



the assess guide

How to use action research in Close to Home's community organizing approach

By Aimee M. Thompson and P. Catlin Fullwood







The Assess Guide

How to use action research in Close to Home's
community organizing approach

By Aimee M. Thompson and P. Catlin Fullwood

The Close to Home approach began in Dorchester, Massachusetts, United States, through the ideas, actions, and leadership of community members working in affiliation with the organization Close to Home. It continues to evolve through the leadership and experimentation of communities throughout the United States and beyond.

Tania Allen
graphic designer
Jeff Page
photographer
Stephanie Sauvé
substantive editor

Table *of* Contents

Introduction	The Close to Home Approach	5
	Why Action Research?	7
	About the Assess Phase	8
Step 1:	Prepare for Community Organizing	10
Step 2:	Assemble/Orient the Initial Network and Assessment Team	22
Step 3:	Identify a Shared Vision and What the Network Needs to Learn	26
Step 4:	Plan How to Find Answers in the Community	35
Step 5:	Use the Assessment Methods	44
	Mapping and Observation	
	What and Why	46
	How to Develop Plans and Tools with the Assessment Team	47
	How to Collect and Catalogue Data with the Growing Network	49
	Resources and Handouts	51
	Community Surveys	
	What and Why	65
	How to Develop Plans and Tools with the Assessment Team	66
	How to Collect and Catalogue Data with the Growing Network	69
	Resources and Handouts	72
	One-on-Ones	
	What and Why	83
	How to Develop Plans and Tools with the Assessment Team	84
	How to Collect and Catalogue Data with the Growing Network	86
	Resources and Handouts	87
Step 6:	Analyze the Data	95
Step 7:	Share the Data with the Community	99
What's Next?		103



introduction

The Close to Home Approach

This document is a guide for implementing the Assess phase of the Close to Home approach. The full approach is illustrated below and described in the companion documents *Communities Leading Change: An overview of Close to Home's philosophy and practice for domestic and sexual violence prevention* and *Tips for Practitioners: Lessons learned from using the Close to Home approach*.

(Download PDFs at www.c2home.org)

Over 15 years, all of us affiliated with Close to Home developed this approach for engaging whole communities in organizing for domestic and sexual violence prevention. Still used and evolved by groups within the US and beyond, this iterative and cyclical process engages youth and adults; people of all backgrounds; family, friends, and neighbors; professionals and politicians in defining the problem, developing an emergent vision, building collective power and capacity, and creating both personal and political change. The following approach is used in conjunction with the Close to Home principles (page 14).

WHO

Organizers / Organization + Network Members (youth, adults, and civic/organizational life)

1 ASSESS

gather, learn, understand

In the Assess phase, the network learns to "see" anew and becomes curious about the community—taking the time and space required to gather, learn, and understand local knowledge, including but not limited to issues of domestic and sexual violence.

2 TALK

share, define, invite

In the Talk phase, the network opens spaces for the sharing of stories and experiences. One by one, these conversations form a shared, public analysis of domestic and sexual violence and other critical issues, while deepening the vision of the change everyone wants to create. These conversations add energy and attract additional community members to the effort.

3 BUILD

envision, propose, create

In the Build phase, the network gathers yet more community members in building the teams, plans, skills, and knowledge for designing locally-driven campaigns/actions. This is the practical and detailed work of making bold ideas viable for catalyzing domestic and sexual violence prevention. All actions are tailored to the community and co-created by network members through an exchange of skills and ideas.

4 ACT

amplify, spread, advance

In the Act phase, network members engage the community in various campaigns/actions—bringing community leadership into full view and amplifying the impact of all efforts to date. This phase results in a surge of momentum, with more community members becoming curious, engaged, and ready to act, as an ongoing spirit of social change begins to take form.

The Four Phases of the Close to Home Approach

OUTCOMES

values, culture, priorities, structures

Stronger community connections; Increased capacity to create change, community participation, community leadership; Increased action to prevent and address domestic and sexual violence; Greater priority and attention given to domestic and sexual violence issues in community; Decreased social acceptability for domestic and sexual violence; Emergence of social norms that uphold non-violence and equity

Why Action Research?

The Close to Home approach is based on an underlying belief in a community's capacity to author its own transformation. It is structured on the principles of network leadership, with the initiating organizers/organization sharing power with other community members and engaging a growing community network in the leadership of all activities.

However, everything must begin with an understanding of the community itself, and, in many ways, coming together to see the community anew. This becomes possible through “action research” (also known as “participatory evaluation research”), which engages community members as leaders and inquirers of the research itself.

Traditional scientific inquiry into the thoughts of people within communities will tell us valuable things about what change needs to happen and how. However, it is only through engaging in research both as and with community members that we can discover the “why” of our work: Why is the community the way it is? Why are certain solutions preferred over others? Why do people care? Why do they resist?

It is through the authentic relationships, shared power, and grassroots participation of action research that these “why” insights truly rise to the surface. This connection to the “why” lies at the heart of action research, and sets community organizing on a path for creating social change within a community.

Over time, action research instills in us a feeling of walking through the world awake, of seeing in everything an opportunity to learn and connect. It gets inside us and reveals its simplicity—that it is less a technical task and more a human act of witnessing, seeking truth, and discovering our place in the world.

About *the* Assess Phase

What It Is

Drawing from the principles of action research and popular education, the Assess phase is when the network embarks on a deliberate and structured journey of “seeing” the community anew. The initiating organizers/organization and network members articulate what the network needs to learn, collect data through a variety of assessment methods, creatively analyze all that is discovered, and ultimately organize the outcomes to define a path for social change.

Unlike most assessments—conducted as a precursor to the process itself—here the Assess phase happens as a community and plays a central role in relationship and knowledge building. Through this process, the network gains new language, skills, insights, and values for strengthening the design and implementation of solutions.

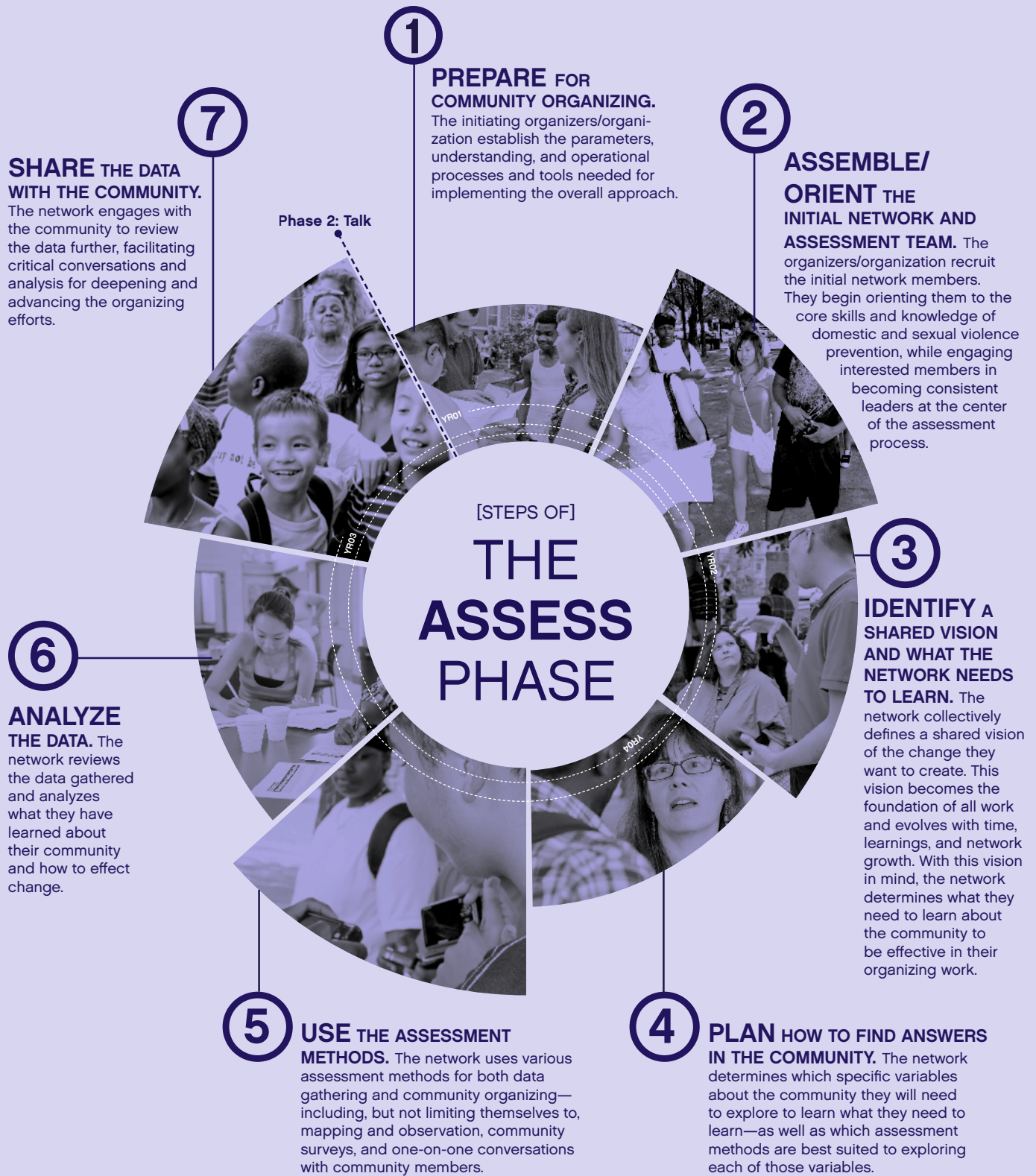
The Assess phase also includes foundational steps that the initiating organizers/organization must take for setting up the overall approach, such as budgeting, creating documentation and evaluation systems, and making preliminary decisions about geographical boundaries.

Note: The Assess phase is formally phase 1 of 4 in the Close to Home approach. However, the Close to Home approach is designed for cycling through and back to phases several times as you broaden and deepen your work in communities. In this way, the Assess phase marks the beginning of the process as well as the beginning of new cycles of the process, and remains available as a tool at any point when greater community insights would strengthen the network’s efforts.

