Health Canada   Santé Canada

Community Action Resources
for Inuit, Métis and First Nations

Assessing
Needs

Evaluating

Planning

Toolbox

Making it Happen

Finding Resources

Assessing Needs

Canada

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INTRODUCTION TO THE KIT

When asked "What is a community?", Aboriginal people often answer "A community is a group of people sharing and caring."

This series of manuals is about just that: sharing information and skills to empower people so they can better care for their communities.

Training in community development and program evaluation has been identified by Health Canada and by national Aboriginal organizations as a priority need.

In order to fulfil this need, training workshops were offered between 1993 and 1995 to approximately 300 Aboriginal people across Canada, most of them front-line health workers. The training was based on a generic package of resources on health promotion and community development called the *Community Action Pack*.

Experience and feedback received from the participants during the workshops and after they returned to their communities led to the development of this new kit.

Community Action Resources for Inuit, Métis and First Nations was developed specifically for Aboriginal people, taking into consideration their values, culture and way of life.

This kit is a self-help tool for Aboriginal people who want to get a community development project off the ground.

The series of six manuals contains information, tips, examples and ready-to-use charts that you can copy and use for yourself or to train others in your community. It is intended to be user-friendly, emphasizing questions such as what, why, when and how to accomplish the different steps of a community development project.

Community Action Resources for Inuit, Métis and First Nations uses a holistic approach, taking into consideration community development know-how and context as well as the human aspects that are part of the entire process.
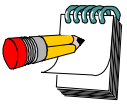
Look for the following symbols.
They will help you apply your skills
and knowledge.

tips

examples

Examples
to help you
understand

exercises

What is a community?

Let's take a moment to think about the word "community". Communities are not just a question of geography. People in a volley-ball league can be a community. A support group can be a community. Members of a church can be a community. Communities are people with something in common, something that is important to them. The members of a community depend on each other as they work together to accomplish challenging tasks. A community can be seen as a group of people:

- living in the same geographical area;

- sharing the same culture;

- with a common interest or concern; or

- with a shared sense of identity.

Add to or comment on this definition. What is a community to you?
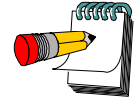
Community development:
making communities healthier

The World Health Organization and Health Canada have defined health as more than the absence of illness and disease. Health is a sense or state of physical, emotional and psychological well-being. Health is an individual or group's ability to reach goals, to satisfy needs, and to cope with or change their environment. In a community context, it is the ability of a community to sustain itself in a caring and fulfilling way. In other words, health means looking after ourselves and others. It is promoted through having access to services appropriate to our needs. It is enhanced by living in a clean environment and by a spirit of community (feeling part of a group of people who care about each other).

This means that groups that are concerned with the kind of housing available in their community, reducing violence, developing the local economy or starting a self-help group for bereaved parents can be seen as improving and promoting the health of their community.

A step-by-step process

Is there a secret to turning a good idea into a successful project? Actually, there is no secret. Groups follow different paths to action, yet experience shows that successful efforts use some "tried and true" steps.

Most groups go through the steps of identifying needs, planning activities, finding volunteers and funding, evaluating and helping people work together through the normal ups and downs of an activity. *Community Action Resources for Inuit, Métis and First Nations* is built around these steps.

Starting a new activity is like planning a trip to a place you have never been.

Just as you need a map for your trip, you also need a map for your community activity. This map will help you figure out where you are, what has been accomplished, and point out what still needs to be done.

The following diagram is your map to the steps for community action that is described in *Community Action Resources for Inuit, Métis and First Nations*. Each circle represents a step in the process of developing an activity.

The interpersonal aspects of community action and the techniques needed to carry out a project, such as taking minutes in meetings, have been gathered together in the "Toolbox". This circle has been placed in the middle of the diagram because the "Toolbox" can be useful in all steps of the process.

ASSESSING
NEEDS

EVALUATING

PLANNING

TOOLBOX

MAKING IT
HAPPEN

FINDING
RESOURCES
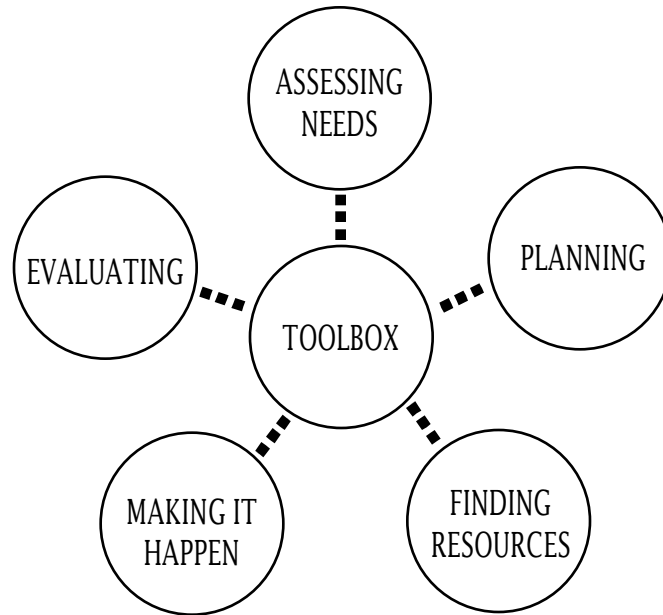
It is important to remember that every group follows its own path, which may be different from the one shown here. There is no absolute "right" way of doing things. You need to go with what works best for you.

The process described in *Community Action Resources for Inuit, Métis and First Nations* is intended to help you plan activities, not to tell you what to do. The diagram is like a map and you can take as many side trips as you like. There are no rules!

I. INTRODUCTION TO ASSESSING NEEDS

Assessing needs, ensuring quality

Assessing needs is a process that is used to discover and understand the needs of members of a group, population or community.

