have a role?
What Will the Work Group Do?

The work group will:

- Define the community
- Clarify:
  - What data will be needed
  - Who/what the sources of data will be
  - How the data will be collected
- This group sets direction and provides oversight and feedback throughout the assessment process.
- Facilitates linkages with community leaders and organizations.
- Is deeply involved in the analysis of the data.
- Provides long-term support for follow-up and implementation of recommendations.
- Develops a recommended budget
Who should be on the Assessment Work Group?

Identify who will be included in the Assessment Work Group

• Board Members
  – Is there a committee of the board formed?
  – Are just a few members of the board asked to participate in this group?

• Staff
  – Leadership team or upper management
  – Planners or Grant Writers
  – Direct service staff
  – Others

• From outside the agency?
  – Customers
  – Partners
  – Other stakeholders

Based on this information, who will you include in your work group? This exercise and discussion could be used to actually set up the work group for your agency CNA, if that hasn’t been done already. Or, it could be used to help the work group understand why they are there, if they have already been selected.
Data Collection Plan

When developing the plan, it is a good idea to brainstorm with your team:

1. What issues or domains will you assess?
2. What are the different sources you will use to get a variety of type and level of data?
3. What data collection method you will utilize for each?
4. How will you identify resources and assets?

**Activity:** Utilizing the Data Collection Matrix, identify the points on the slide. Encourage the participants to think specifically for a well-laid plan.

**Handout** can include samples and the matrix
Develop Task List

- Review budget and resources for the assessment process
- Define CAA staff and/or consultant roles
- Recruit partners and participants who will provide input
- Choose and finalize data tools

Having a task list ahead of time can help the work group stay on track and ensure nothing is forgotten as the work begins and gets hectic.

If using this as a facilitative guide to complete the CNA, you could take the time here to develop the task list for your current CNA.

Using a past task lists and information from this workshop so far, identify which steps you would need to take first. If you have a large group present, split them up into teams to brainstorm and develop the list around these four areas. For example, Fiscal and Resource Development staff could group together to determine budget. Program leads and management could group together to determine staff or consultant roles. Any outreach workers, front-line staff, or those most involved in knowing who is in the community would group together to discuss partners and sources of input. You may have already completed bullet four in the previous step.
Develop a Timeline

Having a timeline can help ensure you’ve thought through other agency events or processes that are occurring and could interfere with (or enhance) the CNA process. It also helps the agency stay on track and plan ahead.

If using this as a facilitative guide to complete the CNA, you could take the time here to develop the timeline for your current CNA. Be sure to have the agency calendar available, including other deadlines, events, grant cycles, and processes that occur throughout the year. Avoid major event times or stressful periods if possible and capitalize on when you might already have groups together to gather qualitative data.

**SAMPLE Timeline**
Starting in January, establishing the committee
March Planning, developing forms, community outreach
  March –April Collecting Data (quantitative data, surveying, interviews, forums, focus groups)
  April - May Analyzing Data
May Preparing Report, considering communication plan
June Present Report to Board for discussion and approval, establish monitoring schedule
June – July distribute report as per communication plan
Recruit Volunteers & Partners

- Non-Profits
- City or County Community Development Depts
- Head Start Parents
- Chamber of Commerce, Lion’s Club & Rotary
- Other service providers
- Educational Partners
- Community foundations
- Hospital systems
- Private sector
- Faith-based organizations

Pulling from Page 6 of CNA Guide (NASCSP), you could engage in the following process or discussion around the community volunteers and partners...

- Identify and contact partner organizations and volunteers
- Determine what part of the CNA they can assist with
- Determine recruitment plan (how, who will do it, when it will be done by)
- Provide timeline to staff, volunteers and partners

Questions to consider might include – who else might want access to the data that you are collecting? Who else might have data to offer to your process? Who are those “connectors” in your community that can make sure you talk to the right people and access the right data/resources?
Other Tips in Planning for Data Collection

- Use a three year time frame if possible to allow for identification of trends
- Sequence quantitative and qualitative methods (e.g. follow up surveys with focus groups)
- Pair data collection methods with types of stakeholders and data collection needs (e.g. surveys for customers; key informant interviews for partners)
- Consider connections to the strategic planning process

- This is a long process that is meant to create a comprehensive assessment. With the three year time frame, it allows you create a realistic timeline, sequence the data collection process, and make comparisons to the last assessment.
- Starting with the quantitative data – the “what” will help you get at the scope of the need. Then you can get more details about “why” and “how much” by collecting qualitative data to fill in the gaps.
- It’s important to figure out who can give you different types of information that you need, and then the best way to get that information from them. For example, an elected official can talk about community level needs and the causes behind needs and would be better suited to share this via an interview than a multiple choice survey.
- Think ahead to any data that would be especially helpful for the strategic planning process – or making extra notes so that when you get to that, this data is usable.
What Has Happened Before?

