CSBG Comprehensive Community Needs Assessment Process

Training developed and offered by:
Office of Volunteerism and Community Services
Virginia Department of Social Services
Gail Harris and Matt Fitzgerald
Purpose

To provide a thorough training module on the CSBG Comprehensive Community Needs Assessment (CNA) and to help participants to learn and understand:

- the requirements and importance of the CNA
- how to approach the project and plan for success
- how to form and use a CNA Task Force
- various data collection techniques and best practices
- the importance of data analysis and tools to assist
- ideas for the final report and report distribution
Ground rules
The Results Oriented Management and Accountability Cycle

Assessment
Needs and Resources

Evaluation
Analyze data, compare with benchmarks

Planning
Use assessment data and agency mission statement to identify results, and strategies

Achievement of Results
Observe and report progress

Implementation
Strategies and services
Reminder of the regulations

CSBG Organizational Standards: Community Assessment

Local control of Federal CSBG resources is predicated on regular comprehensive community assessments that take into account the breadth of community needs as well as the partners and resources available in a community to meet these needs. Regular assessment of needs and resources at the community level is the foundation of Community Action and a vital management and leadership tool that is used across the organization and utilized by the community to set the course for both CSBG and all agency resources.
Importance of Community Assessment

- It is important to create a “true picture” of the community or “community profile” – including a comprehensive range of the needs, issues, resources – not just the needs and issues the agency has programs to address.

- Remember, the CAA does not have to address all unmet community needs by itself, but must address the unmet needs and identify how it selected the needs it will address.
Why conduct a needs assessment?

1. Required every 3 years
2. Needs assessment findings are the basis for a good strategic plan
3. Informs community change efforts
## How do they fit together?

<table>
<thead>
<tr>
<th>Community Needs Assessment</th>
<th>Strategic Plan</th>
<th>Community Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every 3 years</td>
<td>Every 5 years</td>
<td>Annual</td>
</tr>
<tr>
<td>Identifies community needs and informs the Strategic Plan</td>
<td>Sets the strategic direction for the agency; establishes priorities and outcomes</td>
<td>Provides the plan to implement programs and approaches needed to meet the strategic goals and address community needs</td>
</tr>
</tbody>
</table>
What are the special CSBG regs related to NA?

- Standards 3.1, 3.2, 3.3, 3.4, 1.1, 1.2, 2.2, 6.4, 2.4 and IM49
Components Referenced in the Regulations

- Participation and information from low income individuals
- Quantitative data: on all localities, trends, comparisons
- Qualitative data: from all localities, trends, comparisons
- Input gathered from key sectors (at least community organizations, faith groups, private sector, public sector and education)
- Customer satisfaction data
- Available resources at agency and in the community; assets.
- Relationship of your CAA's activities to other anti-poverty services
- Data analysis and identification of areas of greatest community needs.
  - Level of needs and changes over time.
  - Gaps.
  - At family, agency and community levels.
- Conditions of poverty: key findings and analysis
- Causes of poverty: key findings and analysis
- Community profiles for each locality
- Key findings section to the final report
Needs assessment models

- Long
- Hard
- Complex
- Not actionable

Easier to understand

Useful in the end. Actionable.
Prepare
- Gain Board input and approval
- Select Assessment Task Force
- Finalize method, scope and timeline

Collect Information
- Secondary data for community profiles
- Primary data from lower income population through face-to-face and survey
- Primary data from other key stakeholders through face-to-face
- Secondary data to flesh out stakeholder input (verify, refute, quantify)

Analyze
- Analyze all data/information
- Prioritize and determine key findings
- Recommend
- Prepare written report

Approve and Share
- Gain Board approval
- Publicize and distribute widely
## Clarify Terms

### Needs Assessment
- Might be focused on a single need area (e.g. child care needs asmt.)
- Might be focused on only one locality or one neighborhood
- Might be only for the agency’s use, not the community’s

### CSBG Comprehensive Community Needs Assessment
- Contains all the information a CAA will need to prepare a new multi-year strategic plan
- Must cover all geographic service areas
- Broad focus: poverty and causes and conditions
- Requires analyzing and synthesizing many kinds of information.
- Done for the community to use as well as the CAA
Clarify Terms: Types of Data

<table>
<thead>
<tr>
<th>Qualitative Data</th>
<th>Quantitative Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview:</strong></td>
<td><strong>Overview:</strong></td>
</tr>
<tr>
<td>• Deals with descriptions.</td>
<td>• Deals with numbers.</td>
</tr>
<tr>
<td>• Data can be observed but not measured.</td>
<td>• Data which can be measured.</td>
</tr>
<tr>
<td>• Colors, textures, smells, tastes, appearance, beauty, etc.</td>
<td>• Length, height, area, volume, weight, speed, time, temperature, humidity, sound levels, cost, members, ages, etc.</td>
</tr>
<tr>
<td>• <em>Qualitative</em> → <em>Quality</em></td>
<td>• <em>Quantitative</em> → <em>Quantity</em></td>
</tr>
</tbody>
</table>

**Example 3:**

**Freshman Class**

**Qualitative data:**
- friendly demeanors
- civic minded
- environmentalists
- positive school spirit

**Quantitative data:**
- 672 students
- 394 girls, 278 boys
- 68% on honor roll
- 150 students accelerated in mathematics

http://regentsprep.org/regents/math/algebra/ad1/qualquant.htm
Clarify Terms

Data Sources

Primary Data Sources

Secondary Data Sources
Primary data

- Facts and figures collected by you for this specific project.
- You are hearing first hand directly from the respondent.
- Can be either quantitative or qualitative in nature.
- Real-time data.
- More work, longer, may be more expensive.

Examples:
- Surveys
- Focus groups
- Key Informant interviews
Secondary data

- Facts and figures collected by someone else.
- You are simply gathering or reporting on what they found.
- Information that already exists
- Data from the past
- Sometimes called ‘desk research’
- Readily available. Inexpensive.

Examples:
- Internet research
- Databases
- Others’ research reports
- Others’ needs assessment reports
Goal: Make the CNA more **useful** in the end

<table>
<thead>
<tr>
<th>TOP NEEDS IN THE HAPPY VALLEY</th>
<th>COMMUNITY ACTION AGENCY SERVICE AREA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Barbour</strong></td>
<td><strong>Greenbrier</strong></td>
</tr>
<tr>
<td>1. Employment</td>
<td>1. Use of Income</td>
</tr>
<tr>
<td>2. Use of Income</td>
<td>2. Employment</td>
</tr>
<tr>
<td>3. Housing</td>
<td>3. Transportation</td>
</tr>
<tr>
<td><strong>Marion</strong></td>
<td><strong>Monongalia</strong></td>
</tr>
<tr>
<td>1. Employment</td>
<td>1. Transportation</td>
</tr>
<tr>
<td>2. Health</td>
<td>2. Use of Income</td>
</tr>
<tr>
<td>3. Education</td>
<td>3. Housing</td>
</tr>
</tbody>
</table>

North Central West Virginia Community Needs Assessment
Prepare
• Gain Board input and approval
• Select Assessment Task Force
• Finalize method, scope and timeline

Collect Information
• Secondary data for community profiles
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Easier to understand
Virginia CSBG; G. Harris and M. Fitzgerald
PREPARE

1. Gain Board input and approval
2. Select Assessment Task Force
3. Finalize method, scope and timeline
CAA Boards (IM 82)

- Sections 676B of the Community Services Block Grant Reauthorization Act of 1998 requires that, as a condition of designation, private nonprofit entities and public organizations administer their CSBG program through tripartite boards that "fully participate in the development, planning, implementation, and evaluation of the program to serve low-income communities."