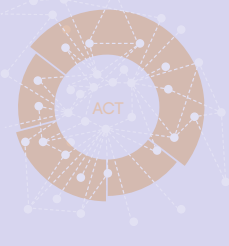
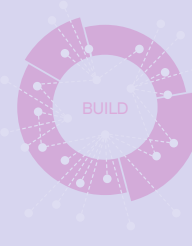
Why It’s Important

In this phase, network members engage in honoring, exploring, and documenting local knowledge—amplifying voices marginalized by services and systems being cast as the primary holders of knowledge and expertise. In the end, this phase creates the opportunity for the following:

- Thinking critically and creatively about why things are as they are and the possibilities for how things could be different
- Identifying what is powerful and effective about the community and what untapped opportunities can be built upon
- Identifying community members who can speak to the way things are, have influence, and engage others
- Deepening relationships and people’s commitment to a social change process
- Gaining a nuanced understanding of the community for designing solutions that address domestic and sexual violence



A GROWING NETWORK





Step 1:

PREPARE

for Community Organizing



What *and* Why



The Close to Home approach is about growing a network for community organizing to prevent domestic and sexual violence. As this network grows into a dynamic presence in the community, the initiating organizers/organization and varying network members remain at the network's core to manage funding, evaluation, and reporting, and to build collective responsibility for the integrity of the work.

At the start of the Assess phase, the initiating organizers/organization and any early network members converge around a shared analysis of the context for research—making foundational programmatic decisions, getting to know the community, aligning around the principles of community organizing, and working together in that spirit.

This is a time to reflect on what it means to engage with people on social justice issues. It's a time to consider how the current system is not set up in a way that promotes fairness or opportunity for all—that there is not just something wrong for the individual, but something wrong with the system as a whole. Facilitating change begins with creating alternative spaces within the community where ideas are sought and listened to, where power is offered and shared, where resources are divided equitably, and where new skills and talents are developed—while also working to change the fundamental wrongs of the system. The Assess phase becomes a first step for creating these alternative spaces for engagement.

How

The following steps can be conducted as an intensive one- or two-day retreat or over a series of team meetings with the initiating organizers/organization and possibly some initial network members.

1. Align around the principles of community organizing.

The Close to Home approach is based on a set of principles that may be different to what you have known and done in the past. Engage the network core in working through the two “Principles for Community Organizing” handouts (pages 14 and 16) in a fun, visual, and interactive way.

2. (Re)discover the community.

Next, it's time to (re)discover the community with an insider's perspective and to build some awareness for setting up the scope of the work. While you can jump ahead to “mapping and observation” on page 46 to get more ideas, don't get too detailed or make too many decisions now, as the mapping and observation phase is a key step in coming together as a network. For now, we recommend the following:

- Review “Seeing with the Ecological Model” (page 18), which lists things to observe in the community related to each sphere of influence. Gather and discuss your responses.
- Establish the community's geographic scope and size.
- Review the “Community Assets Map” (page 19) and, as a group, write down in each category the names of individuals with whom you already have connections (and note where new connections will need to be formed).
- Learn the local landscape, including the connections between various buildings, neighborhoods, and public spaces.
- Immerse yourself in local media—newspapers, websites, social media—to increase your awareness of the people, places, and issues.
- Have lots of coffee dates—identifying and building relationships with individuals whose participation in the assessment process could be instrumental to its success, taking the first steps in hearing what they think.

3. Make foundational programmatic decisions.

Review “Getting Ready for the Assess Phase” (page 20), and as a group resolve any incomplete items. Where appropriate, use what you learned about the community to inform strategic decisions (such as reassessing the geographic scope to start with or which community members to engage first, recognizing that these choices may be more intuitive for now).

4. Create documentation and evaluation tools and processes.

Documenting network activities can seem like a daunting idea at first, but groups have found it invaluable for communicating with stakeholders, advocating for community support, celebrating the scope of work completed, establishing a culture of continuous learning, tracking trends, analyzing impact, and more. Here is what we recommend:

- **Sample Internal Activity Reporting Form:** Create a simple form that enables you to track network activities with both quantitative and qualitative data (see “Sample Internal Activity Reporting Form” page 21 as a sample).
- **Performance Measurement Database:** Create a corresponding Excel spreadsheet for compiling the data from the Activity Reporting Forms to compare, evaluate, and report on network activities over time. If interested and if you have the capacity, you may choose to partner with an organizational/academic partner to set up more robust documentation systems.
- **Member Profile Form:** Create a simple form for logging network members’ names, skills, interests, availability, contact information, etc.
- **Attendance Sheet:** Create a simple form for network member sign-in at all activities.

5. Discuss roles and responsibilities within the network core.

Before the network begins to expand, it’s helpful and inspiring to understand everyone’s skills and passions so that people’s strengths and interests can be leveraged for the greatest engagement and impact.

6. Prepare for potential ethical and legal responsibilities.

Violence can happen in anyone’s life and in any space—and the network is no exception. In anticipation of people in the network experiencing/using violence, organize internal procedures and relationships with appropriate agencies to ensure your organization upholds its ethical and legal responsibilities.

Resources and Handouts

Principles for Community Organizing: Overview **p. 14**

Principles for Community Organizing: Reflection **p. 16**

Seeing with the Ecological Model **p. 18**

Community Assets Map **p. 19**

Getting Ready for the Assess Phase **p. 20**

Sample Internal Activity Reporting Form **p. 21**

Principles for Community Organizing: Overview

A Fierce Commitment to Community

We believe that community organizing is most effective when led by community members who live, work, and play in that neighborhood, town, or cultural/identity community. Others involved in the work—including the initiating organizers/organization—participate in the process first and foremost with humility, a spirit of learning, and a commitment to that community. Together, everyone sees the community as greater than the sum of its parts and shares the following qualities of heart and mind:

- Reverence, love, and esteem for the community
- Profound respect for the knowledge and wisdom that exists there
- Belief in the community's ability to be the author of its own transformation

For All Social Change

We believe in community organizing that practices a rigorous intersectional analysis. The causes of violence are rooted in the intersections of multiple forms of oppression, including racism, sexism, classism, homophobia, transphobia, ableism, and adultism. This critical understanding guides us in taking thoughtful and effective action; in connecting gender justice with racial equity; in developing a shared analysis of the root causes of domestic and sexual violence; and in advancing the transformation of the social, economic, and political systems fueling injustice—all while cultivating the compassion and action we envision.

Creative Action

We believe that it is the propositional nature of creativity—the making something, rather than only breaking something down—that defines the true spirit of this work. When community organizing is truly “creative,” community members come together to envision an alternative, an image of how things might be. Everyone not only speaks out on what must change but also creates and seizes opportunities for stepping into a new way of being. With this approach, community organizing becomes an inspired form of activism, reminding everyone that each moment is an opportunity to ACT—for people's rights and for the community imagined.

Whole Community Engagement

We believe that the most powerful community organizing engages a cross-section of the community—youth and adults, people of all genders and races—and touches all levels of the Ecological Model:

- Individuals and their internal transformation
- Social networks and the power of family/friends/neighbors
- Local organizations and the public life of neighborhoods
- Societal and governing institutions

With this broad, multi-dimensional involvement, we discover our connections to the problem and identify our roles in creating and implementing solutions.

Principles of Community Organizing: Overview (continued)

Powerful Relationships

We believe in community organizing that enables people to develop deep and supportive relationships in which they engage their strongest motivations for social change. Relationships are the glue of this work, connecting people to build power for acting individually and collectively, creating space for telling the truth about our experiences and for compassionately holding each other accountable. When this happens, authentic connection and personal transformation become the engines of social change. We begin to form meaningful relationships that extend across social barriers and even ideological differences, as we rally around a collective vision acting as our full selves.

Beloved Community

We believe in community organizing that fosters a spirit of laughter, play, joy, and love. Such a spirit begins and grows quite simply, and profoundly, through the sharing of food, art, stories, and ideas. Upon this foundation, we can live our way into creating a beloved community—honoring each other, offering a sense of belonging, taking risks and being creative, and trying new things. As we practice this new way of being together, we experience change in small moments on an intimate scale that in time extends through our social networks, neighborhood, and community. This sense of community gives us the strength for moving through the struggles, discomfort, and resistance that also live in this work. It makes room for exposing fear, shame, sadness, and conflict without judgment. A beloved community is not always uplifting and easy, but it is real and transformative.

Community Assets and Strengths

We believe in community organizing grounded in community assets and strengths. Engaging from a strengths-based perspective creates opportunities to build on powerful qualities or untapped opportunities within a community—such as cultural norms, public spaces, informal leadership, and community celebrations. Seeking out community assets can also reveal what is not always visible—networks of informal relationships, communication patterns, and the talents and skills community members can bring to the social change process. When community organizing processes work intentionally to identify and utilize strengths, they have greater cultural and social relevance and lead to lasting solutions.

Network Leadership

We believe in community organizing based on a spirit of peerness—a recognition that we are all in this together. In a network leadership model there is not a leader and follower per se. The magic is what happens in that relational space—with leadership, creativity, and action emerging from our relationships with each other. In this context, we work together to create opportunities based on what is exciting, energizing, and relevant to our lives and analysis. The options for taking action become vast, with an entire network of expertise to draw from. We roll up our sleeves and create together, engaging intuitively and experimentally as both leaders and learners. What we discover, create, and achieve is shared widely and broadly. Working in this way changes our perspectives and opens our eyes to the opportunities and relationships that immediately surround us and to what can come from joining our power and sharing our strengths.

Patience and Persistence

We believe in community organizing that supports sustained efforts over time, while honoring how emotionally challenging and risky this work can be. Shifting commonly held attitudes and behaviors is a gradual process of change rather than a one-time event—and not just a change we must seek in others but one that we must look for in ourselves. It requires redefining how we use our power, resisting dominant culture habits, and creating time and space for the emotional work that arises when we have the courage to do so. A multi-year investment allows for a phased approach that remains attentive and responsive to emerging needs in the community. It ensures time for everyone to support each other as we move through experiences of learning, building skills, and implementing solutions. Above all, a phased process keeps power in everyone's hands, as we work together to realize bold transformations for an end to violence.

Principles for Community Organizing: Reflection

Write down your thoughts about each principle.

A FIERCE COMMITMENT TO COMMUNITY		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
FOR ALL SOCIAL CHANGE		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
CREATIVE ACTION		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
WHOLE COMMUNITY ENGAGEMENT		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?

Principles of Community Organizing: Reflection (continued)

POWERFUL RELATIONSHIPS		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
BELOVED COMMUNITY		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
COMMUNITY ASSETS AND STRENGTHS		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
NETWORK LEADERSHIP		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?
PATIENCE AND PERSISTENCE		
How is this different from our past work?	What are our strengths in this area?	What may be challenging?