• What challenges have you faced in this stage?
• What has worked well in setting up process?
• How has planning process gone – one person? Plan as you go?
• How much time does this take?

This is an opportunity to give attendees time to evaluate their last process based on what they have just learned – to share any challenges and get peer support.

Think about the last time that you have done your CNA. Or about how this normally goes for you

What has worked?
What do you want to improve upon?
• Decide what quantitative data is needed
  – Community Commons
  – US Census
  – Local
  – Agency
  – Surveys

Remember you are looking for a complete profile that will include both the needs and the resources that are available.
Now we’re moving into talking about the actual collection of data.

Quantitative data confirms or challenges our “feelings” or “beliefs” about the situation in our community.

**Background on the tool if needed:**
So, we’re looking at statistics across areas of demographics, economics, and social trends. This can be very time consuming. There are a lot of great data sources out there, but deciding which ones to use and pulling the information you need and compiling it can be a headache. Our solution to this has been a web-based data tool. This tool was created in 2009 to help CAAs save time and gather the comprehensive data in one location. All data sets used are trustworthy sources, such as census data and other valid, reliable data sets. Initially, this was created in partnership with the CSBG office in Missouri as the primary funder. In order to create the tool, the Partnership contracted with CARES at the University of Missouri, who hosts the site and houses many layers the data. Since then, other states, as well as the National Community Action Partnership has created web tools (Pennsylvania, New York, and the Community Action Partnership). These can be state-specific or on a national level like the community action partnership’s tool.

To access: [https://cap.engagementnetwork.org/](https://cap.engagementnetwork.org/)
Statistical Data

1. Learning to use the CNA Web Tool in the Engagement Network Hub
2. Name 5 conditions of poverty found in your service area data

This is to be accompanied by a demonstration of how to use and read reports and maps from the hub: [https://cap.engagementnetwork.org/](https://cap.engagementnetwork.org/)

**Activity:** How to identify conditions found in the data. Use your own service area and real data. If participants are able to have their own computers to follow along and learn by doing – that is ideal.

The demo could include:

- 101 (Registration, Joining the Hub, Pulling the Report)
- Attendees practice pulling a report in their service area
- Demo Examples of Analysis and Map Creation
- 201 (Going into Map Room, Vulnerable Populations and Location Footprint)
- Attendees practice mapping on laptop

Remember – you want to create a profile of both needs and resources.
There are lots of ways to get statistics. The US Census Department publishes all its data so it can be used to create a profile of your community. You can find out how many people own their homes versus those who rent, how many families have one (or two) parents in a household with children ... and many more statistics.

But sometimes that is hard to navigate these numbers. A CNA online tool was created to help make access to the data more user friendly. It is possible to download charts, graphs and maps (and other visualization tools) that will help you share the data with your Assessment Team.

If you find that the majority of people with low income are found in the north west section of your service area, you would want to work on getting your services out there – so they can be easily accessible to the people in need. If there is limited transportation, you would not want to locate your main office or your primary service sites in places where access is difficult.

If you find areas where there are no low cost grocery stores or stores where fresh produce is available, that may prompt a community level strategy to be established.

User Guides and Videos for additional training on how to use the CNA Online Tool in the CAP Engagement Network are available: https://cap.engagementnetwork.org/
On the left is an example of a zip code map for one service area in Texas.

This prompted a discussion between the local agency and the state CSBG office about geographical barriers (a 7,192 ft high mountain in the middle of the city; an army base that has few highways that allow people to cut through; and a major Interstate 10 that cuts through the county) and how these helped identify the best placement of service sites. In one case, it was identified that one of the areas did not have accurate census data because of the remoteness of the area.