PREPARE

Your Board must understand:

• why you’re doing a CNA
• its use for you and others
• the timeframe and extensive work
• the methodology, scope, participants
• the board’s responsibilities
PREPARE
Board Input

- Identify key strategic questions and areas to pursue

- Identify the scope of the assessment so it is comprehensive...all areas causing poverty (NOT your current service areas).

**Example**
- Employment
- Health
- Education
- Income/income management
- Housing

**Example**
- Veterans
- Education
- Income
- Nutrition
- Crime

- Employment
- Housing
- Poverty
- Health care
PREPARE

Board Commitment

• It will be a high priority for the Board

• The full Board will actively participate where needed

• Individual Board members: who will be deeply involved?

• Who is the Board champion for this project?
PREPARE

Select Assessment Task Force

Assign a lead staff member to guide the process and support the Assessment Task Force

Appoint assessment team
  Who?
  How many?
  What is the commitment?

Consider:

<table>
<thead>
<tr>
<th>Board members</th>
<th>University</th>
<th>City/county leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local DSS</td>
<td>Nonprofit leaders</td>
<td>United Way</td>
</tr>
<tr>
<td>Local foundations</td>
<td>Parents</td>
<td>Teachers</td>
</tr>
<tr>
<td>Staff</td>
<td>Low income people</td>
<td>?</td>
</tr>
</tbody>
</table>
Other Partners and Resources

Virginia Hospital and Health Care Association: links to all the hospital community health assessments

http://www.theplanningcouncil.org
Group Discussion: CNA Task Force Members
PREPARE

Finalize method, scope and timeline

• Orient the Task Force and plan out the assessment process.

• Be clear on the process and desired outcomes as well as the CSBG requirements

• Clarify the end-in-mind.
  • What will the final report include and look like?
  • What is essential to include?
  • How can you assure it is a useful document to the community and to your CAA?
Things to consider

• What population will you seek for input: currently in poverty? Low income? How inclusive will you try to be?

• How will you handle the various localities in the service area?

• What is your time frame?

• How much work will team members do vs. staff?
Create a data collection plan

<table>
<thead>
<tr>
<th>Secondary sources</th>
<th>Community Forums</th>
<th>Surveys</th>
<th>Focus Groups</th>
<th>Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Census</td>
<td>Part of larger events</td>
<td>Community members</td>
<td>Community leaders</td>
<td></td>
</tr>
<tr>
<td>Local reports</td>
<td></td>
<td>Customers</td>
<td>Funders</td>
<td></td>
</tr>
<tr>
<td>Kids Count</td>
<td></td>
<td>Potential customers</td>
<td>Past customers</td>
<td></td>
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<tr>
<td>Multiple Internet sites</td>
<td></td>
<td>Others</td>
<td>Others</td>
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Virginia CSBG; G. Harris and M. Fitzgerald
Sample Timeline

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<tr>
<td>Hold initial locality council meetings</td>
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<tr>
<td>Continue locality CHA meetings</td>
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<tr>
<td>Collect/present quantitative data</td>
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<tr>
<td>Plan for qualitative research</td>
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<td>Conduct qualitative research</td>
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<td>Determine health priorities</td>
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<tr>
<td>Write community profile(s)</td>
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<tr>
<td>Hold TJHD CHIP meetings</td>
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<tr>
<td>Complete CHIP</td>
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<tr>
<td>Disseminate profile and CHIP</td>
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<td></td>
</tr>
</tbody>
</table>

Excerpt from Thomas Jefferson Health District assessment
Sample work plan

<table>
<thead>
<tr>
<th>Goal #1: Select Venue</th>
<th>Action</th>
<th>Responsible</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify venue options</td>
<td>Sally J.</td>
<td>High</td>
<td>Complete</td>
<td>9/30</td>
<td>10/2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit venues</td>
<td>Sally J.</td>
<td>High</td>
<td>Complete</td>
<td>10/5</td>
<td>10/9</td>
<td></td>
<td>Must send contracts</td>
</tr>
<tr>
<td>Sign contract</td>
<td>Maria S.</td>
<td>High</td>
<td>Complete</td>
<td>10/12</td>
<td>10/12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal #2: Secure Speakers</th>
<th>Action</th>
<th>Responsible</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruit speakers</td>
<td>Sally J.</td>
<td>High</td>
<td>In progress</td>
<td>10/7</td>
<td>10/12</td>
<td></td>
<td>Send to stakeholders</td>
</tr>
<tr>
<td>Speaker bios</td>
<td>Sally J.</td>
<td>Medium</td>
<td>Not started</td>
<td>10/12</td>
<td>10/14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create and send speaker packets</td>
<td>Maria S.</td>
<td>Medium</td>
<td>Not started</td>
<td>10/13</td>
<td>10/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm speakers</td>
<td>Sally J.</td>
<td>High</td>
<td>Not started</td>
<td>10/17</td>
<td>10/18</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal #3: Recruit Sponsors</th>
<th>Action</th>
<th>Responsible</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify sponsors</td>
<td>John S.</td>
<td>High</td>
<td>In progress</td>
<td>10/13</td>
<td>10/19</td>
<td></td>
<td>From sales team</td>
</tr>
<tr>
<td>Write up sponsor agreement</td>
<td>Maria S.</td>
<td>Medium</td>
<td>Not started</td>
<td>10/15</td>
<td>10/16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send emails</td>
<td>John S.</td>
<td>High</td>
<td>In progress</td>
<td>10/19</td>
<td>10/21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make cold calls</td>
<td>John S.</td>
<td>Medium</td>
<td>Not started</td>
<td>10/21</td>
<td>10/23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal #4: Promote event</th>
<th>Action</th>
<th>Responsible</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create banners</td>
<td>Morgan K.</td>
<td>Low</td>
<td>Not started</td>
<td>10/26</td>
<td>10/28</td>
<td></td>
<td>Coffee mugs, totes,</td>
</tr>
<tr>
<td>Order swag</td>
<td>Morgan K.</td>
<td>Low</td>
<td>Not started</td>
<td>10/28</td>
<td>10/28</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create social media strategy</td>
<td>Corrine J.</td>
<td>Low</td>
<td>In progress</td>
<td>10/13</td>
<td>10/26</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make marketing materials</td>
<td>Karen Z.</td>
<td>High</td>
<td>Not started</td>
<td>10/26</td>
<td>10/30</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Lots of samples at: https://www.smartsheet.com
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- Gain Board input and approval
- Select Assessment Task Force
- Finalize method, scope and timeline