Assessing community development needs makes it possible to get an overview of the community's state of health. It precedes the planning of projects, programs or actions which aim to improve or correct a situation in the community. An effective needs assessment is one way to ensure successful projects!

A step-by-step process

Needs can be assessed through impressions which are based on a general knowledge of the community.

It is better to use a structured process. It helps you understand needs and specify their importance. Lastly, it helps you choose how needs can best be filled. The process that will be described in this kit is flexible and realistic.

Goals

This section will help you to achieve the following goals:

• to become better acquainted with needs assessment; and

• to help you use a structured process for assessing needs.

Objectives

At the end of this section, you should be able to:

• understand the importance of assessing needs and the negative consequences of not doing so;

• use a needs assessment process;

• produce a needs assessment plan before establishing a program for your own community; and

• create and use tools for collecting information.

Approach

A needs assessment is viewed as a process used to validate precise information about a current situation requiring correction. This process allows you to measure the gap between the current situation and what is desired on a short- or medium-term basis.

II. WHAT DOES ASSESSING NEEDS MEAN?

Definition

The term "need" can mean many things. It can be a necessity, such as the need to eat, drink and sleep. It can also be a preference or desire, such as stopping smoking or eliminating the problems of substance abuse among 15- to 20-year-old youth.

In assessing needs, the word "need" refers to the gap between a current situation and the situation you would like to achieve in the near future.

Identifying the current situation	
Identifying the desired situation	Measuring the gap ⬇ NEEDS
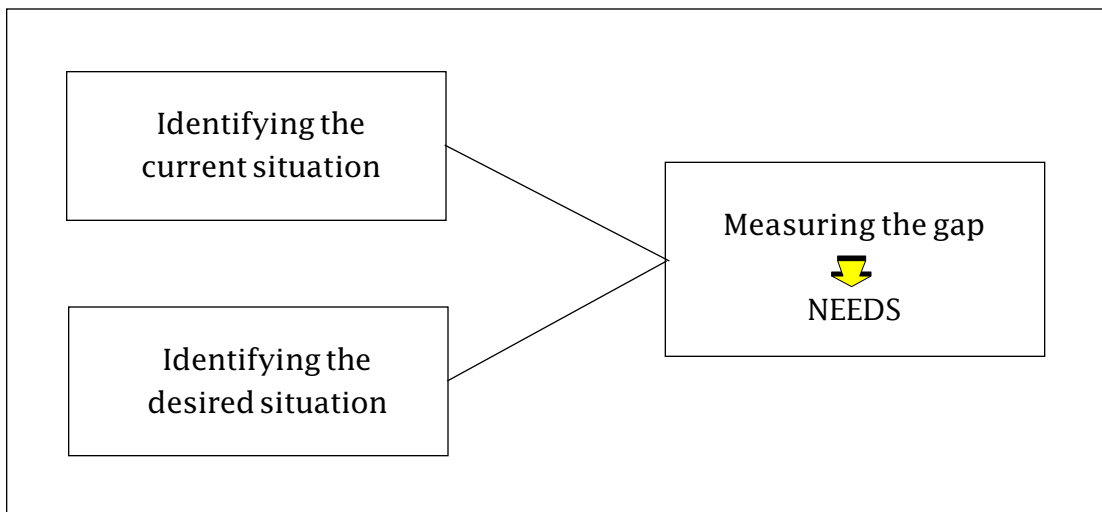
Gathering information

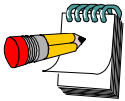The challenge of a needs assessment is identifying the necessary information to describe the current situation. The more you know about the subject of your research, the easier it is to gather information.

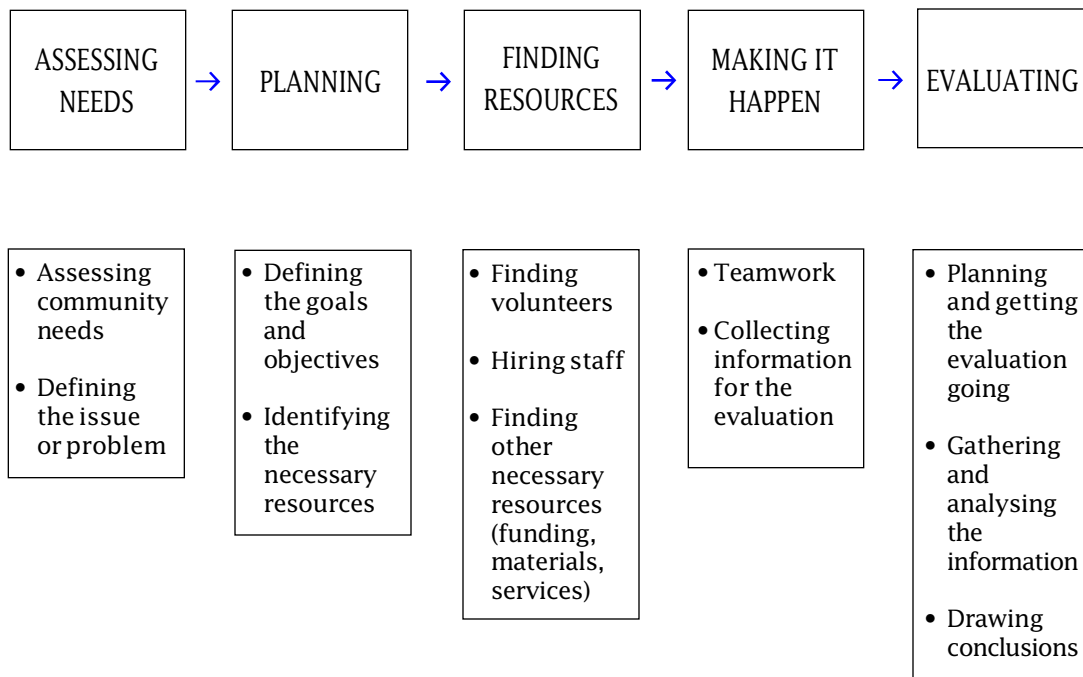To find out how well you know your community, take a few minutes to answer these questions:

- Describe the characteristics of your community (population, number of women, men, youth, languages spoken, employment, etc.).

