



National Aboriginal Health Organization - Métis Centre
Organisation nationale de la santé autochtone - Centre métis
Mishiwayitay li promyee mood ka weechihikawshoochik pour la sawntee

Needs Assessment Guide for Métis Communities

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Movements and great causes can only advance when they produce leaders of integrity . . . Teaching . . . the value of education and struggle, our programs must always be . . . in close touch with the everyday life of our people . . .

- Jim Brady, Métis Leader (1940)

Acknowledgements

It is a great privilege to be able to assist Métis communities as they become stronger and healthier and we humbly acknowledge that this guide will only help them organize the knowledge and strengths that already exist.

We are grateful for the feedback and assistance from Lois Edge, Linda Sullivan and Michael Fisher of the Métis Centre at the National Aboriginal Health Organization, and to the Métis Centre for its confidence in our ability to create a guiding model.

Our gratitude is also extended to the many Métis community members and Elders who have given us the experience required to produce this document.

Judy Hughes
Karon Shmon

Métis Centre at the National Aboriginal Health Organization (2005).
A Model for Conducting Community Based Needs Assessments in Métis Communities.
Prepared by On Trac Consulting Ltd. Yorkton, SK.

ABOUT THIS MODEL

1.1 Why create a model?

There are a number of models for conducting needs assessments but few that are community-based and designed specifically for Métis communities. Each model or plan has its good points. Whether a model can succeed or not depends on how well it fits the community in which it will be used. Is it designed to take the community values into consideration? Is the community's worldview or way of understanding the world, understood by those designing the needs assessment model? What are the communication strategies and ways to involve community members that will be successful? When these questions are considered, it is apparent that a model specifically designed for use in Métis communities should be developed. It would be wrong to presume that all Métis communities, or Métis within communities, are the same. However, there is some value in looking closely at a model that will work well in a Métis community or assist the community in using some of the strategies based on traditional Métis values.

Traditionally, Métis put the well being of the community before the well being of any individual or smaller group. Our ancestors took pride in sharing resources and ensuring that the variety of talents within the community was brought forward in the best interest of the community. This helped people belong and respected the diversity among our

Responsibility to the people is the central organizing principle of the community.

(Turpel-Lafond 1997)

people. Leadership was shared in that the right person for each job could step forward or be called upon as needed.

Men, women, Elders and children had roles that were different, but necessary to what needed to be done in the community. Sometimes the roles would change and sometimes they were shared. The community members felt they belonged and could contribute. Providing for, and helping others, was highly valued.

With these values in mind, a community-based needs assessment is a natural fit for our Métis communities because it begins in the community, is done by the community, is owned by the community, and improves the community. As a people who value determining our own future, a community-based needs assessment done the right way will be in keeping with our values and desire to direct our own lives.

1.2 What is a Needs Assessment?

A needs assessment involves looking at what is needed or missing, and working together to correct or improve an identified problem or service gap. It could be looking at your home to decide what needs repair or change. It could be looking at your family to decide what is needed to improve communication. A needs assessment done on a community involves looking at the community to decide what is needed to get the community the way people want or need it. Usually this means some improvement to the community. A needs assessment offers a picture of what is happening or needed in a community. It can be done on one idea or on a number of topics that involve improving the community overall.

A needs assessment that is not community-based may be the idea of an outside person or group and be conducted by external persons or groups as well. In this case, decisions on what to assess and how to assess are also made externally. This type of needs assessment can improve the community but could never be called a community-based needs assessment. An example would be for the telephone company to decide it wanted to assess where to provide cell phone coverage next. The company would look at which areas do not have cell phone coverage, ask the communities that don't have it if they want it, and then proceed to make the changes where they are most likely to get more support. Therefore, what to assess, how to assess it and what to do next has all been decided by an outside group.

1.3 Is a Community-Based Needs Assessment Different?

So what kind of needs assessment can be called community-based?

A community-based needs assessment has community participation at every stage. The idea to assess the community is born in the community or is at least adopted at such an early stage the community really feels it is theirs. So even if stakeholders present the idea because they too want the assessment done and can contribute, the idea is borne from the community before proceeding further. In many cases, the community itself identifies something it wants changed or improved and starts talking about how to make it happen. Even this way, to be a community-based needs assessment, other people and stakeholders from the community must be involved early and wherever possible throughout.

There are a number of ways to conduct a community-based needs assessment in Métis communities. The following diagram is based on the Métis flag's infinity symbol, which illustrates the two main groups from which Métis heritage and culture formed, and the formation of a new, strong culture that will go on forever — to infinity.



In this illustration, community is at the centre of everything that is done in a community-based needs assessment. It shows the connection between the two main parts of the needs assessment, the people involved in it and the tasks, or jobs that need to be done.

Over the course of the community-based needs assessment, all of the parts will move around and interact with one another. Sometimes one particular part will be more important than the rest, but all are important for the process and the outcome – to identify what is needed to improve the community. It is not difficult for those with a holistic worldview to see the connection between the heart and the head. It is the connection between our emotions and our intellect.

The Four Worlds International Institute for Human and Community Development supports the view that the type of balance called for in this model is important to all work in communities. A founder of the Institute makes an important observation about the balance required between the heart and the head:

Unto itself the intellect is a sacred gift of the Creator, but equally, without an open, visionary, and creative heart, there is no wisdom. Both the mind and heart are sacred. Both are inseparably connected.

— Phil Lane Jr.

1.4 How are ethics and respect important to this model?

Among Métis traditional values, respect is probably the most important thread running through everything else that is valued. Respectful families and communities thrived and Métis Elders modeled respect in child rearing, family values and community involvement. The concept of ethics was part of the traditional value of respect although the word was never used by our ancestors. Ethical conduct naturally followed from respecting ourselves and others. Ethics involve treating the people, the community and what is being done in a community with respect. This involves doing the community-based needs assessment *with* the community, not *to* it.

To be more specific and to help others see how the traditional value of respect and the modern value of ethics can be understood together, the First Nations Centre at the National Aboriginal Health Organization describes four principles that affirm First Nations' right to self-determination in the area of research. Generally, the same principles are a good fit for Métis communities.

Ownership — First Nations communities have a right to own their cultural knowledge and all information that is produced from this knowledge, the same way that individuals own their personal information.

Control — First Nations, their communities and leaders have the right to control every stage of a research project, from start to finish. This includes the resources involved, the review process, creating the research design, handling the information, and developing new policy based on the research results.

Access — First Nations must have access to information about themselves and their communities without facing any barriers, regardless of where it is held. They must also be able to make decisions concerning who has access to their information and how this access is given.

Possession — While ownership describes the relationship between a people and its information in terms of a right, possession is the physical control over the information. Possession is a way for First Nations to assert their ownership and protect their information. If information is owned by someone but possessed by someone else, there is a risk that the information can be leaked or misused.

NAHO Information Sheet: What is OCAP? 2003

It is important that these principles be used as a means of showing respect for the community. A community-based needs assessment that operates ethically and respectfully, and incorporates the OCAP principles, will make every effort to see that what happens is culturally based, Métis-specific and Métis-owned.

Ownership of, control of, access to and possession of the community-based needs assessment builds in respect and ethics. It also increases community capacity as the community determines how it will identify its needs and draws on its own knowledge and expertise to determine ways to address them. A transparent, or easily visible, process means the community stays involved and informed.

Reminder

Permission for use of information should be discussed and obtained. It is also important to respect the confidentiality and processes for ensuring accuracy.

1.5 Where will this journey take you?

This community-based needs assessment journey is one that can be exciting, challenging, and full of surprises. It will be a learning experience and rewarding all in one trip. The needs assessment process is one of the first legs of the journey. It is not the part that gets you to your final destination but lays the groundwork for the rest of the trip.

You can learn a lot from your Métis ancestors as you prepare for the journey. Métis voyageurs were a bridge between cultures. The voyageurs created a bridge of transportation to get trade goods from one community to another. A more important bridge was the one made between the cultures of the various communities to which they travelled. The health and well-being of the community depended on a group effort. Women, children and Elders would help them prepare and often do the follow-up. Transporting and trading the goods was the voyageurs' job. They needed a crewman who knew the rapids and portages they would encounter. They had to consider many issues: Where were the best places to break for camp? Where were the hostile environments? What kind of timelines were they expected to keep? Who were the key contacts in each community? Were the ways to show respect different from community to community? What could be exchanged so both parties were satisfied? When would the appropriate rest stops need to take place so the crew could function at its best?

The hosts were always happiest when they got what they were expecting or were pleasantly surprised to get more. Overall it was a journey where everyone had a role that contributed to the well-being of the family and community. Beyond the tasks themselves, relationships were made stronger and the Métis culture incorporated the best of all elements. It was strengthened through many ties from one community to the next. This was our ancestors' version of what we now call capacity building. They were building or adding to the capacity of the community and its members to be self-sufficient and ever improving. Community members gained valuable skills that were in turn handed down through the generations. The strong Métis nation that endures today was the ultimate need addressed. With such a legacy left by the voyageurs we can easily agree that the journey was as important as the destination. Everything that took place on the trip added value and shaped our culture.

Your effort to build the capacity within Métis communities is such a journey. It is necessary to be well prepared. The strengths of all citizens can make a contribution. Skills can be learned and a stronger community can emerge. The culture can be renewed and transferred to the next generation. Strong ties can be formed that add to the well-being of the community.

As a first step on the journey, the community-based needs assessment can set the direction for many dreams to be realized.