This kind of discussion shows how statistical data can be useful to an agency.

Charts can also help to present the data – here is a trend line (showing poverty over a 50 year period) and a graph of different occupations in the area.
To make the data useful, it must be analyzed in some fashion -- turning it into information.

You will want to know how different data points interconnect – for example, as you may suspect, the data may show that areas where the adults have limited education are those of high poverty.

Some health indicators -- like low birth weight, instances of asthma, use of the emergency room for health care -- can also be mapped to coincide with particular neighborhoods or areas. For instance there is a special table creator using American Housing Survey (AHS) data to create custom tables to find out how many families with children ages 5 – 17 have asthma in a low income community – as compared with in a higher income community.

How do housing patterns differ in low income and middle income communities? Home ownership? Absentee landlords?

Your Assessment Plan will help you identify what data you want to collect to answer your questions about the needs in your community. What needs are reflected for each domain (from the service list in the National TOC)?

To help you “make meaning” from the data, you will need some additional types of data.
Agency data includes some important kinds of statistics. Such as how many people are being served (and how many of specific population groups) – how many services they are given – the locations of the services – how many people achieved outcomes?

Some states have a statewide management information system for the agencies to track agency data and report on NPIs... others have various. However it is done in your state or agency, this is an important set of data to examine and not forget. You’ll want to pull your agency’s numbers and consider – Who? What demographics? What programs are being utilized and by who? This can help fill in the gaps.

Then, this data should be compared with the quantitative data that has been collected, which is moving into the analysis piece of community needs assessments.
• Decide what qualitative data is needed
  – Interviews
  – Focus Groups
  – Forums
  – Open Ended Survey Questions

Collect Qualitative Data
So, you’ve collected your statistical data and used that to confirm. Now, you collect qualitative data to explore. This is going to include narrative, themes, perceptions... As well as available community resources, threatened resources, unmet community needs and current barriers that clients might have to accessing services.

Qualitative data can be looked at in two categories – external and internal. External includes..... Internal includes.... And we’ll briefly cover both.

Consider both needs and resources.
It is not just enough to sample “a lot of people” but to make sure that you are getting responses that represent all sections of your community.
Note to facilitator: there needs to be input from current and former clients on both needs and satisfaction with services.

In this slide we are talking about getting qualitative data from clients about their needs, what they see as needs in the community (from their unique perspective) and any other comments about what is available to meet those needs. (This is referenced in organizational standard 1.2)

There are two different org. standards related to customer input.

**Standard 1.2 -- The organization analyzes information collected directly from low-income individuals as part of the community assessment.**

**Standard 1.3 -- The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.**

This is NOT the Customer Satisfaction data required in the organizational standards (1.3). We will come back and talk about Customer Satisfaction in a few slides.
Note Org Standard 2.2 specifies sectors to include (in addition to individuals with low-income).

The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.
Internal Participants

Board Members
• Asking about gaps in services, satisfaction, changes foresee in the future

Staff
• Asking about unmet needs, causes of needs, understanding of barriers, recommendations
• Through meeting, online, may need to be anonymous
Facilitator Option – you could provide this slide as a handout and discuss various do’s and don’ts and how you could improve your CNA surveys based on this.

Make sure that when you are talking about Qualitative Data you are talking about open ended questions. (Note: closed questions are when there is a forced choice or yes/no response only. Open ended questions are about getting thoughtful responses with more information).

Your survey should have as many open ended questions as possible. Some needs assessment surveys typically have closed-ended, relatively narrow questions which are quantitatively scored. The person being surveyed often responds with a numerical rating, rather than with a verbal statement. Such surveys can be very useful; but they usually can’t capture what a person is thinking or feeling. If you just give a list of choices for selection, you will not get much “quality” What you will end up with is a statement like: 40 out of the 60 respondents said that … was their top need. This is really more quantitative data.

Also be sure to focus on questions that get to the NEED(s) people/community has, rather than what services are utilized or needed.
**Activity:** During a training, a facilitator can choose to do one, two, or all of these methods to demonstrate and practice.

- Identify questions ahead of time (*sample 1* or *sample 2* can be used or modified to agency’s needs)
- Determine facilitator and participant(s)
- Have a recorder to take down what is heard

If this is being used as part of the CNA process, this piece could be used to prep and practice before going out and doing the actual interviews, focus groups, and forums.