- What problems (drugs, suicide, school drop-outs, etc.) do you see within your community?

- What information do you need to become more familiar with your community to gain a better understanding of how it functions?

Assessing needs in the life of a program

The following diagram demonstrates the importance of assessing needs. It is the basis for elaborating a program. Identifying needs effectively targets the program's goals and objectives, greatly facilitates planning and contributes to its success.

- Assessing needs is the first step in establishing a program that adequately responds to your community's needs.

- Assessing needs helps you understand the issues that are important in your community and makes project planning easier.

ASSESSING NEEDS	→	PLANNING	→	FINDING RESOURCES	→	MAKING IT HAPPEN	→	EVALUATING

• Assessing community needs • Defining the issue or problem	• Defining the goals and objectives • Identifying the necessary resources	• Finding volunteers • Hiring staff • Finding other necessary resources (funding, materials, services)	• Teamwork • Collecting information for the evaluation	• Planning and getting the evaluation going • Gathering and analysing the information • Drawing conclusions

Assessing needs ensures a smooth transition to the planning stage.

III. WHY DO A NEEDS ASSESSMENT?

Here are five main reasons to do needs assessment research. Needs assessment...

1. Indicates how best to use the resources

All agencies are faced with difficult choices about which services to offer. Information on the needs of your client groups or potential client groups is crucial. It provides a basis for planning your services to meet priority needs.

2. Helps you match services with needs

Before offering a new service, it makes sense to have a clear indication of a need for it.

3. Takes some of the guesswork out of planning

The perception and professional "intuition" about what a particular group needs can be an important source of information that should not be overlooked. However, needs assessment provides additional evidence to confirm the need.

4. Increases accountability

In these times of ever-increasing lack of resources, it is best to ensure that health and social services are based on a needs assessment.

5. Takes the consumer into account

In our enthusiasm for developing new and innovative health and social programs, we often fail to involve the most important person in the process – the consumer. Needs assessment research reveals the needs of current and potential consumers of a service, usually by asking people about their needs. People are more likely to use and benefit from services when they have been involved in the planning process.

IV. WHEN SHOULD NEEDS BE ASSESSED?

When is it appropriate to assess needs?

You should assess needs to validate specific information about a situation you wish to correct. There are several reasons why needs should be assessed.

Here are some examples:

- You run a specialized organization and your clientele is evolving but your services no longer adequately respond to the needs of community members.

- Your organization is receiving more and more requests for services that you do not provide.

- Your organization no longer covers the same geographical sector. The characteristics of the client population are different and you want to be sure that your services respond to their needs.

Examples to help you understand

When is it not appropriate to assess needs?

Assessing needs requires a lot of energy and resources. Before getting into the process, you should make sure it's necessary.

Here are some circumstances where you do not have to assess needs:

- You don't have the human and financial resources to establish a program that can satisfy needs.

- Your organization is not equipped to respond to the needs that may be discovered.

Examples to help you understand
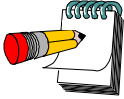
Don't forget a needs assessment is one way to contribute to the success of any project!

Define the health aspect or aspects of your community you would like to correct or improve.

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-

-

-

How many people are affected by this or these problems? Who are they?

-

-

-

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This kit will help you assess the needs or health priorities of your community.

It is important to complete this chart. It will help you determine if carrying out a needs assessment is appropriate.

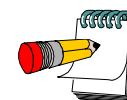---

Based on the health priorities you have selected:

- is it an important problem in your community?

- do you have the necessary resources (human and financial) to implement solutions to the problem once the needs assessment is completed?

In your opinion, does this problem require a needs assessment?

❑   yes   ❑   no

Is your assessment correct? If yes, go on to the next section. If not, identify a new issue that requires a needs assessment.

To get off on the right foot, it is important to:

- determine your commitment;

- choose the population with whom you wish to work;

- learn about your community;