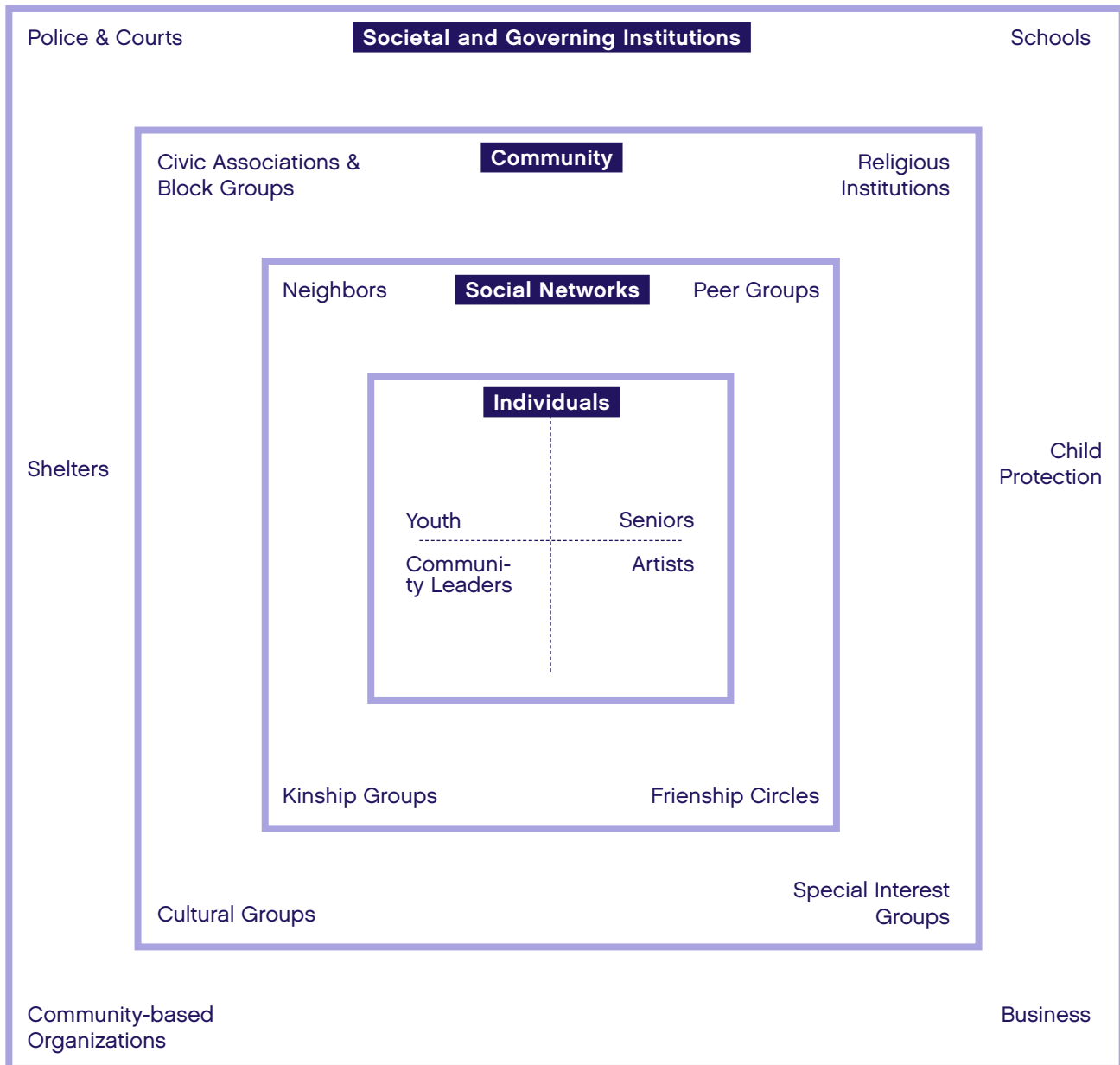
Seeing with the Ecological Model

The Close to Home approach aims to work with all parts of the Ecological Model, as listed below.

	TO OBSERVE IN THE COMMUNITY
<p>Individuals The needs, values, beliefs, and behaviors of individuals.</p>	<ul style="list-style-type: none"> • Who are our constituencies (i.e., the groups of people we want to engage)? • What are the critical places in the community where they can be found? • What are the skills and information necessary to develop an individual's ability to make change?
<p>Social Networks The family, friends, and influencers of individuals.</p>	<ul style="list-style-type: none"> • How do peer groups congregate and communicate in the community? • Who constitutes those peer groups? • How are peers, family, and friends engaged in helping to make and support change?
<p>Community The services, congregate settings, accessible role models, and community perceptions and responses to individuals.</p>	<ul style="list-style-type: none"> • What are the congregate sites within the community (i.e., the places where people gather formally, such as faith settings, and informally, such as bus stops)? • Who are the formal/informal leaders and opinion setters? • How are community groups and members involved in making change in community values, informal structures, and among community leadership?
<p>Societal and Governing Institutions The systems as well as the policies, procedures, and practices that define them.</p>	<ul style="list-style-type: none"> • What are the systems that have the greatest impact on our constituencies? • What are the ways in which these systems need to be changed and held accountable in policy and practice? • Who are our allies within these systems, and what are the points of access?

Community Assets Map

Community organizing is highly relational and begins with reaching out and calling on friends and contacts. Who do you already have a connection with in each of these categories?



Adapted from *Building Communities from the Inside Out*
by Kretzmann/McKnight, 1993

Getting Ready for the Assess Phase

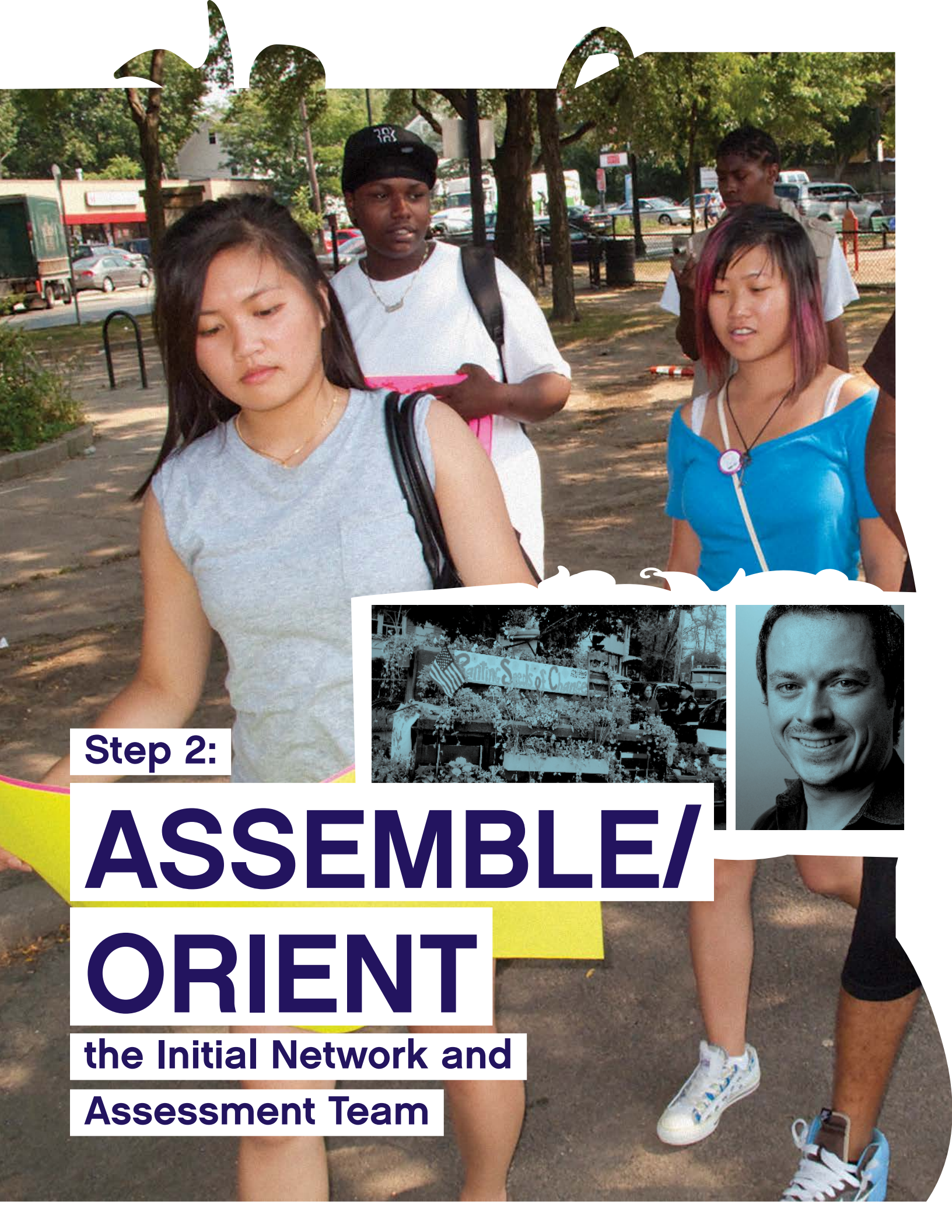
When completing this worksheet, keep in mind that some decisions will be partly intuitive at this stage and that through the assessment process you may refine and shift some of your thinking.

TASK	DONE! HERE'S THE BASICS	DONE SOON! HERE'S WHEN/ HOW
1. Of the three constituencies in the Close to Home approach (youth, adults, and civic/organizational life), which will we begin recruiting into the network first and how/when will the network engage the others?		
2. Are there any ways that we will focus who we engage—such as based on identity (ethnicity, sexual orientation), interest groups (book clubs, sports teams), etc.?		
3. What are the primary geographic area(s) of the community where we will implement the Close to Home approach, starting with the Assess phase?		
4. Have we confirmed which organizers/staff will be dedicated to this initiative and to the Assess phase?		
5. Has everyone in the network core been oriented to Close to Home's community organizing approach?		
6. Have we established a preliminary project timeline and regular meetings for the network core?		
7. Have we named the program, or do we have plans to name the program with the first network members (recommended)?		
8. Do we have funding for three to four years of programming, and have we determined our budget for the Assess phase?		
9. Are we going to generate impact data from this project? If so, how will we collect preliminary baseline data? And do we want to collaborate with a research partner for doing so?		

Sample Internal Activity Reporting Form

ACTIVITY NAME:	
RELATED PHASE:	<input type="checkbox"/> Assess <input type="checkbox"/> Talk <input type="checkbox"/> Build <input type="checkbox"/> Act
ACTIVITY TYPE:	<input type="checkbox"/> meeting/planning <input type="checkbox"/> workshop <input type="checkbox"/> event <input type="checkbox"/> assessment activity
DATE:	FACILITATED BY:
TIME:	REPORT BY:
EXPECTED # OF PARTICIPANTS:	ATTACHMENT INCLUDED: <input type="checkbox"/> Yes Name: <input type="checkbox"/> No
ACTUAL # OF PARTICIPANTS:	
LOCATION:	

OBJECTIVE
OVERVIEW
OUTCOME
NOTES / REFLECTIONS



Step 2:

ASSEMBLE/ ORIENT

**the Initial Network and
Assessment Team**

What *and* Why



In order for this to be an authentically participatory process, the initiating organizers/organization begin to recruit community members into the network immediately—specifically, community members who are passionate about or interested in ending domestic and sexual violence in their community. This step is the first of what becomes ongoing opportunities to bring people into the network—orienting and inspiring them in the Close to Home approach and the potential for social change.