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**Approve and Share**
- Gain Board approval
- Publicize and distribute widely
1) Secondary data for community profiles

2) Primary data from lower income population through
   a) face-to-face and
   b) survey

3) Primary data from other key stakeholders through face-to-face

4) Secondary data to flesh out stakeholder input (verify, refute, quantify)
COLLECT INFORMATION

1. Secondary data for community profiles

• Can be done anytime
• Free
• Desk gathering
• Thinking and analyzing are the most important
COLLECT INFORMATION

Secondary data for community profiles

PLAN

• What’s needed to paint a picture of each locality?

• What will be needed for strategic planning?

• Do you need (and can you get) data at lower than a locality-level?

• Current data?


Family, agency and community level data

Quantitative data: on all localities, trends, comparisons

Community profiles for each locality
Beware to too much data!

Page after page of raw data in the report with no analysis or summary is not helpful.

Compare. Look at the trends. Find the nuggets. Summarize.
Secondary Data Collection Plan: example

<table>
<thead>
<tr>
<th>Source</th>
<th>Level (locality or lower?)</th>
<th>For all our localities?</th>
<th>Most recent year. Trend data?</th>
<th>Assigned to:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% enrolled in preschool</td>
<td>Census</td>
<td>City/county</td>
<td>yes</td>
<td>14/15; yes</td>
<td>Joe</td>
</tr>
<tr>
<td>Kindergarteners whose fall PALS-K scores were below kindergarten readiness levels</td>
<td>Kids Count</td>
<td>City/county</td>
<td>yes</td>
<td>15/16; yes</td>
<td>Joe</td>
</tr>
<tr>
<td>3rd grade SOL reading</td>
<td>DOE</td>
<td>City/county</td>
<td>yes</td>
<td>15/16; yes</td>
<td>Joe</td>
</tr>
<tr>
<td>8th grade algebra SOL</td>
<td>DOE</td>
<td>City/county</td>
<td>yes</td>
<td>15/16; yes</td>
<td>Joe</td>
</tr>
<tr>
<td>HS on time graduation rate</td>
<td>DOE</td>
<td>City/county</td>
<td>yes</td>
<td>15/16; only 2 trend years; methodology changed</td>
<td>Joe</td>
</tr>
<tr>
<td>% with HS diplomas</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with some college</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with associate degree</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with bachelors or higher</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teens age 16-19 not in school and not working</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with HS diplomas</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with some college</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with associate degree</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% with bachelors or higher</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teens age 16-19 not in school and not working</td>
<td></td>
<td>City/county</td>
<td>yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Economic</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unemployment rate</td>
<td></td>
<td></td>
<td></td>
<td>Jim</td>
<td></td>
</tr>
<tr>
<td>Median HH income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HH spending &lt; 30% of HH income on housing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**COLLECT INFORMATION**

Secondary data for community profiles

What are reliable sources for the data?

Look for existing local data reports or needs assessments or planning tools.

**Sources**
- Local foundations
- United Ways and Planning Councils
- Universities
- Planning District Commissions
- Nonprofit hospitals
- Health Districts; Community Service Boards
- Where else?
COLLECT INFORMATION

Secondary data for community profiles

http://www.communitycommons.org/groups/community-action-partnership/
COLLECT INFORMATION

Secondary data for community profiles


Easy to use. Has Census tract data on many of the indicators. Good explanations.
COLLECT INFORMATION
Secondary data for community profiles

County Health Rankings


http://www.countyhealthrankings.org/
These documents feature a wealth of information including demographic, economic, and educational data. Each report is automatically updated every time we make changes to our database, so you can be assured they will always be up-to-date.

You can view a community profile by selecting an area below:

- **Virginia Statewide**
- **Counties and Cities:**
  - Emporia city
- **Planning Regions (PRC):**
  - Choose a profile...
- **Workforce Investment Areas (WIA):**
  - Choose a profile...
- **Congressional Districts:**
  - Choose a profile...

The VEC is in the process of updating the congressional district community profiles to reflect the new district geographies. The data that is currently in the congressional district community profiles reflects the geography depicted on the cover of each profile.

Kids Count
http://datacenter.kidscount.org/data#VA/2/0/char/0
COLLECT INFORMATION
Secondary data for community profiles

- Census
- Dept. of Social Services locality data
- Opportunity Index: http://opportunityindex.org/#4.00/40.00/-97.00/
Group Discussion: Community Profiles and Data
COLLECT INFORMATION
Secondary data for community profiles
Gathering input from your stakeholders: what order to use?

- Community Forums
- Surveys
- Focus groups/individual interviews
## Sample planning tool

Sample table with activity decisions for each qualitative data collection method:

<table>
<thead>
<tr>
<th>Activity Decisions</th>
<th>Survey</th>
<th>Interviews</th>
<th>Focus Groups</th>
<th>Forums</th>
</tr>
</thead>
<tbody>
<tr>
<td>How will participants be reached?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who will contact the participants or publicize event?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who will participate?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In which zip codes will the activities be conducted?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Where will the activity be conducted?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When will the activity be conducted?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How will results be recorded &amp; quantified?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What staff and volunteers will be assigned to each activity?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Community meetings

Goals:
1. With a focus on economic status, gain information from the target audience about the major problem areas they are experiencing (conditions of poverty) and some of the reasons why those are occurring (causes).

2. Capture ideas of solutions that emerge.

3. Complete initial group prioritization of the conditions and causes. Note locality differences.

4. Use this information to design a useful, realistic survey to be very broadly distributed and completed by people in/near poverty levels.
COLLECT INFORMATION
Primary data from lower income population through face-to-face

If you only ask something like this:

*What are the biggest problems (needs, conditions) facing you and your family?*

Let’s rank them.

<table>
<thead>
<tr>
<th>Barbour</th>
<th>Greenbrier</th>
<th>Monongalia</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Employment</td>
<td>1. Employment</td>
<td>1. Transportation</td>
</tr>
<tr>
<td>2. Use of Income</td>
<td>2. Employment</td>
<td>2. Use of Income</td>
</tr>
<tr>
<td>3. Housing</td>
<td>3. Transportation</td>
<td>3. Housing</td>
</tr>
</tbody>
</table>
**What are the causes?**

**FIVE WHYs** technique; from Six Sigma

By repeatedly asking the question “Why”, you can peel away the layers of symptoms which can lead to the root cause of a problem.