- become acquainted with your community's health problems; and

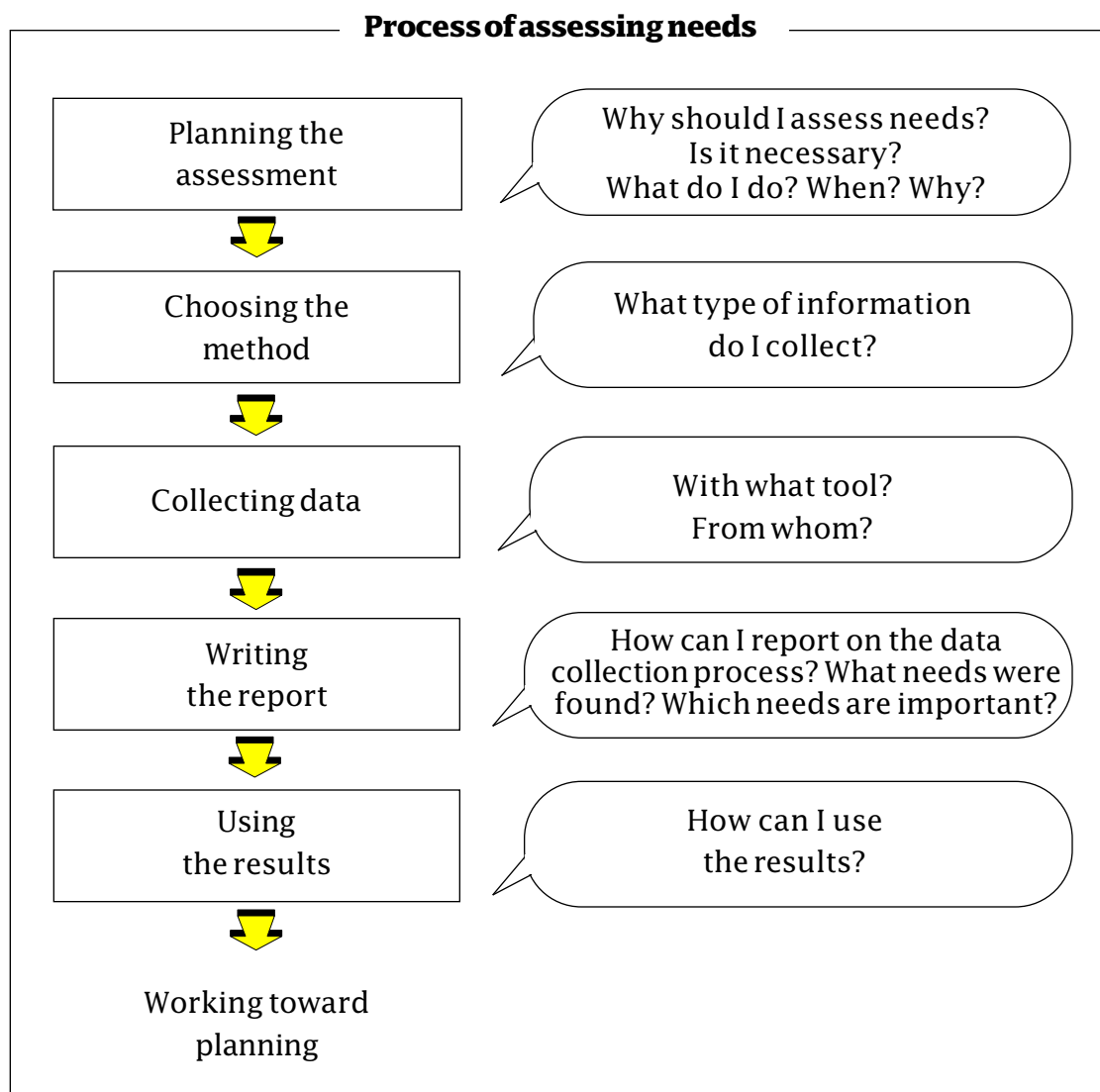- find out how the people in your community feel about health problems.

V. HOW TO COMPLETE A NEEDS ASSESSMENT

Assessing needs is a structured process that is achieved through five distinct steps. Each step is important and plays a role in the success of the process. Each step has specific objectives.

This graph presents these steps and provides a general idea of the tasks that need to be accomplished.

Process of assessing needs

| Planning the assessment |
| Why should I assess needs? Is it necessary? What do I do? When? Why? |

| Choosing the method |
| What type of information do I collect? |

| Collecting data |
| With what tool? From whom? |

| Writing the report |
| How can I report on the data collection process? What needs were found? Which needs are important? |

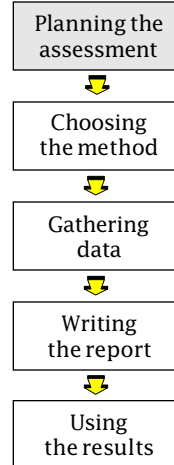| Using the results |
| How can I use the results? |

Working toward planning

Planning a needs assessment

You have some important decisions
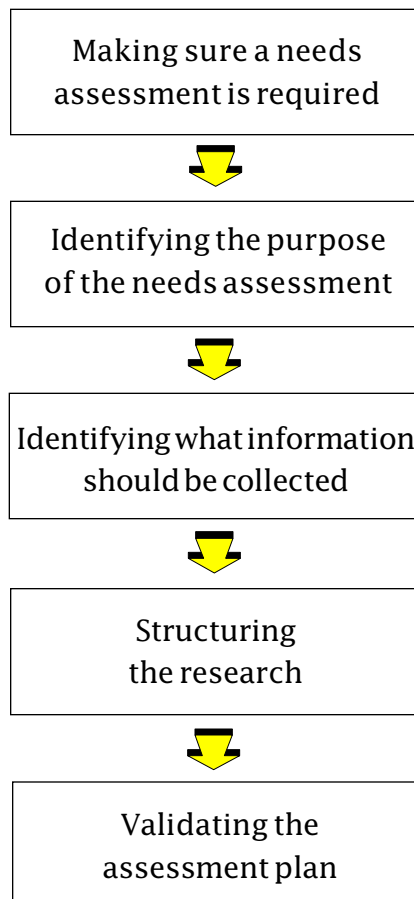to make at this point in the process:

- Should you assess needs?

- What kind of information are
  you researching?

- Where can the information
  be found?

- What is the scope of the
  information you need to gather?

- What is your plan of action?

The answers to these questions
will allow you to plan your research,
identify human and financial
resources, and identify the time
required to assess needs as a whole.

The planning process of needs
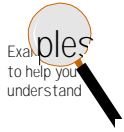assessment is made up of the
following steps:

Planning the
assessment

Choosing
the method

Gathering
data

Writing
the report

Using
the results

Planning of needs assessment

Making sure a needs
assessment is required

Identifying the purpose
of the needs assessment

Identifying what information
should be collected

Structuring
the research

Validating the
assessment plan

The following chart re-examines
each step of the planning process and
describes how to proceed.