Additional information and tips on surveys, focus groups, forums, and interviews can be found in the [HANDOUT](#).
Other Agency Level Qualitative Data

“Customer Satisfaction” data is qualitative data that is specifically focused on issues relating to the agency’s provision of services or engagement in strategies. Responses to *open ended prompts* can help you consider…..

- How well were customers satisfied with the services?
- Were there any particular issues that were raised?
- Or Successes that were identified?

Then compare this data with other qualitative data that has been collected.

We are now coming back to Customer Satisfaction – which is an important kind of data to collect and analyze.

It is specifically about what the customers have to say about the service they received from your agency.

*(Refer to Organizational Standard 1.3 cited earlier)*
Remember the Big Picture

- Quantitative data can tell you HOW MANY?
- Qualitative data provides the CONTEXT.

Combine what you know with data and stories to build a complete picture for how you will address the needs.

Don’t lose sight of what you are trying to do
Use what you know to get more data and stories to build picture of poverty

Not starting from scratch – use what you know
- (what the need is, where it is highest, what changes you are seeing in your community)

Statistics are the base layer – aerial view of state and community
Then you talk to people
- Why are the statistics are what they are
- How can our agency be most helpful
In Summary – Data to Collect

• Quantitative
  – Statistics & demographics from:
    • Census
    • Databases
    • Other sector reports

• Qualitative
  – Narratives, explanations, & stories from:
    • Community Forums
    • Surveys
    • Focus Groups
    • Key Informant Interviews

• Agency Data
  – Demographics, outputs, & outcomes from:
    • Agency databases
    • CSBG IS/Annual Report
  – Customer Satisfaction

• Community Assets/Resources
  – Inventory of what is available

• System of Services
  – Gaps, underserved populations, challenges in service integration, etc
Most crucial part of the assessment process
- Analyze
- Rank
- Categorize
- Organize for Report
Remember Why You Started:
Goals of the Assessment

- Assess level of poverty within the whole community.
- Assess how well the needs of low income individuals and families are currently being met – including what assets and resources the community has.
- Identify service barriers that limit the effectiveness of the current service network.
- Assess relationships with key partners and stakeholders and identify how to strengthen them.
- Build awareness of Community Action and your community agenda.
- Develop recommendations that will enhance the community’s ability to address the concerns of low income individuals and families.

This is the same list as identified earlier... Just reiterate as you go into analysis.
Analyze the Collected Data to Identify:

- areas of need
- needs by demographic categories
- geographic areas of need
- gaps in services
- new partners and resources
- root causes of poverty and
- to gather customer, staff, and partner feedback

Looking for areas of need
- Not just 1 person’s answer – but big picture (what and how much)

Analyzing By Demographics
- Who has what needs?

Analyzing by Geography
- Where are the needs – services – barriers

To See Gaps in Services
- Who are we missing and Why

To Know about Partners and Resources
- Areas of Opportunity?

Understand root causes of poverty
- Why needs exist and persist
- How do they intersect with one another
Why Analyze Data?

- **Data** is facts that are observed, measured, collected and aggregated.
- Data only becomes **information** once it has been analyzed in some fashion.
- **Knowledge** (or **insight**) is derived from the interaction of information and experience with a topic.
- Decisions, based on data-based knowledge, produce potential **Actions** to take to improve.

There is a difference between data, information and knowledge.

**Data** is facts that are observed, measured, collected and aggregated.

Data only becomes **information** for **decision making** once it has been analyzed in some fashion.

**Knowledge** is derived from the interaction of **information and experience** with a topic.

Analysis of data stimulates decision making for **Actions** to improve.