***I am, and we should all be proud of being Métis,
as we are the progeny of the best of two peoples.***

**The Late Adrian Hope
Métis Leader**

WHAT MAKES A MÉTIS COMMUNITY HEALTHY?

The health of a community depends to a large degree on the health of its individual members. The health of community members depends on how well individuals can take care of themselves, take care of others and take care of the community. A number of ways of looking at this follow and show how the Métis view of health is both unique and similar to other viewpoints.

2.1 How does Métis Traditional Knowledge help us?

Métis traditional knowledge connects us to our roots and is the mainstay of our cultural heritage. Our ancestors' teachers were the Elders and other members of the community who had traditional knowledge in many areas. When they shared the knowledge, it was considered a valuable gift. Recipients knew they had been given something special because the teacher considered them worthy of receiving it. The ongoing oppression of Métis was nearly successful in changing our view of who we acknowledged as teacher and what type of knowledge was valued. Fortunately, our knowledge keepers persevered and we still have a wealth of traditional knowledge to draw upon. We owe a great deal of thanks to the traditional knowledge keepers.

When it comes to Métis health, traditional knowledge and healing practices have always been passed from generation to generation through storytelling, observation and direct experience. Using and understanding traditional medicines and the importance of our connection to the land is founded within Métis culture, language and traditions. Our Elders are respected as our teachers and guides.

NAHO, Métis Centre

2.2 What is the role of Métis Community Knowledge?

Métis community knowledge is the knowledge collectively held by the members of the community. This can include traditional Métis knowledge and everything that is currently known by the community. Not all members will have the same knowledge, but the combination of knowledge held within the community makes it richer than any one individual.

This makes the role of Métis community knowledge one that takes us back to the traditional value of sharing and caring for the community rather than just ourselves. Community knowledge will be forthcoming when the respect and ethics highlighted in the previous section are put into practice. The community owns the knowledge, owns the process by which it is collected, allows all members of the community access to it and controls how it is used. Under these conditions, the role of Métis community knowledge becomes one of leaving a legacy through sharing and applying what they know to make the community better.

2.3 What is holistic health?

If you asked most people “How is your health” they would think you meant their *physical* health. Perhaps others would also include their *emotional* health as they thought of a response. For people with a holistic view of health and well-being, this also includes *intellectual* and *spiritual* health. All four together contribute to our well-being as individuals, as families, as cultures, and as communities. All four contribute to the social health of the community and its members.

Health Canada has identified 12 determinants of health that affect a population’s health and well-being. This population health strategy is holistic in nature because it considers a range of factors to define and determine health.

The determinants from Health Canada are:

1. Income and social status
2. Social support networks
3. Education and literacy
4. Employment/working conditions
5. Social environments
6. Physical environments
7. Personal health practices and coping skills
8. Healthy child development
9. Biology and genetic endowment
10. Health services
11. Gender
12. Culture

Public Health Agency of Canada. Determinants. Available at <http://www.phac-aspc.gc.ca/ph-sp/phdd/determinants/determinants.html#income>. Accessed June 16, 2005.)

While the population health definition and approach works for the most part, it is not necessarily coming from a Métis and First Nations worldview. The Four Worlds International Institute for Human and Community Development has extensive experience working with Métis and First Nations communities. Working hand-in-hand with Elders, the Institute came up with 14 determinants. Spirituality, and cultural integrity and identity are two additional aspects vital to the health and well-being of Aboriginal peoples:

Indigenous cultures throughout the world have always approached health in a holistic way. Holistic approaches to health means that the whole person is considered in any treatment of disease. The inter-relationship of the mental, physical, spiritual, emotional and social aspects of health and well being of individuals and communities are considered in order to treat a person.
Métis Centre @ NAHO

1. Basic physical needs

2. Spirituality and a sense of purpose
3. Life-sustaining values, morals, and ethics
4. Safety and security
5. Adequate income and sustainable economies
6. Adequate power
7. Social justice and equity
8. Cultural integrity and identity
9. Community solidarity and social support
10. Strong families and healthy child development
11. Healthy ecosystem and a sustainable relationship between human beings and the natural world
12. Critical learning opportunities
13. Adequate human services and social safety net
14. Meaningful work and service to others

The Four Worlds International Institute for Human and
Community Development, *Determinants of Health*

It is apparent from comparing the two lists that Métis and First Nations peoples have a more holistic view of health and well-being. It is also apparent that culture and community are very important.

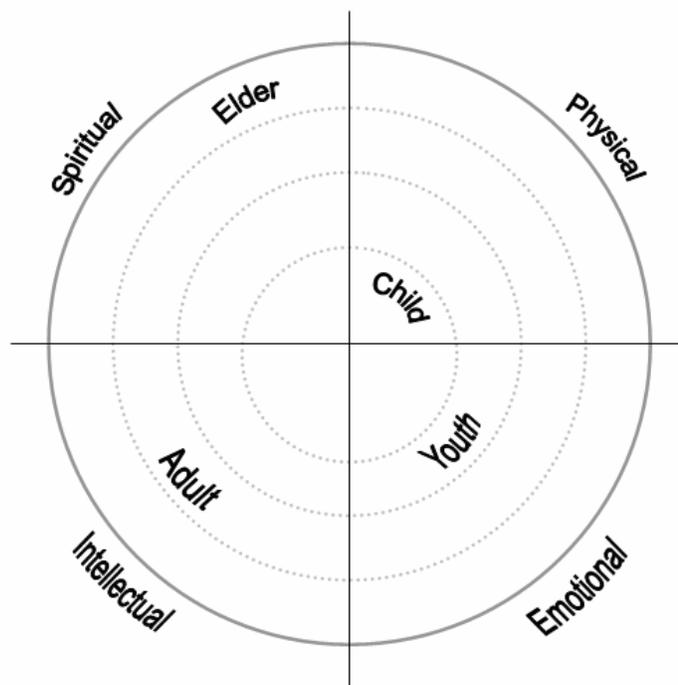
The Métis Centre is dedicated to improving the mental, physical, spiritual, emotional and social health of Métis.

NAHO, Métis Centre

As your community-based needs assessment is being planned and conducted, you may find the next model of health helpful as it allows you to see assets and needs all on one diagram.

For each section, identify what is already in place, what needs to be done better and what needs to change or be added. Do this for each age group: children, youth, adults and Elders. Also consider both males and females.

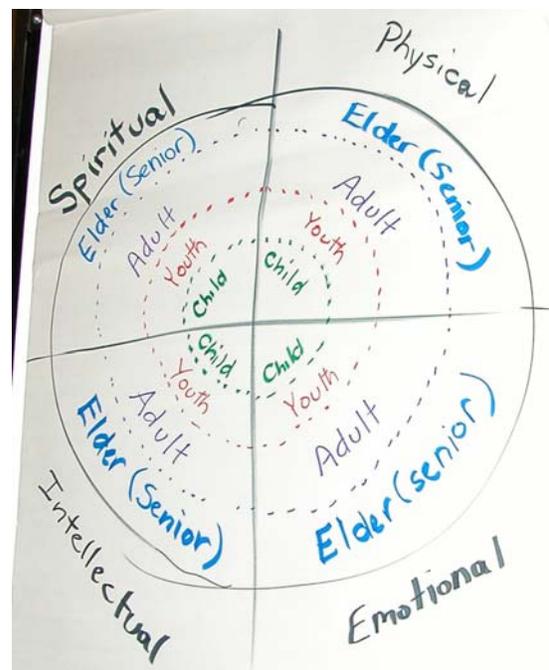
DETERMINANTS OF HEALTH – MEDICINE WHEEL MODEL



© Karon Shmon

The Circle is a non-hierarchical way of coming together for a specific purpose and is based on shared leadership, reliance on Spirit, and shared responsibility for what happens in Circle. Communication in circle is more than a meeting of minds — it is dropping into heart space, connecting with Spirit and meeting one another there.

Christina Baldwin
Calling the Circle



WHY DO A COMMUNITY-BASED NEEDS ASSESSMENT?

3

Sometimes the needs in our communities seem so obvious we wonder why an assessment is necessary to prove something we already know. We have been doing this type of informal needs assessment for years, and many positive outcomes and changes have occurred as a result. Our basic needs, such as food, shelter and clothing are so critical to our well-being that the need is expressed in a noticeable way fairly soon after they are not met. Many communities provide recreation facilities and programs for youth, shelters for women and children and seniors services as a result of the obvious way in which the need for these services has been expressed and without having conducted an assessment beforehand.

However, if your overall goal is to improve the community and to see that the needs are met, then you have to acknowledge that some ways are better than others to make sure the desired outcome is achieved. A community-based needs assessment adds to the credibility and strength of any need you have already identified. It also helps answer the following questions that make the assessment more thorough and encourage support from others:

- How do you know others agree with your assessment of what is needed?
- Are there needs within your community that have yet to be identified?
- How can you gain support within the community for identifying and addressing the needs?
- Who can help with this task?
- How can you use the knowledge and the strengths within the community to support your work?
- How can you get support to address the needs?

3.1 How can you identify issues important to the community?

It could be argued that the most important conversations occur over tea and bannock, or at some other informal gathering where people feel safe and comfortable expressing their thoughts. This will always be a great way to share information and plant the seeds for change necessary to improve our communities. Beyond these informal means, someone must act as the catalyst, or spark, that gets the idea off the ground. In most cases, that person will go to someone they feel is in a position to help achieve this. This momentum builds, person to person, until it is apparent that the issue is important enough to share with a larger group. At this point, a plan can be made to bring people together to further explore the issue, discuss how it can be addressed and organize what to do next.