Orienting new members usually happens informally and iteratively throughout the Close to Home approach, but may also take the shape of more formal workshops, where network members can build and share the core skills and knowledge for this work. Over time, this includes establishing a shared analysis of the root causes of violence, healthy relationship skills, proactive bystander skills, leadership skills, and community organizing skills (e.g., public speaking, event planning, group facilitation, etc.), as well as full immersion in the Close to Home approach (page 5) and principles (page 14).

Since the first task of the network is the action research of the Assess phase, new network members who are interested in and available for a consistent engagement have the option of joining the “assessment team.” While all variety of network members take part in assessment activities, those on the assessment team are the primary drivers of these activities, designing assessment plans and tools and managing the data.

It is important to keep the assessment team to a manageable and productive size and to have a committed group of community members who will stay involved consistently (rather than a large group that does not stay involved). Keep in mind that, in the spirit of Close to Home’s principles, it’s important to meet new network members where they are at—engaging them at the level they are most comfortable. The activities of the Assess phase can be customized to accommodate individual comfort levels, interests, and strengths.

How

The following steps can be conducted over a series of meetings.

1. Identify potential network members.

Based on what you learned through your community visits, identify community members who have shown a capacity for and interest in engaging in domestic and sexual violence prevention. In particular, consider individuals whose voice and participation would make the network's activities feel accessible to others—including people who would be influential in recruiting more community members to the network.

2. Invite community members to join the network.

Connect with the identified community members, and invite them to become part of the network. Explain the overall project and the flexibility of the network model for engaging differently over time based on one's interests and availability.

3. Orient new network members.

Meet with new network members individually or collectively to learn about their strengths, experiences, and interests and to review the Close to Home approach. Engage them in informal dialogue or in a more formal orientation session to begin introducing them to the core skills and knowledge of the work, such as the root causes of violence and the skills needed for and developed through community organizing. This may also be the time for having them complete basic paper work, such as a member profile form, photo release form, and permission forms in the case of youth (e.g., for riding in cars with staff). Ultimately, use this time to identify who among the new network members is available and interested in joining the assessment team.

4. Plan assessment team meetings and hold your first meeting.

Set up a regular meeting location and schedule for the new assessment team, as well as a clear plan for how the team will communicate between meetings. In your first meeting, we recommend doing the following:

- Create an opportunity for team members to get to know one another.
- Review and discuss the “Principles for Community Organizing” (page 14).
- Review and discuss the steps and activities of the Assess phase.
- Design an activity or discussion using the “Assessment in Everyday Life” worksheet (page 25) to make the assessment process inspiring and easy to understand. For example, you could guide the group through visualizing the steps on the worksheet as they might apply to a familiar decision—such as choosing a new career or a restaurant for dinner—and then invite reflections and insights in a group discussion.

Resources and Handouts

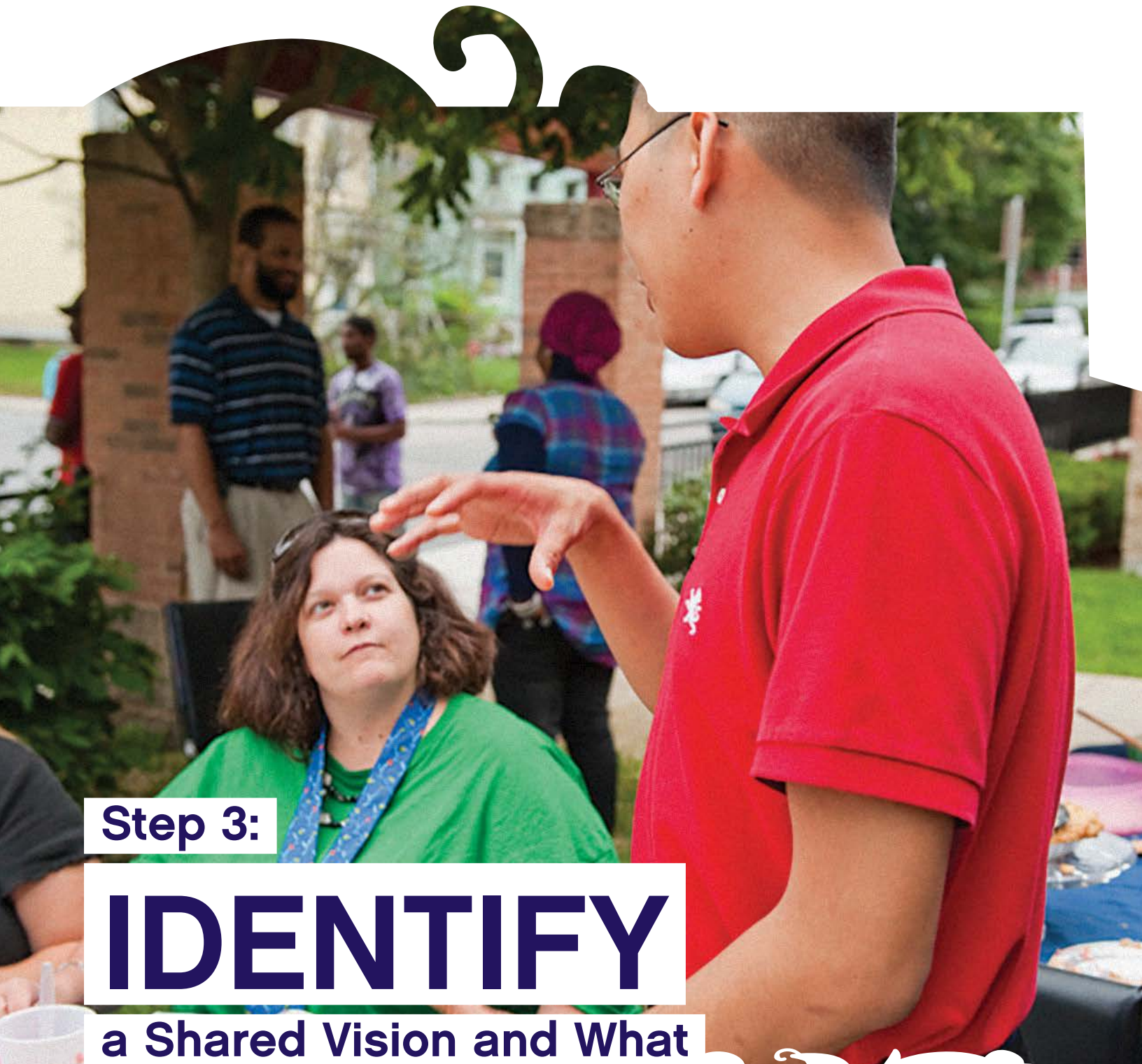
Assessment in Everyday Life p. 25

Assessment in Everyday Life

When we think about community assessment or evaluation, we often think about it in terms of researchers who want to know more about our community; or in terms of generating numbers or other information to satisfy a funder. In reality though, assessment is something that each of us uses every day in navigating our lives—whether we are making big decisions or small ones. Assessment is an intuitive and natural skill that all of us possess. We often use it unconsciously, but we can learn to use it more intentionally as we simply go about our lives or confront major issues and decisions. Here is the process of assessment we are continually cycling through, whether we notice it or not:

Everyday Assessment Steps

STEPS	WHAT WE ARE DOING
Step 1 What to do?	We identify a problem or question.
Step 2 What do we need to know?	We figure out the information or data we need to better understand the problem. Then we go about the process of gathering that data from a number of sources.
Step 3 How do we make meaning?	We analyze/consider the data to make meaning from it. Each of us processes information differently. Some of us mull it over, others pray, some go running, others make lists. Whatever our process, we let the information sink into our consciousness so we can understand the meaning of all this information in relation to ourselves and our problem/question.
Step 4 Ah-ha moments!	This is the point at which our analysis leads to clarity—to better understanding our problem/question. We all have these “ah-ha” moments, often when we least expect it. But, it does not stop here, because now we have to decide what to do with what we have understood.
Step 5 What to do? (Part 2)	We often have to gather more data to understand the options for what we can do with what we have learned. What we choose to do is greatly influenced by our culture, by our traditions or the traditions of our parents, by the conditions in which we live and the resources available to us, and by the potential consequences of our actions.
Step 6 Taking action!	To put what we have learned into practice requires support, sometimes new skills, critical thinking, and new information. When we have those things, we are ready to engage in an informed action. Our actions then lead to new questions, and we go back to Step 1.



Step 3:

IDENTIFY

**a Shared Vision and What
the Network Needs to Learn**



What *and* Why



The Assess phase is not simply about gathering data on people’s thoughts and experiences regarding domestic and sexual violence, and other community issues. It’s about gathering all the insights the network needs for knowing how to mobilize people in leading change (e.g., from learning what motivates people to whom they confide in most).

Before developing data collection tools, the emerging network must, therefore, come together around a shared vision of the change it is seeking to create. This vision becomes the underpinning of the entire approach—guiding practice, motivating the network, and symbolizing the purpose and meaning of the work. Once the vision is clear and held in everyone’s hearts and minds, the network can determine what it needs to learn to organize others in creating that vision. What the network needs to learn is called its “learning questions.”

Learning questions are the questions you want to be able to answer once all the analyzed data is laid out before you. They are high-level questions that help you figure out what data you need to collect. For example, they are not the questions you put in a survey, but rather they help you choose the survey questions that will bring the most valuable insights.

A learning question may be, “Which barriers would most likely prevent people from engaging in the network?” This learning question could inspire you to create data collection tools that explore not only people’s perceptions of those barriers but also community values, transportation/logistics, typical employment schedules, etc. In this way, learning questions are the initial points of inspiration for what becomes a generative and creative process of discovery.

By having network members determining these learning questions together, as well as designing the tools and executing the plans for finding the answers, the community becomes both the holder and seeker of knowledge, ensuring that social change is evolved from within the community rather than imposed from the outside.

How

The following steps lay the foundation for the Assess phase and involve often new, technical skills for network members. Therefore, we have attached a sample facilitator's guide for how you might work through these steps with your team (see "Sample Facilitator's Guide: Identifying Learning Questions" on page 30).