Examples
to help you
understand

Planning a needs assessment	
Stages	How to proceed
Making sure a needs assessment is necessary	• Clarify why you are assessing needs. • Clearly identify the information researched. • Make sure the information cannot be obtained through other means. • Identify what you are going to do with the information.
Identifying the purpose of the needs assessment	• Choose a group of five to six people from the population you want to assess to see if the goal of your assessment is worthwhile and easily understood. Note that these exchanges will be very beneficial and will give you a general idea of possible reactions. Don't be surprised if you observe negative reactions; they are completely normal. Some people might feel they are being judged.
Identifying what information should be collected	• Identify what kind of information is being sought. Examples: • For a profile of your community, look for data on age, sex, education, income, etc. • For a better understanding of family trends, look for data on family size and composition, single parents, working mothers, etc.

Examples
to help you
understand

| Stages	How to proceed

Structuring the research	• Identify research characteristics:
	  • type of information sought (economic, political, etc.);
	  • where to find it;
	  • scope of the data collection; and
	  • for which population.
	• Create a detailed action plan that describes:
	  • the schedule;
	  • the resources; and
	  • the costs.

Validating the assessment plan	• Choose a few experts to give advice and comment on the plan that has been described.

Take the necessary time to revise each step of the planning process of a needs assessment.

Refer to issues in your community you wish to improve and plan the first step of the needs assessment.

Answer the following questions for each planning activity:

Planning a needs assessment	
Activities to carry out	Questions to answer
Making sure a needs assessment is required.	• Can you find the information you need through other means?
	• Do you have the required resources?
	• What will you do with the results?
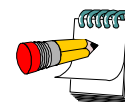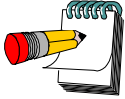
Activities to carry out	Questions to answer
Identifying the purpose of the needs assessment.	Who are the people in your community who could tell you if it is worthwhile to assess needs? How could they help you?
Identifying what information should be collected.	What information on the issues of community health do you want to gather?
Structuring the research.	Describe the specifics of the research you plan to do (Who? What? Where? When? and Why?). Give an overview of what your plan of action might be (schedule, costs, resources, etc.).
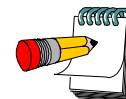
Activities to carry out	Questions to answer
Validating the assessment plan.	What kind of expertise is needed to comment on your action plan (doctor, nurse, police officer, paramedic, etc.)? How can this expertise contribute to the success of your assessment?

The control group you consult to validate why you need to assess needs must reflect the population targeted by the assessment.

The group of experts you consult at the end of the planning step can only give advice. It is up to you to decide whether or not to follow their recommendations.

Choosing your research method

Now that you have described your needs assessment plan, you must start thinking of data collection.

To carry out this important step of assessing needs, you must identify how you can most effectively collect the desired information.
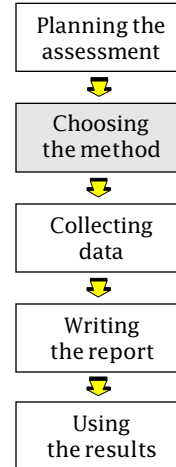
There are four main approaches based on:

1. social indicators;

2. use of services indicators;

3. key informants survey; and

4. community survey.

1. Social indicators

These allow you to gather information on your community's characteristics such as:

*   population distribution by age and sex;

*   number of residents; and

*   types of employment.

Planning the assessment
↓
Choosing the method
↓
Collecting data
↓
Writing the report
↓
Using the results

The information is gathered from existing documents, publications or reports.

This method will provide you with information about the community, not about individuals.

2. Use of services indicators

This method provides you with information from people who use services. The information is collected from agencies and organizations that provide services. Information is gained only on the clientele using services. The needs expressed may not reflect those of the community.

Example: If you want to know about people's hunting habits, you can ask outfitters for information. They will be able to tell you what they sell and to whom.

3. Key informants survey

This method allows you to gather information from the people in your community who know the issues.

It is easy to carry out. You simply have to identify the people and do individual interviews, either in person, by telephone or through a mail-in questionnaire.

You will obtain a lot of information this way. Later, you will be able to analyse it.

Example: To better understand drug addiction in your community, you can interview NNADAP* workers, community nurses and local police officers, etc.

4. Community survey

You could gather information directly from community members. This can be done by:

- getting people together in large groups and having them discuss an issue (forum, meeting); or

- administering a questionnaire, either in person or over the phone.

This second method can be costly in time and energy. However, it does allow you to reach a large portion of the population.

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*   NNADAP: National Native Alcohol and Drugs Addiction Program
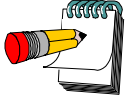
If you had to do a needs assessment on the issue of alcoholism in your community, what strategy would you use to do your research?

To identify your strategy, answer the following questions:

- What characteristics of my community do I need to know (number of individuals from a specific age group or gender)?
- Who are alcoholics (sex, age, occupation)?
- Why do people drink (e.g., unemployment, illness, family problems)?
- What is the viewpoint of those who provide people with alcohol (e.g., shopkeepers, restaurant owners and grocery store owners)?

Now, what strategies do you think would be appropriate?

- reviewing existing documents;
- surveying people with a good grasp of the issue; or
- carrying out surveys in small groups, in large groups, by telephone or by questionnaire.

The following chart will allow you to compare these four research methods. You might have to use several methods to find the information you need.