3.2 What do you hope to accomplish?

The pattern described above illustrates how a community-based needs assessment is usually created from a few good ideas from a small group of people who want to make a positive difference in the community. It is not unusual for the original idea to change as a result of the assessment. When this happens, it often results in an even better idea coming forth. The stakeholders involved must be aware of this and be prepared to accomplish a general goal of improving the community. The general goal can be focused in a specific area, such as recreation, but should have room for some flexibility in the outcomes.

For example, a general goal might be to assess “What recreation opportunities and services are available for families in the community?” The community-based needs assessment process will involve other community members, bring forth a wealth of additional ideas and raise other issues and goals related to family recreation. As a result, the assessment may show that the lack of services is a symptom of some other need. If this need is met, perhaps increased recreation services would be unnecessary.

In a case such as this, you might want to look at whether the community arena is getting its full use or only benefiting a few. Some questions you could ask are: What programs currently exist for each age level and each gender? Is there a Parent-Tot Learn to Skate skate program? Does the school have access to the rink as part of their school physical education program? Is the arena used for hockey, figure skating, lacrosse or broomball? Is it used for other family skating events?

As with the Medicine Wheel Model on page 15, your needs assessment will identify what is already in place, what needs to be done better and what needs to change or be added. This is done for each age group and gender.

Perhaps the community can improve access for everyone, but increasing or improving services still needs a plan. Undertaking a needs assessment will meet both needs. The increase in access to programs may improve recreation services because the recreation providers and youth workers will not be spread so thin if the recreation initiative can meet the needs of some community members.

This could even be flipped around if it were determined that recreation services could be improved if the resources used for recreation were better planned, better coordinated or provided by volunteers. This example shows that a goal might be set at the beginning, but after examining the issue through the community-based needs assessment process, a more pressing need has emerged and sets the group on a new path.

It is also important to be realistic about the time required for the community-based needs assessment. It can take from three to six months to complete. It must also be viewed as a leg of the journey that may be retraced in the future to again reach the goal of community improvement.

A needs assessment will:

1. indicate how to best use the existing resources,
2. take the guess work out of planning,
3. provide evidence of need,
4. increase accountability, and
5. consider the consumer.

Métis Health Policy Forum

If your community receives funding to address the issue, the assessment, may also be a requirement of the funding agencies. The community must be viewed as a dynamic place where people and their needs change, and where other factors impact and change what is needed.

What can be accomplished is an opportunity to consult, compile, and understand how existing programs and services have affected the community and its members, what is needed and ways to improve programs or services so the end result is a healthier community for all.

3.3 What has been done already?

Before beginning your needs assessment, it is important to know about any similar work that has been done before. Find out how it was carried out, and what was accomplished as a result. Is the issue still important to the community? You can find this out by talking to community leaders and those who work in the area identified. As an example, perhaps there has already been an assessment done on recreation services. If so, recreation service providers and youth workers could assist in determining what has been done as well as finding out if there are still unmet needs and what, if any, they may be. It is also a good idea to look through any reports and other documents related to the work.

WHAT STEPS DO YOU TAKE TO GET STARTED?

Preparation and communication are the keys to successful completion of any project. A well-developed plan helps you avoid pitfalls, reduce blind spots, and build capacity and momentum. A good communications strategy informs community members of the initial objectives of the needs assessment, and raises awareness about the importance of participating in the process. Clear and frequent communication is a step that establishes and maintains a positive link with the sponsor group (the group calling for the assessment, and perhaps paying for it) and the working group (the group who will design and oversee the delivery of the assessment).

4.1 What planning process will work well?

Planning is a step-by-step process that lays out much of the groundwork for your activities. Your planning should be an inclusive process that invites people to contribute to the planning, ensures community interaction and keeps everyone informed as the process evolves.

Planning involves setting your mission or purpose; establishing goals; establishing priorities for human and financial resources; and determining the time required for each step of the assessment and how to share the workload. Monitor your plan throughout the process so you have an accurate picture of how well you are achieving your goals. This will enable you to make changes in a timely fashion so the overall goal can still be reached.

The following five steps will help you in planning the process for your community-based needs assessment.

Step 1 – Planning

- Meet with the people who want the assessment done
- Set up a working group of community people
- Develop a work plan and timeline with the working group
- Determine the purpose of the community-based needs assessment: Why do the needs assessment? What issue has been identified?
- What, if anything, has been done on the identified need/issue?

Step 2 – Choosing the Methods and Tools

- Select the most appropriate data collection methods
- Choose the sample, size and participants
- Develop and pre-test the information-gathering tools

Step 3 – Gathering Information

- Identify what information needs to be collected
- Address issues of confidentiality, privacy, what not to collect
- Conduct the assessment with your chosen methods (questionnaires, interviews, community forums, focus groups, etc.)
- Record all the data

Step 4 – Analysis

- Analyze the results
- Interpret the results
- Summarize the results

Ask the following for good planning:

Where do we want to go?

Who are we? What is our potential?

What are our priorities?

How can we achieve our goal?

What resources do we have for use?

What steps should we take?

Are there opportunities to assist us?

What should our work plan look like?

How can we monitor each step?

Have we created an atmosphere of trust and inclusion?

How can we analyze what we find out?

How will we know if we are successful?

Step 5 – Reporting the Results

- Prepare the draft report for review and feedback by the sponsor group
- Write the report(s)
- Present the report(s) to community/stakeholders/funder
- Acknowledge ownership of the data

4.2 How do you find out who is interested in working with you?

Once the planning process begins, it is time to identify specific organizations or individuals who may have an interest in the work being done. Look first to the community where the assessment will take place. Who shares the same concerns? Has anyone volunteered? The work you are about to do needs community support. This may be affected by whether the needs assessment is community-driven or initiated by an external agency from which the community receives essential services.

Circulating an advertisement or poster in the community usually brings people forward.

Where to publicize

Local offices
Community centre
Arena
Stores
Schools
Drop-in centres
Library
Laundromat

How to publicize

Word-of-mouth
Posters
Pamphlets
Public notices
Phone trees
Meetings with local leaders
Service clubs
Agencies
Poster contest

Sometimes there are agencies that will partner with you because you share common goals or responsibilities. They may see this as an opportunity to strengthen their ability to provide services and respond to needs. It is best to seek partnership with an agency with which you already have an established relationship. If these links do not yet exist, it is a great opportunity to start one.

For example, if a health agency wants to assess child hunger needs in the community, a partnership with the school division may help both groups better serve the community.

There could be other individuals or groups who may want to be involved in the needs assessment or could help you identify other stakeholders such as external helping agencies.

What resources are available?

Make a list of all the resources that currently exist in your community. These will include helpful people, groups, agencies and services. A preliminary list may already exist to which you can add human, physical and financial resources. Within the human resources, you will want to include volunteers, paid workers, and those with influence. Physical resources include working and meeting spaces you may want to use.

Financial resources include potential funders and sources of donations. In-kind contributions are those that would cost money but are donated free-of-charge by an individual group or agency that can provide it because they already do something similar. Your meeting rooms, office space, photocopying, materials, computer equipment, snacks and refreshments, mailing, telephones, rentals and travel may be provided by those who cannot give you money but can contribute by providing something else you need.

4.3 What does the Working Group look like?

Working in groups is a good way to solve problems, share work and achieve outcomes. Organize a group in which the strengths of the members complement each other.

Building an effective group takes in the following considerations:

- A small group of four to five members. Identify potential members and ask well in advance of the assessment, if possible.
- Select members from leadership, consumers, service providers (youth, Elders, male and female).
- You may need to include an initial team-building phase to increase the comfort level of the team and to have them establish norms, or ways in which they will operate before they actually start.

4.4 How will the Working Group operate?

People who plan to work together start off by developing a set of ground rules, or norms, for sharing responsibility for achieving the group's goals and objectives.

This includes factors such as when and where to meet, how often, who will lead and take minutes, how the work will be shared, and how decisions will be made.

Sample of skill sets for working group members

- Sensitivity towards literacy in reading and writing English
- Reading skills, writing and people skills
- Prioritizing and following a plan
- Reliable, responsible, accountable
- Principles, ethics, confidentiality

Additional training in these areas may be helpful

- Communication skills
- Interview skills
- Basic facilitation skills
- Confidentiality
- Basic safety

Checklist: Ensure all of your bases are covered!

- ✓ Initial meeting with sponsor group
- ✓ Identify respondents, participants
- ✓ Prepare questionnaires
- ✓ Prepare data collection materials
- ✓ Facility bookings (keys if necessary)
- ✓ Accessible location (or provide transportation)
- ✓ Notices and posters
- ✓ Snacks and refreshment
- ✓ Review work plan and timeline
- ✓ Ensure Elders are present
- ✓ Ensure interpreters are present

The main task of the working group is to set goals and objectives, find volunteers and funding, plan activities, and develop an action plan, oversee the assessment and evaluate its success.

Developing the terms of reference guides and directs the group as they work through the initial and subsequent stages of the needs assessment process.