1. Create a shared understanding of learning questions.

Before doing this foundational work, it is helpful to first ensure a shared understanding of the basic concept of learning questions, using the "What and Why" above.

2. Come together around a shared vision.

Before creating learning questions, the network must develop a shared vision of the community organizing and change it seeks to create. This vision will grow over time as it is shared and evolved by new network members. It will become the foundation of all the work, in all phases of the approach, and so this discussion should take place in comfort, with lots of time, laughter, creativity, food, and togetherness. Choose a simple way to capture what the group comes up with—something open and flexible, such as a drawing or a flipchart filled with keywords. Keep this for reference and as a visual reminder throughout the process!

3. Review the foundational learning questions and understand their shared qualities.

Once the group is feeling inspired and unified by the vision, they turn their attention to considering what they will need to learn about the community itself to realize that vision. Distribute "Close to Home's Foundational Learning Questions" and "Tips for Creating Learning Questions" (page 33 and 34). If this is the first cycle of the approach, explain that the foundational learning questions are recommended for all groups and are likely enough to start, but that the "Tips for Creating Learning Questions" is still helpful for understanding how these questions were created. If this is a subsequent cycle of the approach, review the learning questions previously used and draw upon these handouts to get the group thinking about what they need and want to learn about next. For immediate reference, the foundational learning questions are the following:

- Who is the community? Who works/lives there, what are common identities (e.g., ethnicity, age, sexual orientation), etc.?
- What would motivate and/or prevent community members from getting involved in our prevention efforts?
- What exists already in the community that we could use to conduct or strengthen our work—formal/informal leaders; current community priorities; unique people and places; local talents and interests; where people gather, celebrate, make decisions, and share information; etc.?
- What are current attitudes and actions related to domestic and sexual violence?

Note: Steps 4 to 6 below guide you through writing additional learning questions. In your first cycle of the approach, only create additional questions if they feel critical to the start of your community organizing process. Otherwise, these steps can be saved for subsequent cycles of the approach.

4. Generate additional learning questions.

At various stages of the Close to Home approach, the network will need to create learning questions customized to the community and context. To do this, it is helpful to first brainstorm a long list of possible questions as a group, and then to refine this list into a smaller selection for discussion. Prompts for generating learning questions can be found in “Tips for Creating Learning Questions” (page 34).

5. Connect the learning questions to opportunities for community organizing.

Network members may be understanding the proposed learning questions differently. It is helpful to share perspectives about how finding the answer to various learning questions would guide and strengthen the community organizing work.

6. Choose your learning questions through a network vote.

Use a voting process or another decision-making process of your choice to select the learning questions you will work with. It is best to keep your final list of learning questions to a minimum so that the data collection process is manageable. We recommend working with a maximum of five learning questions at any one time. Keep a list of your learning questions for reference throughout the process!

Resources and Handouts

Sample Facilitator’s Guide:
Identifying Learning Questions **p.30**

Close to Home’s Foundational
Learning Questions **p.33**

Tips for Creating
Learning Questions **p.34**

Sample Facilitator's Guide: Identifying Learning Questions

Time

2 hrs (if you are only using the foundational learning questions, then you will likely only require 1 hr and 15 min)

Objective

By the end of this meeting the group will have identified the learning questions that will guide data collection.

Steps

1. Check-In (10 min)

2. Icebreaker (10 min)

Divide participants into groups of two or four to discuss their answers to the following questions:

- What makes you feel a part of your community?
- What do you want to know about your community?
- What part of your community do you think could improve?
- What parts of your community do you think are fine the way they are?
- What part of your community would you want to share with someone else?
- Tell about a time when someone in your community made you angry. How did you deal with the anger?
- What is the greatest lesson your community has taught you?
- Does your community support or condone certain behavior?
- Are there secret or unsaid rules of your community?
- Are there topics that can't be talked about?

Gather participants to discuss their experience. Explain that this exercise gets you thinking about your community and how the different aspects of it affect your view the world and normalize certain social behaviors.

3. Envisioning Success (25 min)

- a. Provide participants with art supplies, including paper, markers, pencils, clay or other three-dimensional materials. Ask them to complete the next activity using any of these materials in any way they would like.
- b. Ask participants to envision what their community would look like if people were taking action to prevent and respond to domestic and sexual violence and/or what their community would look like beyond the end of violence. Tell participants that they will have 15 minutes to create their visions. Ask everyone to be prepared to share back.
- c. After 15 minutes, ask participants to share their creations and to discuss what elements in the community created that success. Facilitate conversation and record their answers on a flipchart. If time permits, move beyond discussing "what" created the success to "how" the network could be a catalyst for this type of action.

Sample Facilitator's Guide: Identifying Learning Questions (continued)

d. Write everyone's ideas on a flipchart, and engage the group in identifying where their individual ideas are intersecting to create a shared vision. Choose a simple way to capture that shared vision—something open and flexible, such as a drawing or a flipchart filled with keywords. Keep this for reference and as a visual reminder throughout the process!

e. Explain that these ideas provide a starting vision for the group, which will grow over time as it is shared and evolved with new network members.

4. Reviewing/Selecting Learning Questions (1 hr 5 min)**a. Introduce learning questions and their purpose: (10 min)**

- i. Explain that the Assess phase is for learning things about the community that will help us know how to engage people to create this vision.
- ii. Explain that what the network needs to learn is called its “learning questions.”
- iii. Explain that learning questions are the questions they want to be able to answer once all the analyzed data is laid out before them. They are high-level questions that will help them figure out what data to collect in the community. For example, they are not the questions you put in a survey, but rather they help you choose the questions for the survey.

b. Post a flipchart with the following content, and distribute the corresponding “Close to Home's Foundational Learning Questions” worksheet (page 33):***Foundational Learning Questions***

Who is the community? Who works/lives there, what are common identities (e.g., ethnicity, age, sexual orientation), etc.?

What would motivate and/or prevent community members from getting involved in our prevention efforts?

What exists already in the community that we could use to conduct or strengthen our work—formal/informal leaders; unique people and places; local talents and interests; where people gather, celebrate, make decisions, and share information; etc.?

What are current attitudes and actions related to domestic and sexual violence?

c. Review the foundational learning questions: (10 min)

- i. If this is the first cycle of the approach, explain that the foundational learning questions are recommended for all groups and are likely enough to start. Review the shared qualities of these questions by distributing and discussing the “Tips for Creating Learning Questions” (page 34) in a fun, visual, and interactive way—specifically the section on “Qualities of a Learning Question.”

Sample Facilitator's Guide: Identifying Learning Questions (continued)

- ii. If this is a subsequent cycle of the approach, review the learning questions previously used and draw upon these handouts to get the group thinking about what they need and want to learn about next.

Note: Steps (d) to (e) below guide you through writing additional learning questions. In your first cycle of the approach, only create additional questions if they feel critical to the start of your community organizing process. Otherwise, these steps can be saved for subsequent cycles of the approach.

d. Generate additional learning questions: (15 min)

- i. Review the second part of the “Tips for Creating Learning Questions”—specifically “Prompts for Thinking of Learning Questions.” Ask participants what questions they think they need to answer about the community in order to create the visions they imagined earlier. Use a blank flipchart to record the questions they generate.

e. Distill the list of additional learning questions: (30 min)

- i. Tell participants they will now have an opportunity to discuss the learning questions proposed by the group and to select those the group will use. **Note:** We recommend using a maximum of five learning questions at any one time.
- ii. First review all learning questions. Ensure that everyone is clear on what each question is about, and ask for clarification if needed.
- iii. Next, ask participants if it looks like any questions are duplicates (and eliminate any duplicates) and to see if any questions could be combined (and combine those).
- iv. Ask if anyone would like to strongly advocate for any particular learning questions on the list, and facilitate a discussion. Encourage participants to share how finding the answer to a particular learning question would guide and strengthen the community organizing work.
- v. Next, let participants know they will now be able to vote using stickers. Tell them that each participant has $(N/3)$ votes (the number of questions generated divided by 3). If they would like, they can use all of their votes for one question they feel strongly about, or they may distribute their votes. Pass out the stickers to the participants and allow time for voting.
- vi. Finally, share the results of the sticker vote with the team, and let them know what the final learning questions for the assessment process will be.
- vii. Keep a list of your learning questions for reference throughout the process!

5. Next Steps and Closing (10 min)

- a. Let participants know when the next meeting time will be. Explain that during the next meeting the group will explore these learning questions more deeply and discuss how various assessment methods will help them find the information they need.
- b. Ask participants to evaluate the content of the meeting.

Close to Home's Foundational Learning Questions

What to Learn When Community Organizing for Domestic and Sexual Violence Prevention

1. Who is the community? Who works/lives there, what are common identities (e.g., ethnicity, age, sexual orientation), etc.?
2. What would motivate and/or prevent community members from getting involved in our prevention efforts?
3. What exists already in the community that we could use to conduct or strengthen our work—formal/informal leaders; current community priorities; unique people and places; local talents and interests; where people gather, celebrate, make decisions, and share information; etc.?
4. What are current attitudes and actions related to domestic and sexual violence?

Tips for Creating Learning Questions

What Is a Learning Question?

Learning questions are the questions you want to be able to answer once all the analyzed data is laid out before you. They represent what you need to learn to realize your vision (e.g., a community engaged in domestic and sexual violence prevention). They are high-level questions that help you figure out what data you need to collect. For example, they are not the questions you put in a survey, but rather they help you choose the questions for the survey.

Qualities of a Learning Question

Each of your learning questions should possess ALL of the following qualities:

- The question should be complex enough to elicit rich data but should not be so complex that nobody understands it.
- The question should spark the curiosity of those collecting the data.
- The question should bring a lot of different perspectives into the mix.
- It should be possible to gather data that could answer the question.
- There should be more than one possible answer to the question (not predetermined by wording).
- The question should address issues that are useful to the organizing process.

Prompts for Thinking of Learning Questions

Learning questions are often related to people's thinking and behaviors. To help generate ideas for possible learning questions, ask yourself the following:

- What do we want to learn about what our constituency thinks, wants, or knows in relation to a particular issue?
- Do we want to know what meaning they give to a particular aspect of their lives?
- Do we want to know the frequency of particular behaviors or patterns of behaviors?
- Do we want to describe behaviors in particular settings or something about the settings themselves?



Step 4:

PLAN

**How to Find Answers in
the Community**



What *and* Why



Conducting an assessment in the community is often the first public act for the emerging network. Carefully planning how you will conduct the assessment ensures that it is not only effective in gathering the needed data but also fun and rewarding for the entire assessment team, a chance for them to strengthen their relationships with each other, and an opportunity for them to create a positive presence in and relationship with the community—ensuring the Assess phase is an act of organizing in itself.