Four methods of research

Method	Description	Advantages	Disadvantages
Social indicators	• Uses various data (age, sex, number of inhabitants, income, etc.) in the research • Compiles existing information • Allows for comparisons	• Does not require a lot of research experience • Can be based on existing publications and reports • Identifies needs that are not obvious	• Focuses on group and community behaviour rather than individual behaviour
Service use	• Assesses the community's needs regarding agencies and organizations that provide programs and services and those who use the services • Provides two types of information: - needs of the population that uses and requires services; and - the type of services that can meet needs.	• Provides information easily • Provides an inventory of community services	• Provides information only about the clientele that use the service • Need expressed does not necessarily reflect that of the community

Method	Description	Advantages	Disadvantages
Key informants survey	• Is based on the hypothesis that certain people in the community can understand the social and health needs of the community • Uses individual face-to-face interviews, telephone interviews or mail-in questionnaires • Also uses interviews with small groups	• Easy to carry out • Provides a great variety of information	• Information can be based on personal perceptions • Requires that people undergo an interview • Expressed need does not necessarily reflect that of people who do not participate in the meetings • Analysing the information is complex

Community survey	• Used to collect information based on:
	  - facts;
	  - perceptions; and
	  - possible solutions.
		• Must be done by administering a questionnaire through a face to face interview or by telephone
		
		• Collects information directly from the population
		
		• Provides a lot of information
			• Can be costly in time and money
			
			• Requires training to do community surveys and to analyse information collected

Some methodological approaches are more costly in time and money than others. Make sure your choice adequately responds to your expectations and takes your constraints into account.

Collecting data

Collecting data is an important step in assessing needs. There are three ways to collect information: interviews, polls and public forums.

1. Interviews

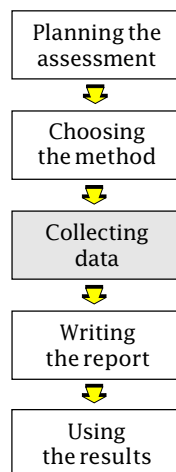The following pages explain the three types of interviews:

a) focus groups
b) individual interviews
c) spontaneous interviews.

a) Focus groups

These interviews are carried out in groups of six to twelve people. The participants are assembled for a specific purpose. They all have something in common (same affiliation, similar opinion on a question, etc.). A discussion leader asks questions, and the answers are recorded and later analysed.

Advantages of this method:

- It is helpful for the participants to listen to other members of the group explain their ideas.

- Information about several people can be collected relatively quickly.

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Planning the
assessment
    ↓
Choosing
the method
    ↓
Collecting
data
    ↓
Writing
the report
    ↓
Using
the results
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- Participants can be asked to be more specific or clarify what they have said.

Disadvantages of this method:

- Group members can wander off subject.

- Group dynamics can influence the results.

- Facilitator must have the necessary training to draw information from the focus group.

- It doesn't allow quantitative data to be collected (numbers, years, etc.).

If you decide to use this method, your chances of getting better results will be increased if you answer the following questions.

- Have you determined the goal of the interview? (On which issue are you gathering views? Do you want the focus group to define the subject matter to be discussed?)

- Have you chosen the members of the focus group? This means assembling six to twelve people who have something in common. Do they view a subject from the same perspective, for example, or do they represent similar organizations?

- Have you reserved a comfortable and convenient location where the participants can sit face to face?

- Have you chosen a facilitator who has a lot of experience with focus groups and will not judge the diverse views expressed?

- Do you have a tape recorder to record the interviews and do you have the group's permission to do so?

- Do you have all other necessary items (for example, a flipchart)?

- Have you reserved 45 to 90 minutes for each interview and told the participants how long it will take?

- Do you intend to send a summary to the participants after the interview?

b) Individual interviews

These are individual conversations, in person or by telephone, that have been scheduled in advance. The interviewer must prepare a list of questions. The advantage of individual interviews is that you can go into greater depth. Throughout the interview, it is important to repeat the answers to important questions using different terms in order to check the ideas, facts and opinions that have been stated.

Advantages of this method:

• You can choose to do either a very structured or a rather unstructured interview.

• It allows you to go into detail on a subject.

• The tone can be much more personal than in the case of a questionnaire, focus group or public forum.

Disadvantages of this method:

• It takes a lot of time.
• Interviewers must be trained for this type of interview.

If you decide to use this method*, you can prepare by answering these questions.

• Have you determined the goal of your interview?

• Have you established the interview form so that it won't take longer than 60 minutes?

• Have you prepared a list of questions?

• Have you reserved a comfortable and suitable location for the interviews that will be carried out face to face?

• Do you intend to keep an account of the interview, or in other words, to take notes or record it?

• Do you intend to follow up the interview with a thank-you letter?

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* You will find more detail on this subject in the "Toolbox" manual, under the headings "Interviews", "Questionnaires" and "Questions".

c) Spontaneous interviews

These can be carried out in groups or individually. They are done in centres where there is a lot of activity and cannot be organized in advance. They should be shorter than organized interviews. This method is less suitable when you want to discuss issues that are controversial or sensitive.

Advantages of this method:

- You do not need to take time to organize the interviews in advance.

- Many people can be interviewed in a short time.

Disadvantages of this method:

- Some people refuse to be interviewed.

If you want to use this method, you will get better results if you answer the following questions.

- Have you determined the goal of the interview?

- Have you made sure the interviews will not be longer than 15 minutes?

- Have you prepared a list of questions?

- Have you found a location that is frequented by the members of the group you want to reach?

- Do you intend to keep an account of the discussion, in other words, do you intend to take notes or to record the discussion?

You will find a guide to preparing interviews in the "Toolbox".

2. Community surveys

You can do a community survey by mail or by telephone. It is not reasonable to survey all the members of a given group. You must nonetheless gather opinions about your issue from a sample of your community's population.

Avoid surveying only the concerned people (for example, athletic trainers about the need for physical education installations).

Surveying is the best technique for proceeding if:

- your questions are very precise;
- you want information about a large group;
- you want to quantify the results; and
- you want information about a sensitive topic and you think the respondents will prefer to remain anonymous.

A survey that is carried out through a written questionnaire can be sent by mail or given directly to the participants. It can be filled out in a group (for example, in the classroom) or individually. Choose a method that will give you the most accurate answers. Make sure the information remains as confidential as possible. It is unlikely, for instance, that the information in a questionnaire on substance abuse, given to students by a teacher and filled out in his or her presence, is accurate.