Characteristics of Effective Working Groups:

- ∞ Clear understanding of goals and objectives
- ∞ Two-way communication among members
- ∞ Effective decision-making methods
- ∞ Shared leadership
- ∞ Comfortable working atmosphere
- ∞ Recognition of individual contributions
- ∞ Sense of unity and cohesiveness
- ∞ Set the norms or ground rules
- ∞ Shared group values
- ∞ Trust and commitment

Terms of Reference or Role of the Working Group

Your working group may agree to:

- promote the needs assessment and encourage community participation
- provide advice and experience on the development of the goals
- assist in the development and suitability of needs assessment tools and methods
- review and comment on materials used in the assessment
- actively participate in facilitating public forums and assist in building relationships and partnerships
- organize and monitor the work plan and progress
- keep the community informed of the progress

HOW DO WE CONDUCT A COMMUNITY-BASED NEEDS ASSESSMENT?

5

At this leg of the journey, you are at the point where you have determined what you want to assess, who will be involved in the assessment and how the work will get done. Next, you will conduct your community-based needs assessment by collecting information, or data, to help you assess the needs in your community. If a specific need is in mind, the data collection will provide information on the level of need (how big is the issue), who in the community requires this the most, the factors that have made it an issue and how the community thinks the need can be met.

5.1 Why do you need to collect the data?

Collecting data helps you to get the facts, make improvements, fill the gaps, and improve accessibility to service. Data provides evidence to support the assertion or demand for specific or better services. Data collection is often required by the agencies or organizations that can provide resources to help you meet the need identified.

Gathering information about community needs helps us to:

- engage people in discussions and gain community support
- raise awareness and bring the issues to the forefront
- determine, identify and do something about issues
- develop short- and long-term plans on program needs, demand and cost
- provide information to decision-makers, planners and funders as they set priorities
- prove you know what you are doing and show you are accountable
- stimulate action or advocacy to get what the community wants

5.2 What type of information is necessary?

There are two common types of information being sought.

1. Primary Information: This is new information or data that has not yet been compiled. This could include what people need — the gap that exists between what people actually have and what is necessary; what people want — an expressed need — and what people prefer if they have an option or choice. This can include the recorded data from your community forums, the interviews of key informants and survey responses.

2. Secondary Information:

This is information or data that already exists and is important to the assessment. This could include a literature review of specific organizational reports, minutes of meetings, files, storytelling, books, articles and pictures.

Identify the type of information wanted by asking:

- Who is asking for the needs assessment?
- How will they want to use the findings?
- Who else will use it?
- Who will be impacted by it?
- Who will be making decisions about it?
- What kinds of decisions will be considered?
- How will we consult with all the stakeholders?
- How will we communicate the findings and to whom?

A needs assessment asks:

- What do people want?
- What are people's attitudes, beliefs and values?
- Who needs services?
- What options will be most relevant?
- What needs to be changed?
- How will changes be made?

Tips for Success

- Involve community members in as much of the assessment as possible
- Have a co-facilitator at large meetings (someone to help lead the meetings)
- Inform participants up-front why this information is being gathered and when they can find out about the results
- Explain how their information will benefit the assessment and contribute to community planning
- Develop a set of 12 to 16 questions that can be checked off or circled
- Pretest the survey on your working group
- Keep good records and notes
- Organize your notes immediately after each session
- Always make at least two back-ups of your work

Who should be involved when deciding how data will be collected?

A community-based needs assessment involves stakeholders from across the community. Stakeholders may include community members, community leaders, the sponsor group, partner agencies, internal agencies, external agencies and any other individuals or organizations who can inform your assessment.

You will need to identify a cross-section of people who represent the community, such as Elders, men, women, youth, service providers and leaders. It is important not to miss the input of community members who may be forgotten such as shut-ins, the elderly and the disabled. Next, decide on the number of participants you need and how you will contact them. Ask if they are willing to participate in the needs assessment. Talk about consent, confidentiality and respect up front. Get written consent if it is required.

First impressions are important. Treat each participant with respect. Acknowledge your appreciation of their willingness to be a part of the process. By answering your questions, they are consenting to tell you something about their beliefs, values and feelings.

How do you gather and record the data?

Be sure to record all the information you collect. It is a good idea to have a good note-taker with you. Perhaps someone will volunteer from the community. This will help you to organize and catalogue the written data and keep track of what people said. You can record the data by making a combination of lists, charts, reports, pictures and maps.

Always take attendance at each gathering by having the participants sign a signature sheet. You may want to contact participants in the future and will certainly want them at the final report to the community. Use an informed consent form where required. One is included in the Appendices as an example.

Wherever possible, write down exactly what is said. This will reduce the chance of misinterpretation. It also shows respect to those who contribute. They may not agree that someone else's interpretation of what they said is accurate. This will also reduce guesswork when all the data is analyzed together. If you want to use a quotation in your report, check back with the person to ensure its accuracy.

Anonymity, Confidentiality, Privacy

Discuss and obtain confidentiality and processes for ensuring accuracy and permission for using information. These standards are usually established in consultation with the sponsor and working groups.

Standards commonly used often include the following:

- ∞ All respondents will be advised of confidentiality measures (what will be done to protect the identity of people who participate).
- ∞ At the end of assessment process, all documents and materials become the property of the sponsor group or destroyed according to the wishes of the community.
- ∞ All respondents will sign an informed consent form when required.
- ∞ A numbered file code will be used to count a respondent and for reporting where names are unnecessary or unwanted.
- ∞ All personnel, both paid and volunteer, will receive training in confidentiality measures.

5.3 What tools will you use to collect the data?

There are six commonly used approaches for gathering new and existing information as noted below. Combine at least two of the approaches to make sure more of the community has input. The literature review, as discussed below, is always a part of any assessment.

A) Key Informant Approach

This is primary research and involves holding face-to-face interviews with a broad section of individuals in the community.

B) Community Forum Approach

This is primary research and involves holding a series of public meetings with participants to discuss the needs and priorities facing the community and what can be done to address them.

C) Survey Approach

This is primary research and involves gathering information through a survey by phone, mail or in person using a list of predetermined questions.

D) Asset Mapping Approach

This is primary research and involves facilitating discussions about community strengths and creating a map of the various services, agencies, groups and facilities.

E) Focus Group Approach

This is primary research and involves facilitating in-depth group discussions and completing a short questionnaire on the key issues being addressed.

F) Literature Review

This is secondary research and involves reviewing relevant printed materials such as minutes of meetings, reports, files and correspondence.

The Tools

You will be able to involve more community members and hear more ideas if you use a combination of approaches to do the assessment. In choosing the best tool for your needs assessment, consider what resources are available and take into account the demands various tools have such as timeframe, cost and preparation.

These methods are recommended because they give you a greater variety of responses from a broader section of the community. It is important to choose methods that enable you to reach the individuals you need in order to accurately complete your needs assessment. No matter which method is chosen, it is very important that the lead person is skilled and knows when to enlist outside or professional help.

Methods involving face-to-face meetings with individuals need to be done by someone who has some interviewing training. Group processes need a skilled facilitator to help them stay on track and to ensure important issues and ideas emerge. The facilitator provides a balance between offering probing questions and enabling new ideas to emerge on their own. It is up to the facilitator to guide the group, but up to the group to do the work.

Example questions to consider:

- What are the most important needs facing our community?
- Why are these important needs?
- What is going good for us?
- What are the barriers and gaps?
- What have we done to help meet these needs in the past?

Strengths and Weaknesses of the Approaches**A. The key informant approach**

In this method, informants (specific community members) provide the needed information (data). They are considered the people in the community who can provide this information because they are in the best position to know what the issues facing the community.

Who are key informants?

- Elected leaders
- Agency administrators
- Community professionals/service providers
- Community members — Elders, youth, men, women
- People who use the service that you are assessing
- Leaders of community service organizations
- Professionals in specific service areas

How do you carry out the key informant approach?

- Make a list of key informants by name. Add other information where you can such as where they work or which community group they are representing
- Decide how you want to collect the information from them
- Create a brief questionnaire or interview to obtain the information you need
- Gather the supplies (clipboard, pencils, stamped and self-addressed envelopes)
- Conduct the interview and gather the data
- Organize and interpret the data (what have people told you?)

Strengths

- One of the easiest, most organized and least expensive ways to find out the needs and priorities
- Can open communication and build trust with community members
- Good for getting solid information of concerns and issues
- The assessor can ask and make sure the ideas are understood as they are given by informants
- Can easily be combined with other techniques for a better overall result
- Many different voices can participate in this method and a variety of points of view on the needs and priorities can be included
- Easy for community volunteers to do. At the same time, they build personal skills, and increase citizen involvement and awareness

Weaknesses

- It is intensive and time-consuming
- The information may give a biased perspective if the information is not gathered from a wide range of individuals
- The information given by key informants may be biased if they are associated with an organization or group that desires a certain result
- Jealousy and resentment may develop with those who did not participate

Follow-Up to the Key Informant Approach

- Responses from the key informants can be documented in a report. You may want to review the report with them to obtain their feedback and interpretation of the findings. This can also be used to make sure you are reporting what they have said not what you thought they said.

B. The community forum approach

In this method, a wide variety of community residents provide the needed information or data. Issues and community needs are raised in a group discussion and a six to eight question survey through a series of public meetings.

Who should be invited to the forums?

- Send an open invitation encouraging all community members to attend including those who participated in the key informant approach. It is a good idea to hold at least two forums to encourage everyone to attend — one during the day and one in the evening.
- Ensure Elders and interpreters are present.

How do you make the public forum approach happen?