(Once actions are taken, more questions may arise leading to a need for further data collection)

This produces a continuous cycle of improvement
- Actions produce questions – explore answers --- apply knowledge to make well informed decisions
Organize the Data

<table>
<thead>
<tr>
<th>Domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
</tr>
<tr>
<td>Education and Cognitive Development</td>
</tr>
<tr>
<td>Infrastructure /Income/Asset Building</td>
</tr>
<tr>
<td>Housing</td>
</tr>
<tr>
<td>Health and Social/Behavioral Development</td>
</tr>
<tr>
<td>Civic Engagement and Community Involvement</td>
</tr>
</tbody>
</table>

Associate Community Commons and CSBG Act Domains to the new Annual Report Domains
Aggregate by Domains

- Collected qualitative and quantitative data for each domain
- Each domain will have information about:
  - Demographic data (age, race/ethnicity, gender)
  - Geographic data (distribution of need by census tract/zip code, comparison to regional, state, and national data)
  - Trended data over time (data from the last three years is preferable)

For each Domain/Issue
Quantitative AND Qualitative

Want Demographics: Who has the need?
Geography: Where is the need?
Trends: Have things changed?
Analysis by Domain

– Identify the needs for your domain (using all sources)
– Note differences based on age, gender, race/ethnicity for each need where available
– Identify potential barriers and causes
  • (that were mentioned by the group and also from your knowledge and experience)
– Identify assets/partners/opportunities/recommendations for this domain
  • (that were mentioned by the group and also from your knowledge and experience)

Analysis takes it deeper and this is one way to analyze by domain.

If you are using this to guide your analysis of your CNA in real time, you can use the following process to analyze by domain:
• Organize data from various sources (quantitative, focus groups, surveys, interviews, etc)
• Identify common themes that fall within the domains you selected during your data collection planning (you could use colored dots or underline/highlight in different colors to pull out the data for each domain)
• For quicker processing purposes, you could split the group up into small teams around the domains based on their expertise
• Begin to analyze using bullets 2, 3, 4 on the slide and the techniques in later slides (ask, count, compare, trends)
Other Categories

- Locations (neighborhoods, sections of the service area by rural or urban, etc.)
- Other ...

You may want to aggregate some data by other categories that are useful to you!

See Analysis Worksheet HANDOUT
Analysis Techniques

After you have aggregated the data (sorted into meaningful categories) then you can:
  • Count
  • Compare
  • Examine Trends

Use Tools for Visualization
  • Mapping
  • Charts & Dials

Remember that you have created questions that you wanted the Assessment Process to answer. Get those questions out now and see if the data can help you to answer them.

Several, simple analysis techniques can be used. Counting, comparison and examining trends over time are also techniques to use.

Many times visualization of data is helpful as well, especially for those who process information visually. This increases the understanding of the data.
One Technique Is To Count

- How many responded in a certain way?
- How many identified a similar need?
- How many of a certain characteristic?
- How many in a certain geographical area?
Compare

- Data from year to year (looking at prior years).
- Your community with national trends.
- Assessment of needs that were done by other groups.
- Differences that may be seen within groups or between groups.
- Data from other providers or other programs.

**Bullet four:** Example could be a difference in needs of families with young children vs. families with senior citizens (older adults).
Collecting information and attempting to spot a pattern, or trend, in the information is useful to see what has been happening over the past five years. Think about what your “trends” would look like over time.

- Trend analysis together with annual or point in time data provides both a short and long term perspective of what is happening in your community.
- Is the situation getting worse? Getting better? Staying the same?
- Trend analysis provides evidence to inform your decision making.
Using Trend Data

• Analyze the trend you have seen in the past few years.
  – Did the number of people in need of a particular thing remain the same over the past few years or are there annual fluctuations?
  – If there are differences? What caused them? (changes in resources, changes in circumstances in the community, new population in need)
  – How stable is the population? If there is a lot of movement, can that help to explain any changes in the trend?
Breaking Down Need by Level

• Need Domain: Employment
• Level:
  – Clients lack skills to obtain living wage jobs (Family)
  – Community lacks living wage job opportunities (Community)
  – Agency lacks resources to work with job training program participants (Agency)

We know how to think about levels of need.
So that we can target our services

All of the data we collected on employment.
Look at what people said about why it is an issue – to come up with the level
Creating Need Statements and Assigning Level of Need

• Family, Agency, or Community?
  – For each need identified, write as a need statement and decide if it is primarily a family, agency, or community need.

• Write F, A, or C by each need listed on flip chart.

Activity: Practice (or actually create them for your CNA) Need Statements. Be specific to what the need is and whether it is family, agency, or community. You may have to refer back to raw data to determine the specifics and the level.

This is a very important step. Writing the needs in specific need statements with the level of need can ensure planning is effective and efficient. Please avoid using domain names or simply “affordable childcare” as a need.