**How to Complete the 5 Whys**

1. Write down the specific problem.
2. Ask WHY the problem happens and write the answer down below the problem.
3. If the answer you just provided doesn’t identify the root cause of the problem that you wrote down in Step 1, ask WHY again and write that answer down.
4. Loop back to step 3 until the team is in agreement that the problem’s root cause is identified. Again, this may take fewer or more times than five WHYs.

**COLLECT INFORMATION**

Primary data from lower income population through face-to-face
“I’m failing math on my report card”

Why?
A Community Action Guide to Comprehensive Community NA
Example. ‘but why?’ at a community meeting

Determine or state:

1. Biggest problems holding you back from self-sufficiency or from thriving? (ex: lack of decent job; lack of education; poor housing)
   Prioritize them

2. At tables
   • But why?
   • But why?…
   • Map on the wall
   • At end, summarize and use dots to prioritize.

3. “What would you recommend that our community tackle? Put dots on 4

You’ll come out with problem areas (conditions), priorities, many reasons (causes) for each problem, some ideas of solutions, vote on which ones to tackle first…and content for the survey
Group Exercise: Five Whys
What is a community meeting?

• A well-publicized, well-planned public conversation that results in information sharing and development for use in addressing a need/issue in the community.
COLLECT INFORMATION
Primary data through face-to-face (including lower-income population)
COMMUNITY MEETINGS/FORUMS

Why Community Meetings?

- Gives a voice to community members
- Permits increased community participation
- Promote engagement with, and awareness of, agency initiatives
- Relatively quick, fairly inexpensive
- Promote trust and buy-in for eventual solutions
- Direct input from large numbers, diversity
Who do we want at our Community Meetings?

- Open to all, but publicized to ensure those we need
- Diversity, inclusiveness, variety of opinions
- Have some specific targets (related to known issues/needs)
- Community leaders

COLLECT INFORMATION
Primary data through face-to-face (including lower-income population)
COMMUNITY MEETINGS/FORUMS
Keys to conducting effective community meetings (planning)

COLLECT INFORMATION
Primary data through face-to-face (including lower-income population)
COMMUNITY MEETINGS/FORUMS

Ask the why/what/who/how questions
- What information do we need to leave with?
- Who will facilitate?
- What will be the format/flow?
- How will information be collected and by whom?

Envision the interaction
- Plan adequate space and layout for the type of conversation to be had
- Anticipate roles and responses to tough situations/issues
- Secure solid, working recording materials (easels/pads, recorders, sticky notes)
COLLECT INFORMATION

Primary data through face-to-face (including lower-income population)

COMMUNITY MEETINGS/FORUMS

Keys to conducting effective community meetings

Ensuring diversity and quality input

- Promote in as many ways as possible, using partners throughout community
- Conduct in the most accessible place
- Provide for those that will be giving their time (food, child care, transportation)
- Send out information before and after
- Conduct at another function/meeting to improve attendance

Get what you came for

- Keep participants engaged and on-task (focused activities, adequate time to discuss but clear consensus-building)
- Listen and learn, then reflect back
- Always redirect back to the point (finding causes/conditions/needs)

Virginia CSBG; G. Harris and M. Fitzgerald
Group Exercise: Community Meetings

Describe specific characteristics of a GREAT community meeting that you’ve attended.
COLLECT INFORMATION

Primary data collection from lower income population through face-to-face
COLLECT INFORMATION

Primary data from lower income population through a survey

Why?
• Broader response
• Good size samples per locality
• More diverse and representative respondents
• Test out what you heard at the community forums with broader audiences
• Gives you more quantitative data
Please rate each of the issues below by marking one of the boxes.

<table>
<thead>
<tr>
<th></th>
<th>A critical concern</th>
<th>Somewhat of a concern</th>
<th>Not at all a concern</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food costs</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Housing/rent costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increasing income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit card debt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Primary data from lower income population through a survey

**HOUSING**

16. Is Housing an issue for you and/or your family? Yes ___________  No ___________

   If yes, please choose the THREE most important reasons why.
   _____ Affordability of rent/house payments
   _____ Lack of affordable/suitable housing
   _____ Housing size doesn’t meet family needs
   _____ Affordability of needed housing repairs, i.e. roof, foundation, insulation, storm windows, etc.
   _____ Affordability of additional housing costs, i.e. utilities, insurance, deposits
   _____ Credit issues
   _____ Lack of down payment on a house
   _____ Lack of knowledge about buying a home
   _____ Lack of temporary emergency housing
   _____ Lack of funds to ensure energy efficiency of my home
   _____ Unknown
If education is an issue, choose the 3 most important reasons why.

- Lack of vocational training
- Lack of GED/adult education access
- Availability and/or location of classes
- Threats of violence in schools
- Lack of dropout prevention for youth
- Lack of computer access at home
- Lack of transportation(school related)
- Lack of child care (school related)
- Poor communication with teachers/principles
- Unknown

From: North Central West Virginia Community Action Needs Assessment
COLLECT INFORMATION
Primary data from lower income population through face-to-face

Example

- Lack of vocational training
- Lack of GED/Adult Education classes
- Availability and/or location of classes
- Threats of violence in schools
- Lack of dropout prevention for youth
- Lack of computer access at home
- Lack of transportation (school-related)
- Lack of child care (school-related)
- Poor communication with teachers, principals,....
- Unknown

If education is an issue, please choose the THREE most important reasons
Example  Greenbrier County

If education is an issue, please choose the THREE most important reasons why.

- Lack of vocational training: 66.7%
- Lack of GED/Adult Education classes: 33.3%
- Availability and/or location of classes: 0%
- Threats of violence in schools: 0%
- Lack of dropout prevention for youth: 0%
- Lack of computer access at home: 0%
- Lack of transportation (school-related): 0%
- Lack of child care (school-related): 33.3%
- Poor communication with teachers, principals: 33.3%
- Unknown: 0%

From: North Central West Virginia Community Action Needs Assessment
Barbour County

If education is an issue, please choose the THREE most important reasons why.