- Develop a list of –six to eight questions for group discussion
- Book a meeting place that is accessible and easy to get to or provide transportation
- Advertise and give notice of the purpose, date, time and place at least two weeks ahead of time
- Arrange to have snacks and refreshments available as this seems to attract higher numbers of participants and shows the organizers are hospitable
- Gather the necessary supplies (questionnaires, clipboard, pencils, stamped and self-addressed envelopes, facility key, door prizes)
- Enlist members from the sponsoring group or working committee to co-facilitate the forums, offer guidance and respond to participant questions
- Have a skilled note-taker record the discussion, comments, questions, etc., in writing. Flipchart paper is a good tool because everyone can see it
- Encourage open discussion and exchange of ideas through a talking circle to aid in everyone having a chance to provide input
- Give a survey to those who prefer to share their ideas in an anonymous or confidential manner
- Be well prepared (follow the Tips for Success in section 5.2).

Strengths

- One of the easiest and least expensive approaches to collect data

- Different points of view will come from a wide range of community members
- Provides an opportunity for community members to actively participate in the needs assessment process
- Brings the service providers and consumers together (this can improve communication between them)
- Brings community issues to the forefront
- Other approaches are easily combined

Weaknesses

- Lack of advanced planning and advertising may result in a poor turnout
- Groups or individuals with strong opinions may participate the most in the forum
- Forums can, if not carefully facilitated, become a place to complain publicly about organizations or service providers and staff

Follow-Up to the Community Forum Approach

- The group discussions and responses to the survey questions can be documented in a report. You may want to review the report with them to obtain their feedback and interpretation of the findings. Be sure to note any themes or trends which emerge from the discussions.

C. The Survey Approach

In this method, a variety of community residents provide the needed information or data through the process of interviews and questionnaires. Examples include Individual face-to-face interviews, personal distribution and collection of written surveys and telephone interviews.

Who should complete the survey?

- Hand out or mail the survey to as many community members as possible.
- It is important to interview a wide cross-section of the population.

How do we make the survey approach happen?

- This can be done by going door-to-door, by telephone, through the mail, drop-off and pick-up
- Gather the necessary supplies (questionnaires, clipboard, pencils, stamped and self-addressed envelopes)
- Community volunteers can be used to make the survey and conduct interviews if they are properly trained
- Sometimes in-home interviews are conducted with hard-to-reach individuals such as the elderly, shut-ins or the disabled
- To increase your participation rate, it is recommended that mailed surveys are followed up with a telephone call to those who have phones

Strengths

- One of the best methods for gathering information from a wide range of individuals
- Provides an opportunity for the entire community to be involved in the needs assessment and decision-making processes
- Other approaches are easily combined

Weaknesses

- One of the least time-consuming, but a costly approach
- Results may not be valid if the survey is not designed or completed correctly
- Individuals sometimes hesitate to answer questions
- Literacy and language barriers may not be known and may exclude some respondents

Follow-Up to the Survey Approach

- Responses to the survey questions can be documented in a report. You may want to review the report with them to obtain their feedback and interpretation of the findings. Be sure to note any themes or trends that emerged from the surveys.

D. The Community Asset Mapping Approach

In this method, information is collected about the community's strengths from community members. It creates a map of the various services, agencies, groups and facilities that make a positive difference in the community.

Who should be invited to a community asset mapping session?

- Ideally the participants represent the community and include participants of all ages with varying roles or from different walks of life in the community. This may include those who seem to have the role of being invisible in the community.

How do you make the community asset mapping approach happen?

- Develop a list of questions to help the groups think of community strengths
- Book a meeting place that is accessible, easy to get to or provide transportation, if possible
- Advertise and give notice of the purpose, date, time and place at least two weeks ahead of time
- The sponsoring group or community should attend and co-facilitate the forums
- Gather the necessary supplies: chart paper, masking tape, many sets of coloured markers, scissors, coloured paper, index cards, flipcharts, flipchart paper and pens. You may also ask participants beforehand to bring pamphlets from various agencies and groups
- Arrange to have snacks and refreshments available which seems to attract higher numbers of participants
- Encourage open discussion and exchange of ideas in both the small and large groups. A talking circle to start each small group will ensure everyone has a chance to provide input
- Be well prepared. Learn about the community asset mapping approach or find a facilitator who can do the session

Strengths

- A wide variety of ideas will come from the various small groups
- Offers a good way to find out what is really valued and what is rarely valued
- The “holes” in the map help identify what is missing from the community
- Small group will involve everyone, especially those who don’t participate in large groups
- Brings people of different ages and roles together
- Helps the community feel good about what is going well

Weaknesses

- Takes more time than other methods might because it involves both small group and large group work
- It will need a “next step” to go beyond identifying the community assets

Community asset mapping is rarely done in isolation. It is done in combination with other assessment approaches. “Next steps” involve identifying what is missing and how to get there. It also involves recognizing that what is going well requires maintenance and maybe even improvement. A variety of approaches are available to take the needs assessment to the next level.

Follow-Up to the Community Asset Mapping Approach

- Responses to the community asset mapping approach can be reported as a map or diagram. You may want to review the report with them to obtain their feedback and interpretation of the findings. Be sure to note any themes or trends that emerged from the group work

Once the assets are mapped, the community members can build on the strengths and create ways to make what is needed happen by using the strengths where possible. The group shouldn't be too large because this method involves dividing the total group into smaller groups to do the asset mapping. The results are gathered and organized into one map or diagram. Small groups of 4-6 people sometimes need guidance as they are working, so the number of facilitators involved may have to be increased if the community interest is high. If this isn't possible, then enrollment should be limited but also representative of the community.



An example of a community asset map.

E. The Focus Group Approach

In this method, information is provided from a select group of community residents who have specific knowledge on the key issues being looked at.

Who do we select for the Focus Group?

- Group of 6-12 people (consumers, service providers, community leaders) who have specific knowledge on the key issues being addressed

How do we carry out the Focus Group approach?

- Identify and contact each participant
- Gather the necessary supplies (flipcharts and paper, pens, note paper, facility key)
- Arrange to have snacks and refreshments available which seems to attract higher numbers of participants
- Present the information, then follow with small group work leading into a large group discussion
- Combine this with a short questionnaire specific to the issues you are discussing
- Be well prepared. Learn about the focus group approach or find a facilitator

Strengths

- A wide range of information can be gathered in a short period of time (2 hours)
- Related/unanticipated topics can arise from the discussion
- This method can be used to build upon key informant responses

Weaknesses

- Participants may not represent the diversity of the community
- It takes a lot of preparation and needs a trained facilitator/interviewer knowledgeable on the issues

Follow-Up to the Focus Group Approach

- Responses to the Focus Group questions can be documented in a report and given to each focus group participant. You may want to review the report with them to obtain their feedback and interpretation of the findings. Be sure to note any themes or trends that emerged from the discussions

F. Literature or Document Review:

Secondary research such as a literature or document review can be undertaken to:

- Identify issues relevant to the assessment;
- Identify current policies related to the assessment;
- Assist in the development of background documents for discussion in focus groups; and,
- Create a resource document on the issue being assessed.

5.4 What tools will you use for data analysis?

Data Analysis

Data analysis is the next step of the needs assessment. Once the data collection process is completed it should provide you with information on the needs, wants and preferences of the participants. It should also identify existing and needed services, types of gaps and barriers and priorities in the community. Findings must be clearly linked to the problems or issues in the community.

You can analyze the data collected from the needs assessment through the following

means:

- Record and count the participation rate and responses
- Read and review the data from interviews, questionnaires and minutes from community and group meetings
- Review and search for patterns of regularities, recurring ideas and experiences that link respondents' perspectives
- Find common themes and categories from the data
- Identify critical concerns for immediate attention
- Remain objective when reaching conclusions and making recommendations
- Ensure your conclusions are supported by the data collected

Participation Rates

Several factors can impact the number of people available to take part in your needs assessment. Some examples are illness, death, community politics, community events, weather, holidays, sensitive nature of the subject matter, lack of adequate relationship with assessor, etc.

You can determine the participation rate by counting:

- the number of individuals attending public forums
- the number of individuals from face-to-face interviews
- the number of individuals from telephone interviews
- the number of responses returned from surveys at public forums
- the number of responses returned from mail out surveys

Follow-up

An important part of the community based needs assessment process is to provide an opportunity for stakeholders to review the information after the data has been analyzed. Once the draft report is prepared, it is presented to the sponsor group for their comments and feedback. It is important that they understand the findings, agree with the conclusions and recommendations and approve release of the draft before the information is shared with others. You may also want to offer respondents an opportunity to comment on the initial findings as a measure of accuracy. The first draft could be taken back to respondents in the form of a community meeting.

5.5 How do you organize yourself to do the needs assessment?

The success of your community-based needs assessment will be determined in a large part by how well it is planned and organized. Like any journey, you are more likely to reach the destination if you know where you are going and how you are going to get there.

Planning is bringing the future into the present so that you can do something about it now.

Alan Lakein
Time Management Consultant

Your Work Plan

It is helpful if your work plan is put on a timeline or calendar which shows when something will happen and any preparation or follow-up required. A planning chart is a good tool for this. It is a chart that lists the time frame across the top and the tasks along the side. You list the tasks in sequence (what needs to be done next). As you do this, you can assess how much time each task will take and if any of the tasks need to overlap or occur at the same time. This helps you create a realistic picture of how long the total assessment will take. The chart is not only helpful for planning the activities but for tracking their progress as well. Sometimes we have great ideas but don't realize how much time it will take to plan them, make them occur and then follow-up. For tracking purposes, the chart can tell you who has been given the task and the stage it is at. For example, you can plan an event, but if you don't make arrangements for notifying people well in advance so they can attend or have a convenient place to hold it, it will flop.