Fostering these opportunities begins with opening up the learning questions and becoming inspired by how much there is to learn—and how many insights are right before our eyes. Opening up the learning questions is like the branching out of a tree, with each learning question inspiring variables to explore and those variables inspiring others that are all the more detailed and specific.

Opening your mind and imagination in this way allows you to see patterns and possibilities within the data you want to collect, and ensures you ultimately collect data at the level of specificity that will be the most helpful. Once you have opened up your learning questions, you can begin to identify which variables to focus on and which assessment methods are best suited to the task. This matching process lays the foundation for the research ahead.

How

The following steps summarize how to open up your learning questions and match the variables you want to explore to the various assessment methods. This is another key step in the Assess phase and often a new, technical skill for network members. Therefore, we have attached a sample facilitator's guide for how you might work through these steps with your team (see "Sample Facilitator's Guide: Opening Up Learning Questions" on page 38).

1. Create a mind map for each learning question.

For each learning question, work through the "Steps for Opening Up Learning Questions" (page 41), determining with greater and greater detail which variables to explore in your research.

2. Understand the opportunities of each assessment method.

Learn about the spectrum of assessment methods often used in action research—see "Sample Assessment Methods" (page 42). Develop a shared understanding of the three assessment methods featured in this document and the unique opportunities each offers for both gathering data and advancing community organizing—see "Assessment Methods and Community Organizing" (page 43).

3. Learn about the strengths and comforts of the assessment team.

It is important for the assessment team to feel confident and excited about the assessment methods they will be using. Take some time to discuss team members' experiences, strengths, interests, and concerns related to the assessment methods in this document and to how each is an opportunity for community organizing. Use this conversation to determine where and how additional training could be helpful. This conversation also prepares team members for working through the next step without having to worry about their own skills and reservations.

4. Match the variables you want to explore to the assessment methods best suited to the task.

Use a sorting method of your choice to identify which variables you want to explore with each assessment method. Finish with three lists, one for each assessment method—resolving any obvious redundancies while still producing detailed lists. Ensure many variables are being explored by more than one assessment method to gain multiple perspectives. Create a simple chart that shows all this at a glance, and keep it for reference throughout the process! See the "Sample Facilitator's Guide: Opening Up Learning Questions" on page 38 for ideas on how to do this.

Resources and Handouts

Sample Facilitator's Guide:
Opening Up Learning Questions **p.38**

Sample Assessment
Methods **p.42**

Steps for Opening Up
Learning Questions **p.41**

Assessment Methods and
Community Organizing **p.43**

Sample Facilitator's Guide: Opening Up Learning Questions

Time

3 hrs

Objective

By the end of this meeting the group will have opened up their learning questions and matched the variables to be explored to the various assessment methods.

Steps

1. Check-In (10 min)

2. Icebreaker (10 min)

Choose an icebreaker of your choice for relaxing and warming up the group.

3. Mind Mapping (1.5 hrs)

a. Review the learning questions: (10 min)

Review with the group the learning questions determined in Step 3 of the Assess phase. Welcome any new reflections or questions. Remind participants that the learning questions are high-level questions that point to the more specific data that needs to be gathered. Explain that in this meeting they will open up the learning questions to reach this level of detail.

b. Introduce mind mapping: (10 min)

Post three large sheets of paper/flipchart with a different learning question written at the center of each. Explain that to open up the learning questions you will use a process of mind mapping—letting the learning question, as the central idea, branch out into related information (if possible show a quick sample or visual representation of a mind map). Distribute “Steps for Opening Up Learning Questions” (page 41) and review the contents together to understand the process they will try as a group. Work through the steps using a familiar question, such as “How can I motivate my friends to come over for a dinner party?” or “What do I need to consider for planning a successful event at the local park?” After conducting the exercise, invite questions and comments.

c. Complete one to three mind maps in plenary: (30 min)

Using “Steps for Opening Up Learning Questions” (page 41), complete a mind map for one of the three learning questions posted. Let the process be fun and light, removing any pressure or sense of right/wrong answers, and instead encouraging a feeling of creativity and possibility. Spend a maximum of 10 minutes on each mind map. Repeat for the other questions as time permits.

d. BREAK (10 min)

Sample Facilitator’s Guide: Opening Up Learning Questions (continued)

e. Complete the remaining mind maps in plenary or small groups: (30 min)

If your group is small, complete the remaining mind maps together. If large, divide participants into small groups and give each group one of the remaining learning questions to mind map as a starting point for group discussion. Keep in mind that working in small groups may require more time for the meeting/session, but may also be more appropriate for the group dynamics and teambuilding needs.

4. Matching Research Variables to Assessment Methods (1 hr)

a. Review assessment methods: (10 min)

Distribute “Sample Assessment Methods” (page 42) and engage in a high-level overview of its contents in a visual and interactive way. Distribute “Assessment Methods and Community Organizing” (page 43). When reviewing this worksheet, take extra time to gather participant feedback and ideas about what it means to engage in research as an act of community organizing.

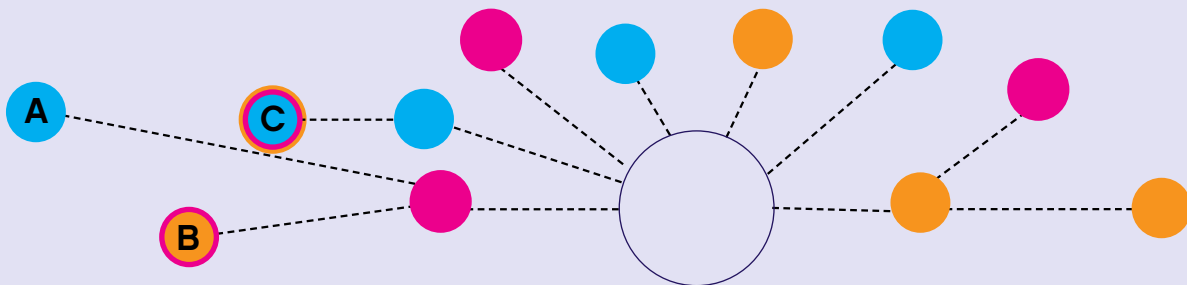
b. Learn about participants’ strengths and comforts: (10 min)

Revisit each of the three assessment methods featured in this document. Invite participants’ stories about implementing or participating in any of these methods and how each makes them feel when they imagine going out into the community. Reassure the group that while the assessment phase may challenge them in new ways, they will be trained, paired, and supported to ensure it’s a fun and rewarding experience. If any participants have discomfort with a method, do not force participation. Instead, brainstorm with them different roles they can play in the process (e.g., taking notes as an observer, providing support to teams, handing out incentives, etc.).

c. Match assessment methods to variables: (40 min)

Go back to the mind maps of your learning questions. Pick a marker color for each assessment method, then proceed to circle variables with the color that matches the most suitable assessment method(s)—based on participant guidance and leadership. Remind participants that it will be beneficial to have many variables explored by multiple assessment methods—to benefit from different vantage points.

Color coding variables



Connecting variables with methods

VARIABLES	MAPPING AND OBSERVATION	COMMUNITY SURVEYS	ONE-ON-ONES
Variable A	✓	✗	✗
Variable B	✗	✓	✓
Variable C	✓	✓	✓

Sample Facilitator's Guide: Opening Up Learning Questions (continued)

Note: Within this session or afterward, reorganize the chosen variables by assessment method. Create a clean list for each assessment method, clustering like items and removing any redundancies. Do not worry about keeping track of which learning questions are attached to which variables. Simply keep participants inspired by and focused on all that there is to learn and discover. Finish, by creating a simple chart that shows which variables are being explored by each assessment method, and keep this for reference throughout the process!

5. Next Steps and Closing (10 min)

- a. Let participants know when the next meeting time will be. Explain that at this meeting they will begin to create assessment tools.

- b. Ask participants to evaluate the content of the meeting.

Steps for Opening Up Learning Questions

We recommend using a mind-mapping approach for opening up your learning questions, allowing for a free-flowing and exploratory group process. The steps below are meant to be completed through lively, collaborative discussion and idea sharing.

STEPS

Repeat the following steps for each learning question:

1. Write your learning question in the middle of a flipchart-sized paper or larger.
2. Circle or underline all of the keywords in the learning question.
For example: What are current attitudes and actions related to domestic and sexual violence?
3. From each keyword, draw a line toward the margin of the page and write a question about what you will need to learn related to that keyword.
For example: From the word “**attitudes**” in the example above, the group may draw a line to the question, “**How do people think and feel?**”
4. Continue to draw more lines and questions to map the flow of ideas, allowing one idea to branch into another.
For example: From the word “**actions**” in the example above, the group may draw a line to the question, “**What do people say and do?**” and then a line from that question to “**Are people acting alone or with others?**” and so on.
5. If the group needs inspiration, explore each keyword starting with **What?, Who?, Where?, When?, How?** and **Why?**
6. Have fun and stop once the momentum slows and the group slips into a feeling of unity and clarity around what they will explore for that learning question. Note: As the mind map expands, the new questions generated will begin to overlap. This is a natural part of the process and should be embraced as a sign that you are reaching a good level of detail.

Sample Assessment Methods

Action research can use a wide variety of research methods. Here are some examples—some of these you will use in the Assess phase, and some others you will be invited to use in the later phases of the approach.

ASSESSMENT METHOD	TYPE OF DATA
Community Mapping / Photo Mapping	A map of the terrain and interactive patterns of a community in words and/or pictures—including transportation patterns, congregate settings, public behaviors, information sites, etc.
Ethnographic Observation	Information about how the culture of a community/group works.
Relationship Mapping	Information about relationships and patterns of relationships as they are constructed in a person's life, either by intent or by circumstance.
Questionnaires	Short, written responses from a large number of people, providing quick data about people's opinions, knowledge, and experiences related to specific issues.
Community Surveys	Verbal responses from community members about their opinions, knowledge, and experiences related to specific issues.
Interviews	A more in-depth understanding of people's relationship to a particular issue within the context of their own experiences and in their own words.
Focus Groups	Individuals' feedback and perspectives within a group context, leading to deeper discussion and illustrative interactions.
Videography	A visual or descriptive look at the issue, framing it within an environmental context.
Journaling	Feelings and ideas constructed in ways that address particular questions and draw out thinking that is not influenced by others.
Photo Journaling	A visual and accompanying story to express the ideas and meaning that people get from their relationships and surroundings.
Literature Review	Observations and statistics from existing data sets and information sources.