- Lack of vocational training: 66.7%
- Lack of GED/Adult Education classes: 33.3%
- Threats of violence in schools: 33.3%
- Lack of dropout prevention for youth: 0.0%
- Lack of computer access at home: 0.0%
- Lack of transportation (school-related): 0.0%
- Lack of child care (school-related): 0.0%
- Poor communication with teachers, principals: 0.0%
- Unknown: 0.0%
Example. Survey results: % listing this as an issue for self or family (n=350)

1. Employment 66%
2. Income 64%
3. Housing 52%
4. Child and youth 40%
5. Education 38%
6. Health care 30%
7. Crime 28%
8. Food and nutrition 15%
<table>
<thead>
<tr>
<th></th>
<th>Total (n=350)</th>
<th>Happy County (n=75)</th>
<th>Unhappy County (n=100)</th>
<th>Suffering City (n=175)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>66%</td>
<td>6 (8%)</td>
<td>60 (60%) Rank 3</td>
<td>165 (94%) Rank 1</td>
</tr>
<tr>
<td>Income</td>
<td>64%</td>
<td>40 (53%)</td>
<td>79 (79%) Rank: 1</td>
<td>105 (60%) Rank 2</td>
</tr>
<tr>
<td>Housing</td>
<td>52%</td>
<td>20 (27%)</td>
<td>62 (62%) Rank 2</td>
<td>100 (57%) Rank 3</td>
</tr>
<tr>
<td>Child and youth</td>
<td>40%</td>
<td>75 (100%) Rank: 1</td>
<td>30 (30%)</td>
<td>35 (20%)</td>
</tr>
<tr>
<td>Education</td>
<td>38%</td>
<td>60 (80%) Rank: 3</td>
<td>20 (20%)</td>
<td>53 (30%)</td>
</tr>
<tr>
<td>Health care</td>
<td>30%</td>
<td>20 (27%)</td>
<td>30 (30%)</td>
<td>55 (31%)</td>
</tr>
<tr>
<td>Crime</td>
<td>28%</td>
<td>65 (87%) Rank: 2</td>
<td>30 (30%)</td>
<td>3 (2%)</td>
</tr>
<tr>
<td>Food and nutrition</td>
<td>15%</td>
<td>0</td>
<td>2 (2%)</td>
<td>50 (29%)</td>
</tr>
<tr>
<td>Category</td>
<td>Identified as an issue (n=350)</td>
<td>Why is this an issue? Top 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Employment         | 66%                            | 1. Only low paying jobs available  
2. Don’t have the skills for open positions  
3. No transportation from city to jobs |
| Income             | 64%                            | 1. Can’t pay utilities  
2. Poor credit  
3. No savings |
| Housing            | 52%                            | 1. Rental costs too high: 50% of income  
2. Disrepair and no money to fix house  
3. Public housing neighborhoods are unsafe |
| Child and youth    | 40%                            | 1. Can’t afford child care; no Head Start slots  
2. Not enough affordable after school places  
3. High drop out rate |
| Education          | 38%                            | 1. Lack of computer access at home  
2. Lack of vocational training  
3. Lack of GED classes in evenings/weekends |
COLLECT INFORMATION
Primary data from lower income population through a survey
Survey design and administration

<table>
<thead>
<tr>
<th>Why Survey?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficient way to get large response</td>
<td>Administration can be easier</td>
</tr>
</tbody>
</table>
COLLECT INFORMATION
Primary data from lower income population through a survey
Survey design and administration

Design decision process
Question development
Work out the kinks
Administer the survey
What does it mean?

ALWAYS use a QUALITY, TESTED existing survey if possible
COLLECT INFORMATION

Primary data from lower income population through a survey
Survey design and administration

Design

Why are we doing a survey? If for community needs assessment, questions must truly assess community needs.

Who are we trying to get responses from? Do we have contact info? Is the locality noted?

How will we distribute the survey? Mail, phone, electronic, in-person.

Don’t survey only your clients!

Higher response rate = larger sample
Types of questions matter with medium chosen
COLLECT INFORMATION
Primary data from lower income population through a survey
Survey design and administration

Survey question considerations

Lead with easy, interesting questions. Save tougher for end.

Avoid vague questions. Easy to understand, clear purpose.

Some open-ended, but not too many, and give instructions

Reliability
Produces the same result
Means the same to everyone

Validity
Measures what it’s supposed to measure
COLLECT INFORMATION
Primary data from lower income population through a survey
Survey design and administration

Writing good survey questions

Avoid complex words, acronyms, jargon (ex. Work, not employment)

No double-barreled questions (i.e. How hard is it to find a job and keep a job?)

Don’t write leading/biased questions (i.e. How hard is it to get to work? How satisfied are you with the quality health care in our community?)
COLLECT INFORMATION

Primary data from lower income population through a survey
Survey design and administration

<table>
<thead>
<tr>
<th>Analyzing the results!</th>
<th>Is information complete and valid?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Can data be turned into charts/diagrams/graphs to be better digested?</td>
</tr>
<tr>
<td></td>
<td>Relationships and trends, are any evident in answers?</td>
</tr>
<tr>
<td></td>
<td>Open-ended (look for themes), Closed-ended (Mean/average, median/middle number, mode/most occurring)</td>
</tr>
<tr>
<td></td>
<td>Do these findings relate to other information collected?</td>
</tr>
</tbody>
</table>
Survey Question Exercise!

• Many people attended the important financial management trainings offered this year. Did you attend the financial trainings offered?
  Yes______    No______

• In your opinion, how would you rate the improvement of your speed and accuracy as a result of your skills training?

• People grow up in all different types of families. What type of family did you grow up in?
  ______Mom as single parent ______Dad as a single parent
  ______Both Mom and Dad
Survey Question Exercise!

• How do you feel about this statement: “we should not reduce the cost of health care in our community”;
  Strongly disagree___ Disagree____ Agree___ Strongly Agree______

• Higher than single-family density is acceptable in order to make housing affordable.
  Strongly Disagree  Disagree  Undecided  Agree  Strongly Agree
  1                   2                   3                   4                   5
COLLECT INFORMATION

Primary data collection from lower income population through surveys
COLLECT INFORMATION

Primary data from other key stakeholders through face-to-face interviews or focus groups

Why are these important? What is the purpose?

Who do you want to hear from?

• Government leaders
• Other nonprofit leaders
• Community or other foundation leaders
• Local college
• United Way
• People who have moved to self sufficiency
• Who else?
**COLLECT INFORMATION**

Primary data from other key stakeholders through face to face **FOCUS GROUPS AND KEY INFORMANT INTERVIEWS**

- Specific focus areas, targeted questions, structured

- Not expensive to conduct, mostly time spent planning/implementing

- Expand on answers, get more detail
  - Very rich data
COLLECT INFORMATION
Primary data from other key stakeholders through face to face

- What would you ask?
  - Verify or refute what you’ve heard from low income people
  - What other needs are high on their lists?
  - What other organizations are addressing those needs?
  - What are the current resources available?
  - Are there new resources coming?
  - Where do they perceive gaps?

Available Resources at agency and in the community; assets.