Below is a brief example of how the chart can be used.

Using a Chart to Plan: Our Trip to Batoche

	WK	WK	WK	WK	WK	WK
Tasks	1	2	3	4	5	6
Family meeting to discuss the trip. Find out dates. Book holidays. Save for the trip.						
Read about Batoche. Talk to others who have been there.						
Arrange to borrow tent. Call relatives in the area.						
Book campsites if needed.						
Check on other attractions in the area.						
Find someone to take the pets for a while.						
Pick up tent. Pack clothes and camping gear. Pack cooler.						
Car check and maintenance. Drop off pets and food. Travel time.						
Arrive at Back to Batoche. Stay the week.						

You can assign names to the task and checkmark the tasks as they are completed. Here it is evident that about six weeks advanced planning will help you get the most out of the trip.

5.6 How can you review the plan with stakeholders?

Once the work plan is complete, review it with the Working Group and the sponsor group. An information meeting can be set up to present the plan to stakeholders for their feedback and input prior to the first interview. Identify key stakeholders who are willing to be involved in ongoing monitoring of the assessment. This is important in the event that something unexpected comes up or a significant change must occur. Keep the communication lines open. For those who are unavailable for in-person meetings, be sure to hand deliver, fax, mail and/or email your meeting notes.

6

HOW DO YOU PUT THIS TOGETHER?

6.1 How do you prepare for and write your report?

The actual time to conduct a needs assessment usually takes three to six months or more depending on the magnitude and sensitivity of the issue. Start thinking about the format of your report at the same time as you design your questionnaires and plan your meetings. This will help reduce the necessity to rush to get your report written.

6.2 What is the Needs Assessment Report?

The Needs Assessment Report provides all the compiled information on existing programs and services, how they have affected the community and its members, what is needed, data collection and analysis and ways to address those needs.

The contents include:

- a. A statement on why you did the needs assessment
- b. Who requested or commissioned the needs assessment
- c. *Cost and source of funds (optional)
- d. A description of the methods used to collect the information
- e. A description of the target group/sample
- f. The results of the needs assessment
- g. The analysis of the results
- h. The summary
- i. The conclusions
- j. The recommendations
- k. Graphs, statistical tables, research tools, pictures
- l. Bibliography or reference list

The Needs Assessment Report (sometimes called the 'Final Report') goes to the sponsoring group who requested the needs assessment. They are responsible for deciding who will receive the report and its distribution. Section 7.0 looks at who may be interested in your report, why they are interested and what information you may want to share.

Table of Contents for the Needs Assessment Report

- Purpose of the Report
- Background
- Project Team/Working Committee
- Methodology
 - sample
 - interview schedule
- Findings - key issues
- Analysis
 - short-term implications
 - long-term implications
- Recommendations
 - short-term internal
 - long term
 - developmental plan
 - evaluation plan
- Appendices

6.3 What is the Summary Report?

The Summary Report is a shorter version of the needs assessment report and provides an overview of the results. It can be used for presentations at meetings and available to others as determined by the sponsor group.

The Summary:

- a. Lets people know the purpose (why you did the needs assessment),
- b. The scope of the report (what you were doing it on/hoping to do),
- c. The major points in the report (what you found out)
- d. Highlights of the conclusions (what stuck out, what the results mean), and
- e. Highlights of the suggestions or recommendations (what have you been told needs to happen)

Table of Contents for the Summary Report

- Title Page
- Table of contents
- Contributions/Acknowledgements (are there people or organizations that had a role or should be thanked for their involvement?)
- Summary
- Highlights of Conclusions
- Highlights of Recommendations
- List of figures
- List of tables

7

HOW DO YOU SHARE YOUR REPORT?

Just as you have carefully determined the focus of the assessment and planned how to conduct the process, careful planning for sharing the findings is also necessary. How well you do this will have a big impact on how you meet the identified needs. You will need both people and resources to make this difference.

7.1 What have you learned?

Through the community-based needs assessment process, residents were consulted and the information they shared was compiled and now you:

- Have now identified what the most pressing needs are and can respond accordingly.
- Are now aware of the gap between current and desired services
- Know what is needed or wanted at the community level, by the health authority, etc. because you have learned about the needs expressed through the assessment process.
- Have a solid base of information about the needs, priorities, capacities and expectations of the services in the community.

The community now has all the necessary information to begin to address the needs and to apply for funding if it is needed. The findings can be used to help with the planning and ongoing evaluation of community programs and to help others make decisions on what action to take next.

7.2 How do you share the information with the community and other stakeholders?

Upon completion of the needs assessment report the sponsor group will want to approve the contents of the final report as well as approve its release to the community. Once the report is approved, the sponsor group will inform the community of the results, conclusions and recommendations. Several methods can be used such as public notices, newsletters, presentations to general assemblies, community meetings and through distribution of the needs assessment report.

Several people or groups may want to know the results so it is important to consult with the sponsor group on who is eligible to receive the final report. Let's look at who these people or groups are and what they may want to know.

The people who wanted the needs assessment done

Generally, the results may serve as a basis for decision-making, problem solving, planning and priority setting. It may also guide the proposal writing stage for necessary programs. They want to know the complete findings and how the assessment was carried out.

The funders

If your assessment has been requested by a funder who can help get the needs met, they will also want the same information as above.

The participants and interviewees

Those who were interviewed, surveyed or participated in meetings may want the results to compare their opinions with others who took part in order to use it to influence policy or action and/or to get some kind of 'pay-off' for their time and effort.

Staff, community members or other organizations

They may be curious because they saw the questionnaires or talked to someone who took part in the assessment.

The media

Media groups are usually interested in reporting on assessments because the community is interested. They may want additional information such as the cost of conducting the assessment.

Others (governments, universities, outside consultants)

Others may want the results if the assessment was focused on a specific target group or program.

7.3 What becomes of the work you have done?

The next phase of your work starts once the needs assessment is completed and the final report is written.

You have just finished the initial step that will help you plan the work required to address the community needs. It is the responsibility of the group doing the work to move it ahead.

If the assessment was requested by the community, it can become a proposal to access provincial or other funding and can be used as an advocacy document to help the community get what it wants or needs. If the assessment wasn't community-driven, it may be ignored or rejected.

A community needs assessment is the first step to access government funding. Funding agencies need evidence of community consultation and identification and definition of community needs.

Edmund Gus

Métis Health Policy Forum Summary

May 12, 2002

WHAT DOES ALL THIS MEAN?

Your community-based needs assessment has taken you on a journey in which you have encountered many people and diverse ideas. It has been a learning experience as each needs assessment is a unique undertaking. You are now a seasoned traveller with new tools at your disposal! You have the experience behind you to do a better job on your next journey and to advise others as they begin theirs!

By now you will have realized that the journey itself was as important as the destination. Perhaps you have landed somewhere you were not expecting. However, you probably also feel this is where you were meant to arrive. You and your fellow travellers have shown one another that the journey is more rewarding when it is taken together and that your combined knowledge and skills makes any obstacle something you can overcome.

You will have deepened your understanding of how important it was to our Métis ancestors to work together on behalf of the community. Our ancestors would take pride in the respectful dialogue which occurred, your thoughtful concern for the community and everyone in it, and your commitment to ensuring Métis communities continue to thrive and exist.

Now it is time to celebrate those achievements while you catch your breath and prepare for the next leg of the journey.

APPENDICES

1 Request for Proposals (RFP) - A Model for Conducting Community-Based Needs Assessments in Métis Communities, October 1, 2004

¹ The RFP used by the Métis Centre at NAHO to elicit proposals for the delivery of a Needs Assessment Guide is included here to illustrate what a well-constructed, detailed Request for Proposals looks like, as RFPs are often not as detailed. This detail also provides background, definitions, references and content about why the Guide was initially developed.

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1. Statement of Work

1.1 TITLE

A Model for Conducting Community-Based Needs Assessments in Métis Communities

1.2 OBJECTIVES and BACKGROUND

The need for capacity building in Aboriginal communities has been widely recognized by the Royal Commission on Aboriginal Peoples (1996) and identified in “virtually every Aboriginal forum, working group and research study related to Aboriginal health and wellness.”² A primary outcome of the Métis Health Policy Forum held in 2002 was the reaffirmation of the need for effective capacity building at the local and regional levels. Forum participants identified Métis health issues specific to the negotiation of funding, health information, research, community-level concerns, education and training of Métis, and the need for Métis-specific culture-based program/service access and delivery. The Métis Centre at NAHO was encouraged by Forum participants to move forward and develop Forum outcomes that lead to health information research and capacity building generated and controlled by Métis.

Any capacity building activities must take into account Métis cultural values, knowledge and worldview as well as current levels of community development and barriers to advancement unique to Métis communities.

