COMPREHENSIVE COMMUNITY-BASED PLANNING

PURPOSE: The purpose of this training module is to provide participants with the knowledge and skills necessary to apply a systematic planning approach to addressing community problems.
INDEX OF ACTIVITIES

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IDENTIFYING A COMMUNITY PROBLEM
**MODULE:** Comprehensive Community-Based Planning Process

**NAME OF ACTIVITY:** Identifying a Community Problem

**TIME:** 30 Minutes

**OBJECTIVES:** When participants complete this activity, they will have:

- Identified a community problem that will be the focus of their planning process.

**RESOURCES:**

- Identifying a Community Problem Worksheet
- Problem Prioritization Chart
- Flip Chart and markers

**PROCEDURE:**

- Break group into talking circle with 5 per group.
- Review talking circle rules.
- Distribute one worksheet per group.
- Ask the talking circle to select a messenger.
- Ask each group to complete the worksheet.
- Regroup and ask each messenger to report the group's discussion and prioritization.
- Record the prioritizations on the chart. Consolidate duplicated responses but indicate their frequency.
- Ask the large group to prioritize the list and identify one problem that will be the focus of the planning process.

**CLOSURE:** Explain that during the next sessions you will examine systematic planning as an approach to community problem solving. You will use your top priority problem as the focus of your planning process.
IDENTIFYING A PROBLEM WORKSHEET

PURPOSE: To identify a community problem that will be the focus of a systematic community-based planning process.

- Identify four serious community problems. Try to be as specific as possible.
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- Prioritize your list beginning with the problem that is most important and needs to be addressed before the others.
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- The problem we feel is most important and needs to be addressed before the other’s is?
**PROBLEM PRIORITIZATION CHART**

**PURPOSE:** To prioritize the list of problems and identify one problem that will be the focus of the planning process.

List all the problems identified by the group. Identify the priority each talking circle assigned to the problem.

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<th>Problem</th>
<th>Priority Rating</th>
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The problem the whole group feels are most important and needs to be addressed before the others is:
Clarifying and Describing a Community Problem
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: Clarifying and Describing a Community Problem

TIME: 30 Minutes

OBJECTIVES: When participants complete this activity, they will be able to:

- Clarified and described the community problem that will be the focus of their planning process.

RESOURCES:

- Community Problem Chart
- Flip Chart and markers

PROCEDURE:

- Ask the whole group to participate in this discussion.
- Review talking circle rules.
- Write the community problem in the center of the Community Problem Chart.
- Facilitate a discussion of each of the components on the chart and summarize the group's response.

CLOSURE: Explain that during the next sessions you will use this information to begin your community planning process.
COMMUNITY PROBLEM CHART

PURPOSE: To clarify and describe a community problem.

Who is affected by this problem?
How long has this been a problem?
What are the cultural issues?
What are the political issues?
What organizations/programs are involved?
What is currently being done?
WHAT IS EFFECTIVE PLANNING?
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: What is Effective Planning?

TIME: 20 Minutes

OBJECTIVES: When participants complete this activity, they will have:

- Defined planning.
- Identified characteristics of effective planning.

RESOURCES:

- What is Effective Planning Worksheet
- What is Effective Planning Chart
- Flip Chart and markers

PROCEDURE:

- Break group into talking circles with 5 per group.
- Review talking circle rules.
- Distribute one worksheet per group.
- Ask the talking circle to select a messenger.
- Ask each group to complete the worksheet.
- Regroup and ask each messenger to report the group's discussion.
- Record the talking circle responses on the chart. Consolidate duplicated responses, but indicate their frequency.
- Write a consensus definition of planning and list of characteristics on the chart. Save this for use in the next activity.

CLOSURE: Explain that during the next session the group will review and discuss definitions and characteristics of planning developed by people working in the planning field.
WHAT IS EFFECTIVE PLANNING?

WORKSHEET

PURPOSE: To define planning and identify characteristics of effective planning from the participants' perspective.

• Think of examples of planning you do in your daily life. Think of planning experiences you have participated in.
  
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• Discuss the difference between: Planning in reaction to a problem vs. Planning in action. List some of the differences.

  
  
  
  
  

• Which planning activities are effective? Which ones are not?

  
  
  
  
  

**WHAT IS EFFECTIVE PLANNING?**

**CHART**

**PURPOSE:** To write a consensus definition of planning and identify characteristics of effective planning from the participants' perspective.

What is planning? (Consensus definition)

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<th>Definition</th>
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What are the characteristics of effective planning? (Based on Group Consensus)

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<th>Characteristic</th>
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What Is Known About Planning?
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: What is Known About Planning

TIME: 30 Minutes

OBJECTIVES: When participants complete this activity, they will have:

- Defined planning.
- Identified characteristics of effective planning.