A need statement describes what is lacking or not present that should be to achieve the mission and vision of the agency. Need statements also should not describe an action, such as – “the community needs to increase affordable childcare”. Instead, it would be, “The community lacks affordable childcare options.” In addition is it just affordable? Or is it about safety? Is it about the location of the centers? Be specific and refer back to data to determine.
What Is Important?

Of course, all of the issues you have identified are important and have an effect on poverty and the community -- but they all may not fall within the scope of your mission.

The act of “prioritizing” can:
- determine which issues to address,
- decide if you want to focus on one issue with various approaches or
- allow others to address an issue

Once it’s been analyzed the agency has to decide what they will focus on – because although community action attempts to be all things to all people, we can’t do it all.

So – which to address? How comprehensively to address? Or whether another entity in the area is already doing this well.

The items you prioritize should be consistent with your mission statement.

Prioritization can help:
- Determine which issues to address (which are most important to your mission)
- Decide whether to address one issue more comprehensively (which may help to solve other issues)
- Or allow others to address an issue (which is outside your direct mission)
Establishing Priorities

- Prioritization can help the agency focus on areas for new funding, trying new strategies, developing more partnerships, integrating services and creating change.
- After prioritizing, the agency can then move on to determine goals, objectives and action steps for their strategic plan.
**Prioritizing Needs**

**Prioritization**
- Using feasibility, importance, and analysis, participate in a *nominal group process*...

**Activity**: Using the data collected and the analysis, prioritize the data. Each person gets 3 sticker dots. Take 5 minutes and individually prioritize using methods learned. Place dots next to needs on flip charts when ready.
• Consider what format is needed for the Assessment report
  - Reports to meet state or funder requirements
  - Report that classifies needs by domains and national Community Action goals

• Develop a plan for Communication
  - Present to Board
  - Publicize and Distribute

Prepare and Communicate the Report
Causes and Conditions of Poverty:
Crux of Who We Are

• We are expected to be the experts on poverty
• What you see everyday: Conditions
• WHY: Causes
  – Why certain demographics experience need
  – Why certain geographies experience need
  – Why issues influence each other
  – Why there are barriers to success
  – Why the “war” on poverty isn’t over

This should be reflected and articulated in the final report. More on causes vs conditions below to help participants understand...

Knowing causes and conditions makes you an expert on poverty

You know the conditions of poverty
- This is why people seek services
- This is a picture of what they are experiencing
- This speaks to The state of poverty in your area

The Causes of Poverty or an opportunity to talk about why
- Why certain people experience certain issues
  - (Age, Race, Gender)
- Why people in certain neighborhoods experience certain issues
- Why transportation impacts employment which impacts child hunger
- Why individuals feel like they keep hitting a wall

It is important for attendees to see the difference between causes and conditions and think through how they can use their experience to add in narrative to their final report that explains the numbers, or why a certain number of people said that transportation was a problem. The idea is that this report should be helpful for those that don’t understand poverty or their community – and by explaining about the context of their community and why certain needs exist (and how poverty is complex) they are continuing to establish their agency as community experts and align their strategic plan with their specific community and its needs.
Format for Reporting

• Outline the report in a way that will meet the agency's overall needs and will address specific needs of various funders.

• Identify the “sections” of the report:
  – By domains
  – By geographical areas of the “community”
  – By ???
For each domain/topic area (employment, nutrition, transportation), there should be an explanation of who has the need, where the need is greatest, if this need is different, and based on experience (and data) what are some reasons/causes about why this is the case.
Sample Sentences to Get Started

- My community includes the following demographics...
- My community has important resources that help families reach self-sufficiency such as...
- My community needs the following resources to help families reach self-sufficiency...
- Families in my community need the following support if they are to reach self-sufficiency...
- Potential partners for my agency include the following organizations that provide specific services to revitalize our community and assist families as they move toward self-sufficiency...
Utilizing the Assessment & Sharing with the Board and others

For this segment, you can refer to and distribute this handout.
Best Practices in Board Acceptance

• Deeper discussion/presentation with Program Committee of the Board
• Receive report to review before the meeting
• Pay attention to the key findings section
• Share big analysis findings that will help members obtain information they need
  – to “fully participate in the development, planning, implementation, and evaluation of the program to serve low-income communities” (IM 82)
• Required: Vote to accept and record in minutes (Standard 3.5)