Relationship of your CAA’s activities to other anti-poverty services

Input gathered from key sectors (at least community organizations, faith groups, private sector, public sector and education)
## COLLECT INFORMATION

Primary data from other key stakeholders through face to face

### FOCUS GROUPS

<table>
<thead>
<tr>
<th>PRO</th>
<th>CON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires limited resources (much less than individual surveys or even interviews)</td>
<td>Recruitment/attendance not easy</td>
</tr>
<tr>
<td>Non-verbal feedback can lead direction of conversation</td>
<td>Information collected might be hard to group/categorize</td>
</tr>
<tr>
<td>Can clarify, expand, dig deeper into responses</td>
<td>Group dynamics, strong single voice can dominate</td>
</tr>
<tr>
<td>Reaction/response environment that produces enhanced information and ideas (collaborative thought)</td>
<td>Small size of group, hard to ensure representative views</td>
</tr>
<tr>
<td>New ideas</td>
<td></td>
</tr>
</tbody>
</table>
COLLECT INFORMATION
Primary data from other key stakeholders through face to face FOCUS GROUPS

Keys: **PLAN**

- Facilitated conversation with focused questions, planned well
- Identify the info you MUST come out with
- Develop 5 or so open-ended questions around the info you must have
- “What?” and “How?” questions are better than “why?”
- Keep it simple
- Have some questions to follow up with within each of those 5 areas
COLLECT INFORMATION
Primary data from other key stakeholders through face to face
FOCUS GROUPS

Keys: **RECRUIT**

- Recruit a representative, willing, group
- But not all inclusive!
- May need a few focus groups, but homogenous works well for each individually
- Explore full range of thought within a certain group/population
- Similar recruitment issues to Community Meetings
- Make day/time/location convenient
- Provide transportation/childcare
- Communicate purpose and share info prior, be specific and express need/importance!
- Begin early, have champions that can recruit within target groups
COLLECT INFORMATION
Primary data from other key stakeholders through face to face
FOCUS GROUPS

• Keys: IMPLEMENT/CAPTURE

  • Follow your plan

  • Facilitate/guide towards full answers
    • Engage reluctant talkers, control dominants
    • Repeat key points to emphasize and draw out more
    • Ask questions, but stay neutral and don’t interrupt if possible
    • Don’t force conformity to one view. Discuss.

  • Record in multiple ways
    • Make sure the information is recorded after
    • Add immediate notes in case recordings lack in some areas
## COLLECT INFORMATION

Primary data from other key stakeholders through face to face 
**KEY INFORMANT INTERVIEWS**

<table>
<thead>
<tr>
<th>PRO</th>
<th>Con</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very rich data, target knowledgeable interviewees</td>
<td>More time consuming than focus group</td>
</tr>
<tr>
<td>Can get honest feedback one-on-one</td>
<td>Danger of too much comfort making answers “friendly”, not thoughtful</td>
</tr>
<tr>
<td>Not facilitating any group dynamics, can let the respondent talk</td>
<td>One person’s thoughts don’t represent broad group</td>
</tr>
<tr>
<td>Great way to add context</td>
<td></td>
</tr>
</tbody>
</table>
Key Considerations:

- Planning, question development, probing much like with Focus Groups
  - 5 or so open-ended questions
  - Probe for details
  - Don’t bias or influence with questions
  - Recruitment/selection
COLLECT INFORMATION
Primary data from other key stakeholders through face to face
KEY INFORMANT INTERVIEWS

Key Considerations:

• Recruitment/selection

  • Seeking people with knowledge on areas you need info

  • Could be several individual interviews with target population, then several with partner organizations, then several more with business or other groups

  • Goal is several interviews from each target group, not one from each
Final Key Considerations for both Focus Groups and Interviews:

- There is great opportunity to dig deep and get rich information
- Planning questions thoroughly and giving time for responses a must
- Record everything thoroughly
  - Notes, Recording device
Most Important!

The data collected comes from open-ended conversation, is rich and detailed

- Use a team to analyze (breaks up reading/transcribing)
- Document the process so results can be justified
- Find themes, outline based on themes
- Synthesize team findings into final thoughts
- One person can bring together into a report
COLLECT INFORMATION
Primary data collection from key stakeholders through face to face
For example:

• A key informant tells you that a large new industry is coming that will employ 250 in manufacturing: VERIFY

• Community members: “no buses to west-end businesses in the morning”. Key informant: “yes there are”. : GET THE FACTS

• Community members: “rents have almost doubled in our locality in the past 3 years”: FACT or NOT? How much have rents increased?
COLLECT INFORMATION

- Secondary data for community profiles
- Primary data from lower income population through face-to-face and survey
- Primary data from other key stakeholders through face-to-face
- Secondary data to flesh out stakeholder input
Prepare

- Gain Board input and approval
- Select Assessment Task Force
- Finalize method, scope and timeline

Collect Information

- Secondary data for community profiles
- Primary data from lower income population through face-to-face and survey
- Primary data from other key stakeholders through face-to-face
- Secondary data to flesh out stakeholder input (verify, refute, quantify)

Analyze

- Analyze all data/information
- Prioritize and determine key findings
- Recommend
- Prepare written report

Approve and Share

- Gain Board approval
- Publicize and distribute widely
1. Analyze all data/information
2. Prioritize and determine key findings
3. Recommend
4. Prepare written report
ANALYZE

This is the most critical part of the assessment process.

“It is not about gathering the data but about what we will do with all the data. Once you have gathered all your data, you are going to need to determine **what it all means** and answer these questions: **How can we use it? How can it help us paint our own future?**”

- Community Action Association of Pennsylvania: Community Needs Assessment Toolkit
A CNA is not about presenting the data; it is about sharing the story of what the data is telling you. It is about letting your agency, Board of Directors, state and federal agencies, funders, decision-makers, and the community-at-large get a picture of the needs and strengths of your community, while understanding the critical role your agency plays in it.

CAAP Community Needs Assessment Toolkit
## Top Five Needs in Smiley County

1. Employment

2. Income

3. Housing

4. Child and youth services

5. Education/training: adult

*Not very helpful or actionable*
While analyzing your qualitative data it is important that you continuously ask yourself the following types of questions:

- What patterns and common themes emerge?
- What story are they telling us?
- Are they a root cause or symptom?
- What are the deviations from these patterns?
- What interesting stories emerge from the data? How can these stories help to shed light on the broader issues?
One way: organize your data by focus area

- Find the common themes
- Where does the secondary data align with your stakeholders’ input?
- What issues rose to the top or were most frequently listed? What causes and conditions and solutions did you hear repeated?
EMPLOYMENT: Summary of Input

<table>
<thead>
<tr>
<th>Secondary data tells us:</th>
<th>Target audience findings</th>
<th>Survey findings</th>
<th>Key Informants</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## EMPLOYMENT: Summary of Input