RESOURCES:

- Characteristics of Effective Planning Lecture Chart
- Essential Steps in a Well-Designed Planning Process Chart
- Flip Chart and markers

PROCEDURE:

- Explain that today you will present a lecture that examines definitions and characteristics of effective planning developed through experience conducting planning with Tribal communities.
- Review the definition and characteristics of effective planning developed by the participants.
- Present lecture material.
- Encourage participants to ask questions.
- Discuss similarities and differences between the definitions and characteristics identified by the group and the lecture material.

CLOSURE: Explain that as the group develops their planning action plan and methods, they will continue to refer back to the ideas they formulated and those presented to develop the most effective model.
CHARACTERISTICS OF EFFECTIVE PLANNING CHART

PURPOSE: To identify characteristics of effective planning in Tribal Communities.

- Emerges from the values and culture of the community.
- Emerges from the indigenous leadership of the community.
- Directly and actively involves a broad and potentially diverse spectrum of the community.
- Builds the community’s capacity for Self-Determination.
- Is not conducted in isolation from external influences and resources.
ESSENTIAL STEPS IN A WELL-DESIGNED PLANNING PROCESS CHART

PURPOSE: To identify essential steps in a well-designed planning process chart.
Benefits and Barriers to Planning
MODULE: Comprehensive Community-Based Planning

NAME OF ACTIVITY: Benefits and Barriers to Planning

TIME: 30 Minutes

OBJECTIVES: When participants complete this activity, they will have:

- Identified the benefits and barriers to effective planning in their local community.

RESOURCES:

- Benefits and Barriers Worksheet and Chart
- Flip Chart and markers

PROCEDURE:

- Break group into talking circles with 5 per group.
- Review talking circle rules.
- Distribute one worksheet per group.
- Ask the talking circle to select a messenger.
- Ask each group to complete the worksheet.
- Regroup and ask each messenger to report the group's discussion.
- Record the talking circle responses on the chart. Consolidate duplicated responses but indicate their frequency.
- When all items are on the chart, identify one strategy to implement each solution and determine if it is realistic.

CLOSURE: When the group has identified at least one solution to address each barrier, explain that during the next session the group will refer back to the benefits and barriers as they develop a local planning action plan.
## BENEFITS AND BARRIERS WORKSHEET

**PURPOSE:** To identify the benefits and barriers to effective planning in participants local community.

<table>
<thead>
<tr>
<th>BENEFIT</th>
<th>BARRIER</th>
<th>SOLUTION</th>
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**BENEFITS AND BARRIERS CHART**

**PURPOSE:** To develop consensus on solutions to benefits and barriers to effective planning in a participants’ local community.

<table>
<thead>
<tr>
<th>SOLUTIONS</th>
<th>STRATEGY</th>
<th>ARE SOLUTIONS AND STRATEGIES REALISTIC OR NOT? WHY OR WHY NOT?</th>
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Organizing Your Planning Efforts

ORGANIZING
YOUR
PLANNING
EFFORTS
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: Organizing Your Planning Efforts

TIME: 30 Minutes for Activity/2-4 Weeks to Complete Planning Tasks

OBJECTIVES: When participants complete this activity, they will have:

- Clarified and described who will provide leadership, and resources to support their local planning effort.
- Identified tasks, persons responsible, timelines and resources required to begin the planning process.

RESOURCES:

- Getting Organized Chart
- Community Organizing Workplan Chart
- Flip Chart and markers

PROCEDURE:

- Ask the whole group to participate in this discussion.
- Review talking circle rules.
- Write the community problem in the center of the Getting Organized Chart.
- Review the Community Problem Chart to stimulate the group's thinking.
- Facilitate a discussion of each of the components on the chart and summarize the group's response.
- Based on this information complete the Community Organizing Workplan.

CLOSURE: Explain that this Workplan will serve as a management guide to ensure that the initial planning steps are completed prior to beginning a needs assessment.
GETTING ORGANIZED CHART

PURPOSE: Clarify and describe who will provide leadership, and resources to support their local planning effort.
COMMUNITY ORGANIZING WORKPLAN CHART

**PURPOSE:** To identify tasks, persons responsible, timelines, and resources required to begin the planning process.

<table>
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<tr>
<th>TASK</th>
<th>WHO</th>
<th>WHEN</th>
<th>HOW MUCH TIME WILL THIS TAKE?</th>
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</table>
1. Finalize the planning group.