You will find a guide to writing questionnaires in the "Toolbox".

Advantages of this method:

- It is inexpensive (no interviewers).
- You can ensure confidentiality.
- You can reach groups that are difficult to contact.
- You can ask questions that are controversial or sensitive.

Disadvantages of this method:

- Responses can be delayed due to slow mail service.
- Responses can be distorted since people answer only if they want to.
- In-depth discussion with individuals is not possible.
- Response rates can be low.

If you decide to use this method, these questions will help you get better results.

- Have you determined the goal of your survey?

- Have you chosen the target group that will receive the questionnaire?

- Have you finalized a questionnaire that won't take longer than 20 minutes to complete? The longer the questionnaire, the fewer the people who will fill it out.

- Is your questionnaire easy to use? (For example, you might use a scale of five points and few or no open-ended questions.)

- Have you asked your questions in a way that will not influence the answers? In other words, have you asked them in the most neutral way possible?

- Have you given clear instructions to the respondents? These instructions could include the goal of your survey and the name and telephone number of the resource person who can be contacted for more information.

- Are you able to guarantee that information will remain confidential?

- Do you plan to send a summary of the survey results to all participants?

Content of questionnaires

From the perspective of assessing needs, the questionnaire can help identify the gap between current and desired situations. Take this into account when you formulate your questions. Here are several examples:

Example 1: **Assessing needs**

Current situation	**Desired situation**

Current situation

1. Name of the organization:

2. What is the goal of the organization?

3. What has your organization accomplished in the following fields:

a) Recruiting: Why do people belong to the organization?

b) Activities: Are they of a social or educational nature? Are the committees active?

c) Unique character: Does the organization respond to a special need?

d) Others:

4. What do other people think of your organization?

Desired situation

5. What would you like your organization to accomplish over the next five years?

6. What problems could your organization address in your community?

7. How do you collect the information you need?

8. What will you do with this information?

9. What recommendations would you make? (For example, what do you want to accomplish over the next 12 months?)

Example 2:

Assessing needs

Current situation

Do you agree with the following propositions?

4 = agree strongly
3 = agree
2 = disagree
1 = disagree strongly
0 = don't know

1. My community has a reputation for substance abuse. 4 3 2 1 0

2. The 15- to 30-year-old group has the greatest substance 4 3 2 1 0
    abuse problem.

3. The non-controlled use of medication is part of the 4 3 2 1 0
    community's problem.

Desired situation

Attribute points to reflect the importance you give to each statement.

4 = very important
3 = important
2 = not very important
1 = not important
0 = don't know

1. Something must be done to stop substance abuse in 4 3 2 1 0
    the community.

2. The whole population must become aware of the 4 3 2 1 0
    problem of substance abuse.

3. Financial resources should be used to try to 4 3 2 1 0
    eliminate substance abuse.

There are many other questionnaire models. Yet it is important not to lose
sight of your objective. If you follow the method described in the "Toolbox",
things should go well!

3. Public forums

These are public meetings that can take the following forms:

- Individuals and groups have a specified amount of time (about 20 minutes) to present their views or opinions before an open forum.

- Presentations can be made before a large group, followed by discussions in small groups of the questions raised during the presentation. The small groups then report back to the whole group.

- Less structured forums can take place through hour-long conversations or informal meetings.

Advantages of this method:

- You can gather a great quantity of information and hear from a large number of people in a short time.

- You can reach the whole community.

- You can attract the media's attention (free publicity).

- You can determine the real interest of the community in a specific issue.

Disadvantages of this method:

- The discussion can get off track.

- Some groups may try to use the forum to promote their own interests.

- You cannot go into detail with all participants.

- The participation rate is difficult to predict.

- Public forums provide the setting to gather public opinion, not concrete data/facts.

- Opinions could reflect one or two strong views and not necessarily that of the majority.

If you decide to use this method, you can prepare by answering the following questions. This will increase your chances of success!

- Have you established the forum's goal?

- Have you decided what form the forum will take (group presentation, discussion in small groups, etc.)?

- Have you chosen and invited the individuals and groups interested in presenting their views (personal invitations, mailings to specific organizations, letters to all community members or announcements broadcasted by the local media)?

- Does your invitation indicate that people who wish to present their views must let you know, so you can make room for them on the agenda?

- Does your invitation specify the date, hour, place and goal of the forum?

- Have you publicized the forum (specifying its purpose)?

- Have you established an agenda, specifying how much time there is to discuss each question?

- Have you established an agenda so the public and special interest groups can express themselves freely?

- Have you found a place to hold the forum, as well as the necessary material (flipchart, projector, tape recorder, etc.)?

- Do you plan to distribute the results of the forum to all participants?

- Have you given yourself enough time to organize the forum? (Plan at least four weeks in advance.)

- Have you invited the media?

Choosing a method

You can now choose the best way to gather information for your own needs.

Complete the following chart to help you identify the most appropriate means of gathering information.

- First, identify important considerations by filling out the yes / no in the "Important" column.

- Second, highlight each row for which you have answered " yes" (or circle the three numbers in that row).

- Third, tally the scores of each column, counting only highlighted (or circled) numbers.

- The highest score indicates the most appropriate method of collecting information.
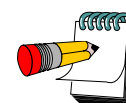
Considerations	Important? Yes/No	Face-to-face interview	Mail-in questionnaire	Telephone survey
Knowing respondents' characteristics		3	2	2
Asking complex questions		3	0	1
Asking open-ended questions		3	1	2
Prioritizing the choice of answers		2	3	1
Surveying on a large scale		0	3	2
Obtaining a high rate of response		3	0	2
Obtaining rapid results		2	0	3
Making sure the appropriate respondent is involved		3	1	2
Limited possibilities for training the interviewer		0	3	1
TOTAL FOR EACH COLUMN				

Population sample

Consulting the entire population would be ideal. However, this may not be practical due to a lack of time, money and human resources, and because the population may be too large. Therefore, a random sample must be selected.