How the Métis Centre Views Needs Assessment within Capacity Building

For the purposes of this RFP, Undertaking a Community Needs Assessment is viewed, in general terms, as a process to discover and understand the needs of members of the community (be that a group, larger community or population) towards enhancement of the health of Métis. Assessing community development needs provides an overview of a community's state of health. The Needs Assessment process precedes the planning of projects, programs or actions which aim to improve a health situation or condition in the community. An effective needs assessment is a way to ensure successful projects. Needs may be assessed through impressions that are based on a general knowledge of the community. Undertaking a formal needs assessment helps communities understand their needs and to prioritize their importance. In the end, the needs assessment process should be flexible and realistic.³

A community has unique assets and knowledge in addressing their community's needs and there are several effective ways to support community capacity building. Capacity building within Aboriginal communities is defined as:

Capacity building is a process not a program. Effective capacity building is a way of planning for the future and carrying out existing programs with a clear goal of greater self-determination.⁴

Capacity building in Métis communities, which are increasingly urban, must consider both mainstream approaches and also the cultural values and indigenous knowledge of each community. It must also consider that levels of development may vary greatly by community. *Ultimately, capacity building in an Aboriginal context is aimed at creating conditions for community participation in decision-making, to*

² Kinnon, Dianne and Koebek, Jaime. *Capacity Building for the Health of Aboriginal Communities: A Discussion Paper* [DRAFT]. NAHO. No date. Pg. 1.

³ Health Canada. *Community Action Resources for First Nations, Métis and Inuit: Assessing Needs*. 2003.

⁴ Kinnon, Dianne and Koebek, Jaime. *Capacity Building for the Health of Aboriginal Communities: A Discussion Paper* [DRAFT]. NAHO. No date. Pg. 6.

ensure that the needs of a community are being met and to break down the “hierarchies between trained professionals and those they work for.”⁵

In light of the challenges of developing effective population health initiatives with and for Métis, this RFP process seeks to provide effective, culturally appropriate capacity-building tools to be utilized by Métis communities. A Community Needs Assessment Model is to be responsive to the needs of individuals and communities.

The Métis Centre is seeking to facilitate skills enhancement of community health workers, volunteers and those in related social services to support *holistic, integrated and community-driven solutions* to community health priorities. As such, the Métis Centre is releasing this Request for Proposals for the development of a Model that will strengthen community resources and decision-making capabilities.

This RFP has been developed under the mandate and goals of the Métis Centre’s Object 4 mandate:

“Capacity Building and Métis Health: Foster the recruitment, retention and training and utilization of Métis in Canada in the Aboriginal Workforce in the delivery of health care”.

This RFP refers to a core activity under the Métis Centre’s Work Plan. Namely, the development of a **Community Needs Assessment Strategy Model** that will promote, encourage and enhance Métis individual and community participation in developing community-based population health-related services, programming and/or health education awareness strategies within Métis communities.

1.3 SCOPE/STATEMENT OF WORK

1.3.1 This is a general RFP call to Aboriginal and non-Aboriginal individuals, firms, or organizations to submit a detailed and comprehensive proposal to develop:

- A Model for planning for and undertaking a Community-Based Needs Assessment to be used by and for Métis communities.

1.3.2 The successful candidate, firm, or organization will demonstrate a solid grasp of the following:

- Métis culture and history and current Métis population health issues,
- Indigenous concepts of health and well-being,
- Métis governance and self-determination, and,
- Legislative factors affecting Métis rights to health service access and program availability.

The successful candidate, firm, or organization must demonstrate a solid grasp of the scope of the project, using the above guiding principles and concepts to address the following items with appropriate deliverables. The role played by the successful party would be as the principal researcher and writer of this material. This work will be completed under the guidance, direction and input of the Métis Centre.

Outline of the Community Needs Assessment Model

The final version of the Community Needs Assessment Model will be a print publication that may be adapted as a web-based guide.

It is intended to provide **plain language** information to Métis community members and organizations on assessing their community development needs. The language of the final product must therefore be accessible to a general audience that may not have prior knowledge of the subject.

⁵ Ibid. Pg. 9.

Overall, the Model will include:

- Basic Strategies for developing an effective community needs assessment plan;
- Descriptive outline on creating and evaluating Métis population health information and resources;
- An outline of how to incorporate community consultation processes and incorporation of indigenous health knowledge as held by community members; and,
- A descriptive outline on how to create tools for collecting and evaluating information.

As a starting point, specific sections of the Community Needs Assessment Model are outlined below. This is an outline only; the successful contractor should be able to provide further detail, section or components as appropriate.

Section 1: Planning for and Assessing The Need:

- Description of what a Needs Assessment is and is not – i.e., the Model should describe why communities need to undertake a needs assessment.
- Development of a Needs Assessment map or illustration that community groups can use to identify and understand how, when, why and who should be involved in a community assessment project.
- Setting up the appropriate Planning and Management Committee to undertake the community needs assessment. This section would require guiding principles for:
 - Developing the overall management plan;
 - How to define the scope of activities to be undertaken;
 - How to develop list of activities to be undertaken, and by whom on the Committee;
 - The need for a Research Coordinator or a Project Manager to help manage and guide the overall needs assessment;
 - Developing a Terms of Reference – including roles and responsibilities;
 - A guide or check list for assessing who should be part of the Committee – i.e., health care providers, Elders, women and/or youth. This should include how and when to develop partnerships;
 - A primer, in plain language, for community participants on Project Management in relation to undertaking a Community Needs Assessment. This may be described in a mini guide format that includes:
 - What is Project Management and why is it necessary;
 - How to develop an effective work plan that will meet goals and deliverables; and,
 - Setting reasonable timelines for activities and components of the project.
- Identifying culturally appropriate methodologies to address and assess the need or issue identified in the community. This section would require further detail on:

Data and Information Gathering:

- Accessing, manipulating, and describing Community Information for the purposes of:
 - identifying a specific or a range of Métis population health priorities or issues;
 - designing culturally appropriate research tools that respect and take into

- account indigenous knowledge and historical experiences – including storytelling, participatory research⁶, community experience and knowledge, traditional practices and healing, etc.;
- understanding why gathering community information⁷ and statistical data is necessary to help identify priority health issues and concerns; understanding how, when and where to use statistical data and where data comes from, what statistics mean, and how to interpret statistics;
 - When and how to conduct surveys, focus groups, interviews, and other research methods for gathering relevant information from community members;
 - How to undertake an environmental scan of community services, programs, demographics and other relevant services;
 - The need for gathering and being aware of relevant community reports and policies that pertain to the health issue or concern identified;
 - The development of a specific research or proposal question to be explored by the community;
 - Awareness of research ethics that respect Métis values, beliefs, rights and privacy issues⁸; and,
 - How to develop a “baseline” of information and what this means in relation to measuring any impact a new program or service may have in the community.
- Emphasis on the need to discuss community-based research and projects with community members, researchers to ensure the project will not duplicate current research and will include appropriate community and external participation.
 - Model should include descriptions and sample of various research methods and ways of collecting data – i.e., population health social indicators, service use, key informant surveys, community survey, focus groups, interviews, etc.

Section 2: Keeping the Community Informed

- Descriptions on activities and communication methods for keeping community members aware of and informed about the community assessment being undertaken, status and outcomes.
- The development of Evaluation Criteria for measuring effectiveness and appropriateness of project recommendations, findings and the determination of need.

6 Participatory research is a systematic inquiry with the active involvement of those being studied. Participatory research is usually action-oriented, where those involved in the research process work together to define the research, collect and analyse the data, produce a final product, and then act on the results. *Ways of Knowing: A Framework for Health Research*. NAHO 2003.

7 Ibid. Pg. 13-14. “Such research will be grounded in Indigenous values, principles and methods, and provide analysis and interpretation grounded in Aboriginal experiences and cultural knowledge. Indigenous knowledge has much to contribute, both in and outside the Aboriginal community, particularly to population health, environmental health and health system renewal. Research activities might include documenting Indigenous research practices and principles, cultural values and Elders’ teachings, promoting inclusion of traditional medicine and healing in health programs, and evaluating programs and services from an Indigenous perspective.” “For health research to be of benefit to the Aboriginal and the research communities, it needs to be credible to both communities, and of the highest quality. Research designs need to be carefully designed and methodologically sound, yet flexible and adaptable.”

8 Aboriginal-led and owned research respects the principles of OCAP: See *Ownership, Control, Access and Possession (OCAP) or Self-Determination Applied to Research. A Critical Analysis of Contemporary First Nations Research and Some Options for First Nations Communities*. Brian Schnarch, First Nations Centre, National Aboriginal Health Organization

See First Nations Centre Power Point presentation entitled *OCAP 101: First Nation’s Principles in a University Setting*,.2004 at <http://www.naho.ca/firstnations/english/pdf/1>.

Section 3: Writing the Community Needs Assessment

- Section should outline what should go into the Final Needs Assessment Report, including:
 - Process;
 - Information Summary;
 - Using the data and information gathered to demonstrate gaps, need and future vision to meet the need(s); and,
 - Why the need to develop Criteria to prioritize needs.

Section 4: Tips on Disseminating Report and Findings

- Section should discuss importance of publicizing conclusions and recommendations with the community and all individuals involved in completing the Assessment;
- How to develop a Communications Strategy to disseminate report and findings; and,
- A Mapping Tool for taking the needs assessment to an implementation or further planning stage.

Final product by the contractor should not take more than 25 days to complete.