Take it to your board

One option is to bring it to your program committee or similar entity first for a deeper discussion.
- The team would break down for them:
  - the highest needs/biggest issues
  - If needs have changed since the last assessment (by geography, demographics, or priority)
  - And even getting into some recommendations from this team

Make sure that the Board receives the report for the meeting where they will vote to accept it (so they can ask any questions they have, make any observations of their own)

Point them to the key findings section – this is where the key points you want them to know are located for easy access

This assessment is key to the Board being able to successfully perform their duty. They use this assessment to create the strategic plan and evaluate whether the services and strategies being implemented are meeting the identified needs.

Required by Standard 3.5 - They must vote to accept the assessment and have that recorded in the board minutes.
Utilize Findings in Strategic Planning

- Remember those prioritized needs?
- Remember the recommendations the team made considering prioritization and partners?
- Remember the discussion on causes and the desire to get at the root issues?
- Be Accountable to that – put in Strategic Plan
  - Short Term and Long Term Goals and Objectives
  - What direction do you need to go?
  - What issues are you going to take on?

Make sure you use it. Your agency did a lot of work.

- This team has created a list of Prioritized Needs
- This team of poverty experts has offered recommendations based on the assessment
- This team had a conversation about the causes and underlying issues/reasons behind many of the needs, and these are what the strategies should be seeking to impact

Make Goals to Address those Needs
- Objectives to get you there

This assessment should guide the direction of your agency – and some pieces of it may be a new direction, but it is based in assessment data
Now you cannot take on every need identified, that is what the prioritization process is for – and in the strategic planning process you will need to make decisions based on the need, the assessment of resources, and your agency’s mission
Your Board Should Know

• How demographics in service area have changed
• What the biggest needs are
• What your customers and community think works best to address their needs
• What gaps in services exist
• What your team recommends moving forward

In general – this is used for your Board’s elevator speech

- Who exactly are you trying to help
- What are the biggest needs
- How your strategy came from the ground up
- What the gaps are – how you are going to address
Encourage Your Board to Share Findings

- Raise Awareness of Poverty
  - We are needed in this community
- Raise Awareness of Agency
  - Analysis of need and what you will do about it are great PR
- Build Partnerships
  - Bring knowledge and experience grounded in data to the table
- Fundraise
  - We understand the need, we have a strategic plan to address it
- Advocate
  - Raise awareness about reality of poverty; the need to make change

Your Board Members are ambassadors for your Agency
They can share your hard work.

Raise Awareness about poverty
Raise Awareness about you and what you do
To Advise Community Partnerships and Planning
To Fundraise – this is the need, this is what we will do, and can you help?
To Advocate – the need is still too high! Too many barriers to success! Things need to change!
Build your Message.

Facilitator Note: This could be an activity to actually draft the message you want to share.

Bring it up at **community events**
As **show and tell** in building partners
As **proof to back up advocacy** efforts
As **core of fundraising**

It should succinctly tell people:
Here is what the need is...
Here is what our agency goes and what has worked for us...
Here is how we recommend meeting the need...
We already have these resources... and this is what we still need to make it happen...
Be Creative & Make Findings
Accessible

- Use charts, graphs, and dials from Community Commons for visual appeal
- Create infographics to display the numbers on piktochart.com or word cloud to show the most voiced needs as wordle.net
- Post on agency website and social media

Have Different Versions of Report – One Pagers, Slides
Pull out Graphics
Keep highlighting year-round, not just when you publish the CNA.
Slides 75 – 94 show examples of what, when, how, and where to share. Facilitators can create their own talking points around these and simply show the examples.

Slide 95

How will you share?

As a final activity, you could opt to either discuss this as a group and jot down ideas on a flip chart or make a specific plan of how, where, when, and what you’ll share from your CNA… and what audiences you will share to. This could form into a timeline or action plan. Be sure to consider who in your agency has strengths related to the aspects of sharing the CNA.

And, don’t forget to share with the Partnership and ANCRT!
Questions
Slides 97 through the end share various resources that participants can access with hyperlinks to share post-training. In addition, contact information is included.

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