To make up your sample, you could choose people at random. However, chances are that your sample will not be representative of reality.

For a sample to be valid, it must reflect the target population.

Examples to help you understand

If your community is made up of 500 adults consisting of:	Your sample might include:
150 people between 18 and 24 years old	15 people in this age group
200 people between 25 and 44 years old	20 " " " " "
100 people between 45 and 64 years old	10 " " " " "
50 people 65 years old or more	5 " " " " "

Your sample should be in proportion to the population distribution, no matter how many people are selected.

There is no rule as to what size your sample should be but the larger the sample size, the more accurate the results will be. However a sample of 100 people can be as valid as a sample of 1000 people. What is important is the selection criteria, for example:

- respondents' characteristics;
- the accuracy and relevance of the information they have to offer; and
- the connection to the issue.

Here is an example of how to put together a sample:

The issue: The high level of alcoholism among youth between 15 and 20 years of age.

The selection criteria could include:

- youth between 15 and 20 years old;
- fathers of youth in this age group;
- mothers of youth in this age group;
- brothers and sisters of the youth;
- other family members;
- experts in community health;
- school principals;
- teachers; and
- friends of young people between 15 and 20 years old.

A sample based on these criteria would be valid because all of these people can provide relevant information on the issue.

Examples
to help you
understand

You might want to give priority to information provided by specific people. The following table illustrates how you can place more emphasis on certain criteria.

Examples to help you understand
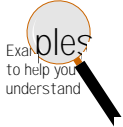
Criteria	Importance*
Youth between 15 and 20 years of age	5
Mother of youth in this age group	4
Father of youth in this age group	4
Brother or sister	3
Other family member	2
Expert in community health	3
Teacher	2
School principal	2
Friend(s)	1
* The highest number indicates the most important criteria.	

Finally, when you are putting together a sample, keep in mind that there is always a margin of error or a risk that results may not be exactly related to the issue. It is a question of mathematics. The risk increases if your sample is not properly formulated or if the difference between the number of people in the population and those in the sample is too large.
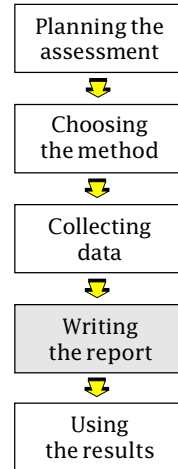
Writing the report

Once you have collected the information, you will have a list of needs expressed by community members. Now you are ready to write a report based on your assessment.

The objective of this step is to:

- describe your process of assessing needs;

- summarize the information collected;

- portray current and desired situations; and

- prioritize needs.

The following chart suggests how to write a needs assessment report.

Planning the
assessment

Choosing
the method

Collecting
data

Writing
the report

Using
the results

Writing the report: how to proceed

Description of the process	• Identify the problem to be assessed. • Describe the community. • Describe the characteristics of the target population. • Identify the chosen method. • Present the tools for collecting information. • Describe the respondents.

Summary of the information	• Present the information according to the specifics of the data collection tool:
	  • If quantitative data were used, describe the use of statistics, charts, graphs.
	  • If qualitative data were used, regroup by themes, objectives, sections, etc.
	  • If closed-ended questions were selected, provide the percentage or number of respondents by choice of response.

Profile of current and desired situation	• Highlight the information obtained by showing conclusions or trends. This means answering the following question: "What characterizes the present and the desired situations?" • Emphasize the gap between current and desired situations.
Prioritizing needs	• Identify criteria for distributing needs in order of priority. • Apply criteria to list of needs.

Here are some tips to help you summarize your results:

- Code and number each piece of information.
- Read all the answers to a given question before reading the answers to the second, third questions, etc.
- Use a blank copy of the questionnaire to count the number of answers.
- Faithfully record the remarks, avoiding interpretation.

Here are some tips for identifying response trends.

- Read all of the answers to a question and use the **key word** technique. In other words, write down the ideas that surface most often in the respondents' remarks.
- Emphasize the answers that have the highest and lowest percentages.
- Highlight the percentage of "don't know" answers.
- Emphasize the connections between questions and answers.
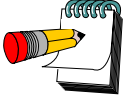
Here are some tips for prioritizing needs.

Take into account the:

- importance (number of respondents) placed on each answer;
- impact of the need on the population and the functioning of the community; and
- possibility of satisfying the need.

Can you imagine the content of your needs assessment report? It would be interesting for you to do a table of contents.

Using the results

Assessing needs does not end with the report. It is important to publicize conclusions and recommendations.

The people who were consulted for the needs assessment would be interested in knowing the results. They might even like to discuss them. You could organize meetings to present your results and share the comments.

The report could also be used to demonstrate the importance of carrying out actions, projects or programs to correct the situation.

Finally, the needs assessment report provides all of the necessary information for you to start planning your community project. You can identify the goals and objectives, and target the clientele whom you wish to address.

Planning the
assessment

Choosing
the method

Collecting
data

Writing
the report

Using
the results
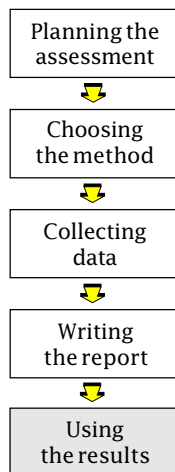
Remember

By assessing needs, you are starting out on the right foot. Identifying needs allows you to specify goals and objectives that:

- determine good planning;

- work toward the desired changes; and

- help choose programs and activities and establish how to carry out an evaluation.