<table>
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<tr>
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<th>Target audience findings</th>
<th>Survey findings</th>
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<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The 2015 unemployment rate is 7.0% compared to Virginia’s 4.4%</td>
<td>• Only low paying jobs available</td>
<td>• Employment is a problem for 62% of survey respondents</td>
<td>• There are jobs but not a match with skills</td>
<td>• The Hospital and Red Cross are willing to explore a CNA training program;</td>
</tr>
<tr>
<td>• 3,326 people work in Sunnyville. The largest fields of work are health care ((823), accommodations &amp; food service; manufacturing and retail.</td>
<td>• Don’t have the skills for open positions</td>
<td>• Lack of affordable child care (52%)</td>
<td>• Need basic computer skills; need health care workers; must work nights and weekends...need child care and transportation;</td>
<td>• The Community College needs workforce development partners for a big grant application for basic computer/technology training program</td>
</tr>
<tr>
<td>• VEC predicts the largest ten year growth to be in Health Care and Social Assistance: a growth of 2,665 jobs or 25.45%</td>
<td>• No transportation from city to jobs</td>
<td>• Lack of evening and weekend child care (33%)</td>
<td>• Companies report applicants are not interview-ready</td>
<td>• The Downtown Churches United have expressed some willingness to let church vans be used for job transportation.</td>
</tr>
<tr>
<td>• 19% of residents have an Associate’s degree or higher compared to 39% in Virginia</td>
<td>• Jobs don’t pay enough; not trained for the jobs that do pay enough</td>
<td>• Buses don’t run where the jobs are (64%)</td>
<td>• new factory is coming in the EAST End but will require at least HS diploma, transportation and some computer skills; 3 shifts;</td>
<td>• etc</td>
</tr>
<tr>
<td>• etc</td>
<td>• Every job requires good computer skills</td>
<td>• Can’t afford a car or car upkeep (48%)</td>
<td>• Low wage jobs go unfilled: how can they be training grounds?</td>
<td>• etc</td>
</tr>
<tr>
<td></td>
<td>• Current training or college programs are not affordable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>etc</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### What themes?
- Virginia CSBG; G. Harris and M. Fitzgerald
<table>
<thead>
<tr>
<th>Secondary data tells us:</th>
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<th>Survey findings</th>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>
Top Five Needs in Smiley County

1. Employment
2. Income
3. Housing
4. Child and youth services
5. Education/training: adult

Not very helpful or actionable
## Top three needs in each of the problem areas

<table>
<thead>
<tr>
<th>Employment</th>
<th>Income</th>
<th>Housing</th>
<th>Child and youth</th>
<th>Education &amp; training (adult)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Only low paying jobs available</td>
<td>1. Can’t pay utilities</td>
<td>1. Rental costs too high: 50% of income</td>
<td>1. Can’t afford child care; no open Head Start slots</td>
<td>1. Lack of computer access at home</td>
</tr>
<tr>
<td>2. Don’t have the skills for open positions (primarily computer skills)</td>
<td>2. Poor</td>
<td>2. Disrepair and are unsafe</td>
<td>2. Lack of vocational training</td>
<td>2. Lack of transportation from city to jobs</td>
</tr>
<tr>
<td>3. No transportation from city to jobs</td>
<td>3. Can’t pay utilities</td>
<td>3. High dropout from school are always full</td>
<td>3. Lack of GED classes in evenings and weekends and bilingual</td>
<td>3. High dropout</td>
</tr>
</tbody>
</table>

Top 3 needs in each focus area: Helpful or not?

But how do we get down to just the top 5 needs?
What is prioritization?

Prioritization is a process whereby an individual or group places a number of items in rank order based on their perceived or measured importance or significance. (CDC)
Grid Analysis or Decision Matrix

*When to use:* Grid analysis is useful when you must or might have to defend your program decisions with ample evidence. It is a great process for when you have many different criteria.

*Limitations:* Compared to the other techniques listed above, grid analysis takes more time and requires a more sophisticated and engaged audience with adequate time available to complete a detailed, thoughtful ranking process.

http://www.ohpe.ca/node/11169
### Criteria

<table>
<thead>
<tr>
<th>Weight</th>
<th>Fit with mandate</th>
<th>Fit with leadership’s agenda</th>
<th>Cost to implement</th>
<th>Expected degree of change</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>B</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>C</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>D</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

### List of needs

<table>
<thead>
<tr>
<th>Weight</th>
<th>Fit with mandate</th>
<th>Fit with leadership’s agenda</th>
<th>Cost to implement</th>
<th>Expected degree of change</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>3 x 5 = 15</td>
<td>1 x 2 = 2</td>
<td>1 x 3 = 3</td>
<td>2 x 4 = 8</td>
<td>28 - winner</td>
</tr>
<tr>
<td>B</td>
<td>2 x 5 = 10</td>
<td>1 x 2 = 2</td>
<td>2 x 3 = 6</td>
<td>1 x 4 = 4</td>
<td>22</td>
</tr>
<tr>
<td>C</td>
<td>1 x 5 = 5</td>
<td>1 x 2 = 2</td>
<td>3 x 3 = 9</td>
<td>1 x 4 = 4</td>
<td>20</td>
</tr>
<tr>
<td>D</td>
<td>1 x 5 = 5</td>
<td>3 x 2 = 6</td>
<td>1 x 3 = 3</td>
<td>3 x 4 = 12</td>
<td>26</td>
</tr>
</tbody>
</table>

Note: 1=poor, 2=ok, 3=good

### Weight

- **A**
- **B**
- **C**
- **D**

### Scoring scale
1. Pick 3 criteria
2. Set weights, if you want
3. Complete ratings
4. Total your scores

<table>
<thead>
<tr>
<th>criteria</th>
<th>weight</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop transportation from city to jobs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase the stock of low cost rentals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase the number of affordable after school programs with transportation from school</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement strategies to reduce the high dropout rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase options for affordable computer access at home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase vocational training opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase GED classes on evenings and weekends</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### What criteria to use? Some ideas.

<table>
<thead>
<tr>
<th>Addresses root causes</th>
<th>Solution could impact multiple problems</th>
<th>The possibility of collaboration or shared workload</th>
<th>The fit of addressing the issue with your organization’s vision and mission.</th>
<th>It is a stated (government, foundation, corporation, etc) priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is feasible to affect this issue.</td>
<td>The frequency of the issue –</td>
<td>The availability of community assets that can be used in this approach</td>
<td>Economic burden on community</td>
<td>There are existing resources and programs to address problem</td>
</tr>
<tr>
<td>Easy, short-term wins</td>
<td>The cost of the issue to the community ($ and time)</td>
<td>The seriousness of the issue – the rate or risk of morbidity and mortality</td>
<td>Magnitude of the problem: How much of a burden is placed on the community, in terms of financial losses, years of potential</td>
<td>Opportunity to intervene at prevention level</td>
</tr>
<tr>
<td>People power, passion are present.</td>
<td>Adaptability……. respond to change</td>
<td>The availability of financial resources needed to address the issue adequately</td>
<td>The possibility of an intervention causing unintended negative consequences.</td>
<td>The compatibility of the approach with efforts already ongoing</td>
</tr>
<tr>
<td>Sustainability – will last</td>
<td>The readiness of the community to recognize and address the issue.</td>
<td>The availability of people with the expertise to carry out the approach or to train others to do so</td>
<td>Research/evidence based; the approach is a best or promising practice tried successfully elsewhere</td>
<td>The long-term impact of the issue.</td>
</tr>
</tbody>
</table>
Group Exercise: Prioritizing needs
## Problem Importance Worksheet