2. Convene the finalized planning group.
   Steps.

3. Clarify the groups roles and responsibilities.
   Steps.

4. Identify leadership.
   Steps.

5. Secure political sanctions.
   Steps.

6. Identify resources.
   Steps.

7. Other steps.
CONDUCTING
A
NEEDS
ASSESSMENT
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: Conducting a Needs Assessment

TIME: 30 Minutes for Activity/Approximately 3-8 Weeks for Completion of Needs Assessment

OBJECTIVES: When participants complete this activity they will have:

- Clarified and described the major steps required to conduct a needs assessment.

RESOURCES:

- Needs Assessment Planning Guide Chart
- Flip Chart and markers

PROCEDURE:

- Ask the whole group to participate in this discussion.
- Review talking circle rules.
- Facilitate a discussion of each of the components on the Guide and summarize the group's response.

CLOSURE: Explain that this Guide will be used to select needs assessment methods in the next activity.
NEEDS ASSESSMENT PLANNING GUIDE CHART

PURPOSE: Clarify and describe the major steps required to conduct a needs assessment.

- Identify the community problem you want to learn more about. Refer to "Identifying a Community Problem" activity.

- What do you want to learn about this problem?
  - How serious is the problem?
  - Who is affected?
  - What is currently being done?
    - Is it working?
    - Are the resources adequate?
  - What else is needed to address the problem?
  - Other questions

- For each item checked develop a list of more specific related questions.

  Item #1:
  Questions:
  1.
  2.
  3.
  4.

  Item #2:
  Questions:
  1.
  2.
  3.
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**Item #3:**

Questions:
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4. 

**Item #4:**

Questions:
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2. 
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4. 

**Item #5:**

Questions:
1. 
2. 
3. 
4. 

- Identify the ten questions you believe are most important to learning about your community problem. Then identify who you will ask. Leave the last column blank until the next activity.

<table>
<thead>
<tr>
<th>The Ten Most Important Questions</th>
<th>Who Will You Ask?</th>
<th>What Method Will You Use?</th>
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Selecting Needs Assessment and Developing a Needs Assessment Workplan

SELECTING
NEEDS ASSESSMENT
METHODS
AND
DEVELOPING A
NEEDS ASSESSMENT
WORKPLAN
MODULE: Comprehensive Community-Based Planning Process

NAME OF ACTIVITY: Selecting Needs Assessment Methods and Developing a Needs Assessment Workplan.

TIME: 30 Minutes for Activity/Approximately 3-8 Weeks for Completion of Needs Assessment

OBJECTIVES: When participants complete this activity, they will have:

- Clarified and described the methods that they intend to use in their need’s assessment.
- Identified tasks, persons responsible, timelines and resources required to conduct the needs assessment.

RESOURCES:

- Needs Assessment Methods Charts
- Needs Assessment Planning Guide Chart (from previous activity)
- Needs Assessment Workplan Chart
- Flip Chart and markers

PROCEDURE:

- Explain that today you will present a lecture that will describe the possible methods for conducting a needs assessment. The group must select a method or methods appropriate for their community and develop a workplan for implementation.
- Present the lecture.
- Encourage participants to ask questions.
- Return to question #4 of the Needs Assessment Planning Guide and fill in the methods section.
- Considering the method(s) you have selected, complete the Needs Assessment Workplan.

CLOSURE: Explain that this workplan will guide the needs assessment process. Periodic meetings must be scheduled to monitor progress and discuss problems.
NEEDS ASSESSMENT METHODS CHART

KEY INFORMANT TECHNIQUE

The Key Informant technique involves collecting information about a community problem from key knowledgeable people in the community.

Steps: 1. Clarify what you want to learn about the problem.

2. Develop a list of questions you want to ask.

3. Develop a survey form with the questions on it.

4. Select the Key Informants.

5. Using the survey form, collect information from the Key Informants through:
   a. A structured interview with each informant, or
   b. A meeting where the survey questions are discussed and responses recorded, or
   c. Asking each informant to complete the survey and return it to you.
The Community Survey technique involves collecting information from a sample of community members. If most of the target population cannot be surveyed, a representative or random sample should be selected.

Steps:
1. Clarify what you want to learn about the problem.
2. Develop a list of questions you want to ask.
3. Develop a survey form with the questions on it.
4. Select the population you want to survey.
5. Ask the target population to complete the survey and return it to you.
The Community Survey technique involves collecting information from a sample of community members. If most of the target population cannot be surveyed, a representative or random sample should be selected.

Steps: 1. Clarify what you want to learn about the problem.

2. Develop a list of questions you want to ask.

3. Develop a survey form with the questions on it.

4. Select the population you want to survey.

5. Ask the target population to complete the survey and return it to you.