Assessment Methods and Community Organizing

Close to Home’s approach begins with using three key assessment methods—due to the deep insight that comes from using them in combination and how each uniquely contributes to a community organizing effort. In addition to these three methods, Close to Home also encourages networks to explore other action research methods (some of which will be also drawn upon in later phases of the approach) and to review existing research and data sets for information such as community demographics.

Assessment Methods Featured in the Close to Home Approach

METHODS	RESEARCH OPPORTUNITIES	SAMPLE DATA COLLECTED	ORGANIZING OPPORTUNITIES
Mapping / Observation	This is a combination of community mapping and ethnographic observation. It can be as simple as walking anonymously around a community, making mental observations and then writing them down from time to time—or it can be more creative and interactive, such as using photography and talking with community members.	Information about <ul style="list-style-type: none"> • public spaces • transportation • public activities • gathering patterns • rhythms of the community • social/cultural norms • public issues 	Often impromptu conversations with community members can lead to sharing information about the network’s activities—building a presence in the community, creating opportunities for people to feel seen/heard, and in some cases meeting people who would like to become involved.
Community Surveys	This method involves stopping people within their day to have them verbally answer a few simple questions, providing quick insights into their opinions, knowledge, and experiences related to specific issues.	Quick information about community members’ <ul style="list-style-type: none"> • opinions • experiences • knowledge • questions • awareness 	The fact that you are out there asking these questions sends a message to the people that this is a community issue someone cares about. The conversations and connections that result can end with an opportunity for people to sign-up for network updates.
One-on-Ones	This method involves lengthier, pre-planned conversations with community members. It includes relationship building, mutual engagement, and sometimes community members disclosing private and sensitive information.	Detailed insights into community members’ <ul style="list-style-type: none"> • knowledge of the community • fears/hopes • stories of community life • ideas for solutions 	Community members engaged in a respectful manner often finish with a strong connection to and interest in the network’s work.



Step 5:

USE

the Assessment Methods



Assessment Methods



Your assessment team is going to be successful in engaging community members fully in this process only if they are engaged themselves—feeling inspired by their roles, feeling recognized as true leaders in the process, and feeling confident in talking about the network with others.

Their confidence and passion will influence the community members they interact with during the Assess phase in particular—reassuring these community members that their voices will be heard and held in confidence (if appropriate), and that their contributions will lead to some real change.

Creating this ease and sense of agency in team members, and the resulting impact in the community, begins with the team members having been integrally involved in the process of creating and opening up the learning questions. It now continues with their full engagement and leadership in developing the assessment plans and tools and rigorously collecting and cataloguing the data.

Methods

Mapping and Observation

p.46

One-on-Ones

p.83

Community Surveys

p.65

Mapping and Observation: What *and* Why

Mapping and observation is the process of going out into the community to observe and document patterns and opportunities in the community landscape. The data you collect in this step is translated into a physical, annotated map of your community; indexes/databases of important resources and contact information; and collections of narrative and nuanced observations.

Mapping and observation provides critical value at the beginning of the Close to Home approach (and as you continue to cycle through). First, it builds a culture and practice within the network of always looking at the community anew—seeing things fresh and noticing in each detail new insights for organizing the community to lead change. Second, it helps the network develop a shared understanding and language for talking about and planning work in the community. For example, it gathers critical information about people, public spaces, transportation, and more that may influence how you use the other assessment tools. Third, it provides insight into the variables that you matched to mapping and observation when you opened up your learning questions.

This preliminary mapping/observation phase typically takes place over several months, and then becomes an ongoing process of learning that network members do naturally as the work continues.

How to Develop Plans and Tools *with* the Assessment Team

Steps 1 to 3 form the foundation for using mapping and observation and are often best conducted together. We have therefore provided a sample facilitator's guide for how to engage the assessment team in these preparations (see "Sample Facilitator's Guide: Preparing for Mapping/Observation" on page 51).

1. Reconnect with the basics of mapping and observation.

While everyone may feel somewhat familiar with mapping/observation at this point, it's time to revisit this method and go deeper. Come together around a shared practical understanding of mapping/observation, using "Assessment Methods and Community Organizing" (page 43) and "Tips for Mapping/Observation" (page 53) for reference. Review the contents of these handouts in a way that is fun, interactive, and visual.

2. Practice mapping and observation.

Mapping is a skill that grows with practice. Get out into the community to practice mapping/observation, so that everyone can find their own style for exploring the community and recording their experiences. Use "Categories and Prompts for Mapping/Observation" (page 54) to open everyone's mind to all the possibilities of what can be observed.

3. Develop your plan and tools.

While mapping/observation can feel natural and easy, the quality of your final results will directly reflect the quality of your planning/tools.

- Review the list of "Categories and Prompts for Mapping/Observation" (page 54)—these are things you will need to explore to create your community map and indexes. On this list, highlight or add the variables that the group matched to this assessment method when they opened up the learning questions. This becomes your complete list of what to gather through mapping and observation.
- Based on this merged/final list of variables to be explored, plan a series of mapping/observation sessions at different times of day using the "Mapping/Observation Plan" (page 58). This worksheet also includes space for planning your physical map and indexes.
- For the first mapping/observation session scheduled, have each pair/team of observers complete their own "Mapping/Observation Assessment Tool" (page 61).

4. Get permission before you go.

It is always important to approach the community with humility and respect. If you are doing institutional observations (e.g., in the local high school with youth as the observers) you will need to get permission from the administration. Transparency and honesty are always the best policy. You want people to know what you will be doing there and what you are trying to accomplish.

5. Prepare for community organizing.

Remember that every time you are out in the community is an opportunity for community organizing. Prepare all the supplies you will need for mapping and observation and for telling people about the network at the same time. Each person should bring the following:

- A completed “Mapping/Observation Assessment Tool” (page 61)
- A copy of “Tips for Mapping/Observation” (page 53)
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Pen/pencil
- Small notebook
- Cell phone
- Camera (optional: to document network members in action and to visually record observations)

6. Test and refine your tool.

While network members will complete their own assessment tools for each mapping/observation session, it is helpful to send the assessment team into the community to practice following the plan and using the tools—testing the overall template and catching challenges and questions at the start. Based on these practice sessions, you may choose to make refinements to your approach.

How to Collect and Catalogue Data *with* the Growing Network

Follow these steps when you are ready to begin mapping and observation in the community.

1. Hold training/orientations as needed for mapping and observation.

Once the assessment team has done all the preparations, it is time to engage anyone interested from the broader network in conducting the mapping and observation needed, which means new people will be joining the work on an ongoing basis. Whenever new people join the effort, we recommend having a meeting where people can learn about and practice using the tool and ask questions before heading into the community—to keep everyone on the same page as the network grows. In this orientation meeting, do the following:

- Explain the Close to Home approach, the network's shared vision, and how a network model is all about community voices and leadership.
- Review “Tips for Mapping/Observation” (page 53).
- Remind folks to enter the community as learners. The more we can put ourselves in the mindset of observation and learning, the more we can remind ourselves not to judge what we see, but only to see and note it.
- Practice by going outside and engaging everyone in mapping the area around your building.
- Support folks in completing a “Mapping/Observation Assessment Tool” (page 61) for their first mapping/observation session.

2. Follow up with network members after each mapping/observation session.

It is important to follow up immediately with everyone who goes out for a mapping/observation session—ensuring the group has an opportunity to reflect while their observations are fresh in their minds (i.e., try not to “sleep on your data”). In this follow-up meeting, do the following:

- Create time for team members to write down their thoughts and elaborate on their existing notes, providing fresh copies of the “Mapping/Observation Assessment Tool” (page 61) if needed.
- Invite them to share what they enjoyed, what was difficult, and what they learned that was new and interesting.
- Take your own debriefing notes for future reference and reflection.
- Informally begin the work of data analysis by flagging any themes that you see emerging. Look ahead to the data analysis step (page 95) for ideas on how best to do this.

3. Catalogue the data.

Follow the “Tips for Cataloguing Data” (page 64) after each mapping/observation follow-up session. Unique to mapping and observation, make copies of information that can immediately be used to start building the community map and relevant indexes/databases.

4. Begin creating your map and index.

Starting after the first mapping/observation session, begin creating your community map and relevant indexes/databases using the information being collected. Gather a group of interested network members to oversee the creation of these resources, ensuring all the relevant data is captured.

5. Follow up with interested community members.

One of the more important steps and the most easily forgotten is following up with anyone who put their name on a “Network Sign-Up Sheet,” expressing their interest in knowing more or becoming involved. Decide who will follow up and how to re-engage with these individuals.

Resources and Handouts

Sample Facilitator’s Guide:
Preparing for Mapping/
Observation **p.51**

Tips for Mapping/Observation **p.53**

Categories and Prompts
for Mapping/Observation **p.54**

Mapping/Observation Plan **p.58**

Mapping/Observation
Assessment Tool **p.61**

Network Sign-Up Sheets **p.63**

Tips for Cataloguing Data **p.64**

Sample Facilitator's Guide: Preparing for Mapping/Observation

Time

3.5 hrs (over one or two days, no breaks have been included)

Objective

By the end of this meeting the group will have prepared their plans and assessment tools for using the mapping and observation assessment method.

Steps

1. Check-In (10 min)

2. Icebreaker (10 min)

Ask participants to find a partner. Ask all partners to sit shoulder to shoulder and look in the same direction across the room. Explain that each person should write down five things they see, and then partners should compare lists. After everyone has completed the task, ask partners to raise their hand if they had all five things in common, four things in common, three, two, one, and then none. Invite reflections and insights on how this exercise illustrates the importance of looking, documenting, discussing, and not making assumptions.

3. First Steps in Mapping/Observation (1.5 hrs)

a. Introduce mapping/observation: (10 min)

- While everyone may feel somewhat familiar with mapping/observation at this point, it's time to revisit this method and go deeper. Gather participants' understandings of mapping/observation and invite contributions about how this assessment method supports community organizing. Write participants' contributions on a flipchart. Distribute "Assessment Methods and Community Organizing" (page 43) if desired.

b. Explore the possibilities: (15 min)

- Brainstorm with participants what they feel they could observe by watching a bus stop for 15 minutes. Write participants ideas on a flipchart. Then distribute "Categories and Prompts for Mapping/Observation" (page 54). Introduce the contents and give everyone a chance to review the handout. Ask participants to share examples of what intrigued and surprised them most. Write their contributions on a flipchart.