*Complete a separate form for each health issue identified by the CHA Team*

Health Issues: ___________________________________________________________

---

*Check the appropriate box for each item and record the score under subtotal*

<table>
<thead>
<tr>
<th></th>
<th>10 High</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1 Low</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Magnitude/Impact</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>How many people does the problem affect, actually or potentially, directly or indirectly?</td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>What is the cost to society and the economy?</td>
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<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Seriousness of the Consequences</strong></td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>What degree of disability or premature death occurs because of the problem? What are the potential burdens to the community, such as economic or social burdens? What happens if we do not address this problem?</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Feasibility of Correcting</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the problem amenable to intervention (i.e., is the intervention feasible scientifically as well as acceptable to the community?). What technology, knowledge, or resources are necessary to effect a change? Is the problem preventable? Can we affect this problem at the local level?</td>
<td></td>
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</tr>
</tbody>
</table>

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**Problem Importance Index (Sum of Subtotal)**

---

Thomas Jefferson Health District
Example: Top 5 needs for Sunnyvale for 2016-19

**Employment: computer and technology skill develop classes**  
must be bus-line accessible and free or low cost

**Transportation: transportation from the city center to jobs and community college**  
Gathering spots is City Bus Station  
Most needed destinations: (1) far west end corridor,(2) the community college and (3) the hospital  
Must be low cost options; must run until midnight

**Child/youth: more after school slots needed so parents can work**  
Low cost or sliding scale fees  
School pick up especially Fox, Woodville and Bon Air .

**Child/youth: more preschool slots needed**  
Low cost or sliding scale fees  
Especially needed: open from 7:00 a.m. – 7:00 p.m.  
On bus lines

**Education & training: need computer access with internet**  
At-home computers with internet access for homework/training  
More computers at libraries and open later each day
<table>
<thead>
<tr>
<th>Barbour</th>
<th>Greenbrier</th>
<th>Monongalia</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Employment</td>
<td>1. Use of Income</td>
<td>1. Transportation</td>
</tr>
<tr>
<td>2. Use of Income</td>
<td>2. Employment</td>
<td>2. Use of Income</td>
</tr>
<tr>
<td>3. Housing</td>
<td>3. Transportation</td>
<td>3. Housing</td>
</tr>
</tbody>
</table>
Final Report Preparation

How will you structure it to be useful?

By Focus Area

<table>
<thead>
<tr>
<th>I. Employment</th>
<th>II. Health</th>
<th>III. Education</th>
<th>IV. Income</th>
<th>V. Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Key data</td>
<td>I. Key data</td>
<td>I. Key data</td>
<td>I. Key data</td>
<td>I. Key data</td>
</tr>
<tr>
<td>II. Overall findings</td>
<td>II. Overall findings</td>
<td>II. Overall findings</td>
<td>II. Overall findings</td>
<td>II. Overall findings</td>
</tr>
<tr>
<td>III. Locality-specific findings</td>
<td>III. Locality-specific findings</td>
<td>III. Locality-specific findings</td>
<td>III. Locality-specific findings</td>
<td>III. Locality-specific findings</td>
</tr>
<tr>
<td>IV. Appendix: Community Profiles</td>
<td>IV. Appendix: Community Profiles</td>
<td>IV. Appendix: Community Profiles</td>
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<td>IV. Appendix: Community Profiles</td>
</tr>
</tbody>
</table>

By Geographic Area

<table>
<thead>
<tr>
<th>Happy County</th>
<th>Unhappy County</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Community Profile</td>
<td>I. Community Profile</td>
</tr>
<tr>
<td>2. Employment: Key data; Findings</td>
<td>2. Employment: Key data; Findings</td>
</tr>
<tr>
<td>3. Health: key data; findings</td>
<td>3. Health: key data; findings</td>
</tr>
<tr>
<td>4. Education: key data, findings</td>
<td>4. Education: key data, findings</td>
</tr>
<tr>
<td>5. Income: key data, findings</td>
<td>5. Income: key data, findings</td>
</tr>
<tr>
<td>6. Housing: key data, findings</td>
<td>6. Housing: key data, findings</td>
</tr>
</tbody>
</table>

Other
Executive Summary
Key Findings
Methodology
Focus area reports
  I. EMPLOYMENT
     I. Key data
     II. Overall findings
     III. Locality-specific findings
  II. Health
     I. Key data
     II. Overall findings
     III. Locality-specific findings
  III. Etc.

Summary

Appendix
Community Profile for ZZZ County
Community Profile for AAA County

Other Data Summaries
  • Community Meetings
  • Surveys
  • Key informant meetings
Components Referenced in the Regulations

- Participation and information from low income individuals
- Quantitative data: on all localities, trends, comparisons
- Qualitative data: from all localities, trends, comparisons
- Input gathered from key sectors (at least community organizations, faith groups, private sector, public sector and education)
- Customer satisfaction data
- Available Resources at agency and in the community; assets.
- Relationship of your CAA’s activities to other anti-poverty services
- Data analysis and identification of areas of greatest community needs. Level of needs and changes over time. Gaps. At family, agency and community levels.
- Conditions of poverty: key findings and analysis
- Causes of poverty: key findings and analysis; (match conditions and causes)
- Community profiles for each locality
- Key findings section to the final report

Virginia CSBG; G. Harris and M. Fitzgerald
Easier to understand

Prepare
- Gain Board input and approval
- Select Assessment Task Force
- Finalize method, scope and timeline

Collect Information
- Secondary data for community profiles
- Primary data from lower income population through face-to-face and survey
- Primary data from other key stakeholders through face-to-face
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Analyze
- Analyze all data/information
- Prioritize and determine key findings
- Recommend
- Prepare written report

Approve and Share
- Gain Board approval
- Publicize and distribute widely
• Gain Board approval (Standard 3.4 The governing board formally accepts the completed Community Assessment.)

• Share your report and your key findings widely

<table>
<thead>
<tr>
<th>Share with whom?</th>
<th>Share how?</th>
</tr>
</thead>
<tbody>
<tr>
<td>(ex.) Local foundations (x, y, z)</td>
<td>In person meeting from Exec. Director</td>
</tr>
</tbody>
</table>
Final thoughts and questions?
This training curriculum was developed by Gail Harris, Director of the Office on Volunteerism and Community Service at the Virginia Department of Social Services and Matt Fitzgerald, Manager of the Community Services Block Grant Program at the Virginia Department of Social Services.

Permission is granted to use this material with proper attribution to the Office on Volunteerism & Community Services at the Virginia Department of Social Services. The training curriculum should not be materially changed without the permission of the developers.

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Matt Fitzgerald; matt.fitzgerald@dss.virginia.gov

3/8/17