1.4 DELIVERABLES/MILESTONES

- Steps for producing the Model and estimated timeframes are outlined as follows:
 1. Content to be produced by an expert contractor chosen via Request for Proposals (25 days), including:
 - Literature review (to be developed in association with the Métis Centre);
 - Detailed outline (for review by Métis Centre); and,
 - Written content (by contractor for review by Métis Centre review panel including external peer review member).
- **Friday, November 19, 2004** - First draft submitted to Métis Centre. Draft will be reflective of Métis Centre and the National Aboriginal Health Organization's writing, terminology, and plain language guidelines (which will be provided by the Métis Centre) as per the potential contract, and to ensure cultural appropriateness in developing this information for the target audience.
- **Friday, December 10, 2004** - Final draft submitted to the Métis Centre (will include consolidated feedback to 1st draft as noted above. Final draft will reflect the Métis Centre's and the National Aboriginal Health Organization's writing terminology, and plain language guidelines (maximum 7 to 10 days work).
- **Friday, December 17, 2004** - Final completed Community Needs Assessment Model submitted to the Métis Centre.

1.5 CONFIDENTIALITY

- 1.5.1 It is a condition that, prior to performance of any obligation under any contract resulting from this RFP, the Contractor and any of the Contractor's employees assigned to the performance of such contract respect the confidentiality of participants in any interviews or discussions undertaken to complete the Model.

1.6 TIME FRAME

- 1.6.1 The services of the Contract will be required for a period commencing on or about September 22, 2004, up to and including November 5, 2004.

Submission deadline:	5:00 P.M. EST on Friday, October 22, 2004
Work to be completed by:	December 17, 2004
Approximate Workload:	25 Days
Maximum Cash Value:	\$12,500

2. Proposal Instructions

2.1 CORPORATE /COMPANY NAME

- 2.1.1 The proposal shall contain a statement of the name and laws under which the company was legally incorporated (if applicable).

2.2 CORPORATE/COMPANY REFERENCES AND RESUMES OF PROPOSED RESOURCES

- 2.2.1 Qualifications, previous experience and resumes of each resource.

2.3 PROPOSAL SUBMISSION

- 2.3.1 You are invited to submit a proposal, with 3 copies, to fulfill all the requirements of this RFP. When responding, your proposal is to be submitted directly to the attention of the **Métis Centre** representative whose address is shown on the front cover page of this RFP package entitled Issuing Office.
- 2.3.2 If mailed, the proposal must reach Métis Centre at least one (1) day prior to the closing date to allow for internal mail distribution.
- 2.3.3 The **Métis Centre** requires an Electronic copy of the proposal, in Word format and in PDF on CD, to also be sent by the deadline noted on the front cover to the attention of the **Métis Centre** through our general e-mail box at: metiscentre@nahc.ca
- 2.3.4 Your proposal price must remain firm for a period of sixty (60) days from the closing date.
- 2.3.5 No payment will be made for costs incurred in the preparation and submission of a proposal in response to this RFP.
- 2.3.6 No costs incurred before receipt of a signed contract or specified written authorization from the Métis Centre representative can be charged to the proposed contract.
- 2.3.7 The Métis Centre reserves the right not to award a contract as a result of this RFP.

2.4 TECHNICAL PROPOSAL

Your technical proposal component must be concise and address the elements listed in Section 3 entitled 'Bid Selection Process' in addition to the following points:

- 2.4.1 State your request for any changes to the Statement of Work. Such changes shall be clearly identified and shall be priced separately as an option. However, your technical proposal must meet the requirements of the Statement of Work as specified therein.
- 2.4.2 Identify the proposed personnel who will be assigned to this requirement showing category and qualifications.

2.5 PRICE PROPOSAL

The price proposal component shall contain a detailed breakdown of the total quoted price. Provide a breakdown for individual phases or major tasks separately, if applicable. The price proposal should address each of the following, as applicable:

2.5.1 Based on the individual and/or labor category to be employed on the project, indicate the proposed time rate. Although detailed support for the rates is not requested at this time, you should be prepared to provide same if requested.

2.5.2 Other Expenses

List any other expenses which may be applicable, giving an estimated cost for each (e.g. travel, long distance communications, reproduction, shipping, equipment, rentals, materials, etc.).

2.5.3 Goods and Services Tax

Various items in your cost proposal may be subject to Goods and Services Tax (GST) and custom duties, and this charge must be included in the cost estimates where applicable.

2.6 NON-COMPLIANCE/UNACCEPTABLE PROPOSALS

2.6.1 Failure to comply with the requirements of this RFP may result in your proposal being declared non-responsive.

2.6.2 Proposals received after the proposal closing time will not be considered.

2.6.3 Incomplete proposals may be rejected.

2.7 ACCEPTANCE OF PROPOSALS

2.7.1 Proposals sent by fax, telex, and telegraphic means will **not** be accepted.

2.8 RIGHTS OF THE MÉTIS CENTRE AND THE NATIONAL ABORIGINAL HEALTH ORGANIZATION

The Métis Centre reserves the right to:

2.8.1 reject any or all proposals received in response to this RFP;

2.8.2 enter into negotiations with one or more bidders on any or all aspects of this proposal;

2.8.3 accept any proposal in whole or in part;

2.8.4 cancel and/or re-issue this requirement at any time;

2.8.5 award one or more contracts;

2.8.6 verify any or all information provided by the bidder with respect to this requirement.

2.9 TIME EXTENSION TO CLOSING DATE

2.9.1 No time extension will be given.

2.10 CAPABILITY SURVEY

2.10.1 If an offer submitted in response to this solicitation is favorably considered, a review committee may contact your organization to determine your technical and financial ability to perform. If so, current financial statements and other pertinent data should be available at that time, if not already on file with the Métis Centre.

2.11 ENQUIRIES

- 2.11.1 All enquiries (in writing only) and other communications related to this RFP, throughout the solicitation period and until contract award, **MUST** be directed **ONLY** to the Métis Centre representative shown on the front cover page of this RFP package.

2.12 PROPOSAL ASSESSMENT METHOD

- 2.12.1 Each proposal will be evaluated solely on its content. In order to qualify, a proposal must meet all requirements, achieve a minimum total rating of 45 points and offer the required services within the project budget (this includes travel and GST). Proposals not meeting these requirements will not be considered further.

2.13 CLOSING DATE

- 2.13.1 All proposals must be received by **5:00 P.M. EST**, on **Friday, October 22, 2004**. Proposals received after this time will be returned unopened.

2.14 CERTIFICATION

- 2.14.1 The bidder must certify that the information provided in all the personnel resumes has been verified to be true and accurate. Furthermore, the contractor must certify that the personnel offered in the proposal shall be available to perform the tasks described herein within the allotted time frame.

3. BID SELECTION PROCESS

3.1 REQUIREMENTS

- 3.1.1 Any and all relevant experience should demonstrate that the contractor has the capacity, knowledge and experience to do the work outlined in Section 1.3. Any / all relevant experience should be demonstrated individual, firm, or organization's proposed methodology for the project, including the mechanism by which relevant information will be gathered.
- 3.1.2 The proposal must demonstrate an understanding of the scope of the work as related to the development of a plain language Community Needs Assessment Model to be utilized by Métis individuals and community members. The proposal should also state any assumptions or concerns.
- 3.1.3 The bidder must specify the individual(s) who will be carrying out this work. If more than one person will be involved, the primary resource must be identified. A resume for each individual responsible for carrying out the terms and conditions of the contract must be included with the proposal.
- 3.1.4 Demonstrate knowledge and experience in working with Métis people and/or communities.
- 3.1.5 State the approach and proposed methodology to accomplish the statement of work and deliverables, respective time frames and any major difficulties that may be anticipated (i.e. work plan).
- 3.1.6 A detailed budget, including per diem rates, all fees, related expenses and applicable taxes, including the firm's GST number.
- 3.1.7 A sample of previous work that demonstrates experience and that would assist in the evaluation of the proposal, and a minimum of three references relating to similar work, which was completed by the same or similar project team who will be assigned to this project.

4. BASIS OF AWARD/CONTRACT AWARD

It is understood by the parties submitting proposals that, to qualify, bidders **MUST** meet all mandatory requirements. After that, the contract will be awarded based on a determination of best value taking into account both the technical merit of the proposals, the clarity of the proposal and the price evaluations. To arrive at an overall score achieved by a firm, a weighting has been established whereby **technical merit** will be valued at **60%** of the bid and **price** at **40%**.

Rating Scale						
Score of	Excellent	Good	Average	Fair	Poor	Unacceptable
5	5	4	3	2	1	0
10	10 - 9	8 - 7	6 - 5	4 - 3	2 - 1	0

5. SAMPLE CONTRACT FORM

In the event of being awarded the work, the successful bidder will enter into agreement with the Métis Centre of the National Aboriginal Health Organization. A copy of a sample contract is available upon request.

6. RATING GUIDE

See following page for rating guide.

REQUIREMENT			COMMENT
Métis Knowledge and Involvement - Degree of Métis-specific knowledge and Métis involvement - Demonstrate knowledge and experience working with Métis - Demonstrate a sound process for achieving ethics approval with Métis	5 5 5		
Capacity to do the Work - Sufficient resources assigned to the project team to meet project deadline - Proposed team composed of a logical balance of the various professional and technical resource disciplines - The bidder and / or assigned team members have completed other similar work	5 5 10		
Management of the work - Work plan provides for attainment of objective within the time frame given - Work plan is organized and consistent with statement of work - Proposed reporting system satisfies the statement of work	10 10 5		
Methodology - Approach to the work indicates a sound and logical understanding of Métis health issues and the overall goals of the project - Proposal indicates an appropriate understanding of the area to be studied	5 5		
Quality of Proposal - Clear, concise and well organized	5		
Total Score	75		