Sample Facilitator's Guide: Preparing for Mapping/Observation (continued)**c. Practice mapping/observation: (45 min)**

- Ask each participant to choose one category from “Categories and Prompts for Mapping/Observation” (page 54), and prepare to go out as a group into a nearby, active area of the community. Before going out, review the “Tips for Mapping/Observation” (page 53), and invite questions from the group. Give everyone a chance to find a partner and a notepad before leaving. (Note: If conducting this session over one day, use time here to give participants a short break.)

d. Debrief mapping/observation: (20 min)

- Upon returning from the community, invite participants to share what they learned about the community as well as about the process itself (e.g., ask questions about what they observed as well as how they managed the note-taking). Encourage open sharing without judgment.

4. Create the plan and tools (1.5 hrs)**a. Consider the research variables: (15 min)**

- Review the “Categories and Prompts for Mapping/Observation” (page 54). Explain that these are things the network will need to explore to create the community map and indexes. On this list, highlight or add the variables that the group matched to this assessment method when they opened up the learning questions. This becomes your complete list of what data to gather through mapping and observation.

b. Create the plan: (45 min)

- Distribute copies of the “Mapping/Observation Plan” (page 58). For each section of each table, conduct a brief brainstorm of ideas and inputs from the group, writing these on flipchart and then distilling these onto a replica plan that you’ve also created with flipchart. As you work, ensure priority research variables are being addressed in your plan and that the plan includes observing the same areas of the community at different times of day.

c. Create your first assessment tools: (30 min)

- Distribute copies of the “Mapping/Observation Assessment Tool” (page 61), and explain to participants how this tool will be used when they go out for mapping and observation. Ask everyone to fill out the tool for their first scheduled mapping/observation session, while you circulate and provide support. Once everyone has filled in their tool, invite further questions and comments about the tool from participants.

5. Next Steps and Closing (10 min)

- a. Let participants know when the next meeting time will be and that this meeting will be used to test their plan and tools.
- b. Ask participants to evaluate the content of the meeting.

Tips for Mapping and Observation

What is Mapping and Observation?

Mapping and observation is the process of going out into the community to observe and document patterns and opportunities in the community landscape. The information gathered directly supports community organizing and is an act of community organizing itself. In particular, mapping and observation gathers insights in the following three areas:

- **Physical Details:** What does the community comprise? (e.g., roads, transportation, neighborhoods, services, and public spaces)
- **Social Dynamics:** Who does the community comprise? (e.g., demographics, social networks, and how people interact)
- **Sense of Place:** What are the public experiences of the community? (e.g., when comparing media messages, when observing the overall feeling of a space, etc.)

Ways to Engage

- **Subtle:** Being a subtle observer who goes about their business as usual while making mental (and later physical) notes about what they are observing.
- **Obvious:** Being an obvious observer who is talking to people and letting them know what they are doing and why.
- **Collaborative:** Hanging out with other community members who know the community, asking for an insider's perspective of what they are observing.
- **By car or bus:** Driving through key areas to cover more terrain within a specific time period, with passengers as the dedicated note-takers and photographers.

Protocol

- **Be Friendly:** Let people know why you are there (if anyone asks), explaining that you are there to observe and gain a better understanding of the working of the community for part of a project you're involved in. Mention the name of your program and explain its focus on domestic and sexual violence prevention. Provide them the opportunity to sign-up for more information.
- **Travel in Twos:** Never put yourself in dangerous or compromising situations. It is best to do mapping or observation in pairs. That way you can also compare notes at the end of the session to see if you were "seeing" and experiencing similar or different things.
- **Take Notes:** Carry a small notebook to jot down your observations. Take good and complete notes at intervals during your observations (e.g., stop in a coffee shop or diner).
- **Check Your Assessment Tool:** Let yourself be surprised and learn the unexpected. At the same time, take breaks to consult your assessment tool and make sure you're not missing anything you planned to explore that day.
- **Aim for Focus and Variety:** To make rich observations, focus on observing just a few things at one time and vary the places, times of day, and ways you map and observe.
- **Use different types of gazes:** Try a soft gaze for general awareness. Try a focused gaze for noticing details.
- **Vary the Time of Day:** Map the same location at different times of day, taking note of what is the same and different.

Categories and Prompts for Mapping/Observation

The following categories and prompts can be used as a point of inspiration when thinking about how to explore chosen variables.

What to Bring

- A completed “Mapping/Observation Assessment Tool” (page 61)
- A copy of “Tips for Mapping/Observation” (page 53)
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Pen/pencil
- Small notebook
- Cell phone
- Camera (optional: to document network members in action and to visually record observations)

Physical Details

Overall Organization

- What is the physical layout of the community?
- Is it a commercial area? Residential? Both?

Housing

- What is the housing like? Single homes? Apartment buildings?
- What is the condition of the homes?
- What are the ages of the houses, what type of architecture, construction material, how many stories?
- Are there single, multifamily dwellings, mobile homes?
- Do houses have space/lawns around them? Are they well groomed?
- What is the general condition of the houses? Are there signs of disrepair?
- Are there driveways? Are there cars in the driveways?
- Are there vacant homes, or boarded up or dilapidated homes?
- Are there many houses for sale?
- Are there streetlights, sidewalks, curbs, gutters?
- Do the homes seem to have things in common? (For example, many have fences, yards, all have lawn ornaments, gardens, “keep off” signs, etc.)

Open Spaces

- Are there open spaces for the community to use? What do they look like? What is in them?
- Are the open spaces public or private?
- Are there parks? Forests? Beaches? Campgrounds? Basketball courts?
- What condition are the open spaces in? Are they well maintained? Is there a lot of garbage?
- Does it appear that community members use the open spaces?
- Are there informal or illegal spaces community members use to gather? What are they? Who uses them? What kinds of activities take place there?

Categories and Prompts for Mapping/Observation (continued)

Shopping Areas

- What kinds of stores or businesses do you see?
- Are there stores that display languages other than English? What languages?
- What kinds of businesses are there—Liquor stores? Restaurants? Corner stores? Grocery stores? Clothing stores? Check-cashing businesses?
- Who do the businesses seem to be catering to? Is it a specific community? A specific set of interests?

Schools

- What schools are located in your community?
- Who do they serve—what ages, what specific communities?
- Do the schools have other programs and activities there for the community? What kind?
- How do the schools interact with the community?

Places of Worship

- What places of worship exist in the community?
- What different religions are represented?

Service Providers / Organizations

- What kinds of organizations serve the community? What kind of work are they doing?
- community centers?
- hospitals and health centers?
- doctors' offices, health clinics, dentists' offices, chiropractors?
- alternative medicine centers (acupuncture, massage, etc.)?
- social agencies (welfare, WIC, social services)?
- senior centers?
- childcare facilities?

Public Protection

- What evidence do you see of police, fire, and emergency services?
- Are there fire hydrants?
- Do houses have security systems? Cameras?
- Where are the fire departments and police departments located?

Objects

- What objects catch your attention—both subtle and not so subtle?
- Street lights?
- Pay phones?
- Satellite dishes?
- Street signs?
- Billboards or signs advertising products? What products?
- Bilingual signs?
- Fences?
- Graffiti?
- Mailboxes?
- Murals?
- Lawn ornaments?

Categories and Prompts for Mapping/Observation (continued)

Roads and Transport

- How do people get around in the community (bus, car, train, bike, walk)?
- Are the streets and roads in good condition? Are they paved, gravel, brick, dirt?
- Is this a high-traffic area? Are speed limit signs or speed zones posted?
- Is there public transportation? How frequently?
- Are there formal bus stops or public transportation signs visible?
- Who uses the public transportation?
- What condition is the public transportation in?
- Is the public transportation accessible for people with different needs—elderly, children, disabled?
- Is there a major highway near the neighborhood? Whom does it serve?

Social Dynamics

Demographics

- What languages are spoken here?
- What racial groups do you see?
- What ethnic groups do you see?
- What are the ages of the residents you see?
- What socioeconomic groups do you see?
- What sexual orientations?
- What kind of people hang out here?
- Is there evidence of homelessness?
- What animals do you see?

Formal and Informal Leaders

- Who are the informal leaders?
- Who are the gatekeepers / opinion setters?
- Who are the leaders of public services / organizations?
- Who is linked to whom?

Activities

- What activities are people involved in?
- Is this a place where people gather? If so, what are they gathered to do?
- What spaces have lots of public traffic?
- Where else do people choose to congregate?
- Are people using public spaces (shopping centers, schools, etc.) for the use they were intended or for other activities?

Actions

- What actions do you see take place during your observations?
- Describe how people are acting—do they seem relaxed, nervous, angry, happy?

Informal Communication

- Do people seem to interact here?
- Do people greet each other?
- What is the tone of the interactions?
- Are people using non-verbal communication? What are they communicating that way?

Categories and Prompts for Mapping/Observation (continued)

Access and Outreach

- Do organizations advertise or do outreach to meet community members?
- How do police interact with the broader community and vice versa?
- Are people accessing the public/protective services available?
- Are people able to access the information/services they need?

Sense of Place

First Impressions

- Does the area or neighborhood have an identity, a name visible?
- What is the condition and appearance of public spaces?
- What are the boundaries of the neighborhood?
- How much is the community closed to the “outside world”? How much is it tied to the “outside world”?
- Use your senses—how does the space look, smell, sound?
- What spaces seem unsafe?
- What spaces seem welcoming?
- Do you notice a police presence in the neighborhood?
- Is there evidence of Neighborhood Watch programs/ Crime Watches?

Media

- Are there publications that serve the community, such as newspapers, community newsletters, church bulletins, etc.?
- Are there community radio stations, TV stations, websites?
- Are there bulletin boards in the community? What messages do they promote?
- Do these different publications serve specific groups within the community?

Time

- What is the community's relationship with time? Are people rushed, patient?
- What are the rhythms of the community over the course of the day?
- When visiting a place again at a different time of day, what similarities and differences do you notice?

Feelings

- What feelings did you sense in the space, between the people you observed?
- What did *you* feel?
- How would *you* describe the community?

Mapping/Observation Plan

Our Community Map

Determine in advance how you will build your community map, as this may influence how you collect data.

<p>PHYSICAL BOUNDARIES</p> <p>Confirm the physical boundaries of your map. These should match the geographic area where you will focus your community organizing. Mapping and observation is most effective when focused on specific neighborhoods or areas.</p>	
<p>FORMAT</p> <p>Choose the basic materials/media for the map (e.g., drawing and painting, large-scale printouts of Google maps, 3-D map, digital map, etc.).</p>	
<p>LOCATION</p> <p>Decide where the map will be stored and displayed.</p>	
<p>CODING SYSTEM</p> <p>Choose a coding method (such as different colored pushpins, stickers, etc.) for highlighting key details on your map. Then choose what you will use these to highlight/code, for example:</p> <ul style="list-style-type: none"> • informal gathering spaces • locations of community leaders • locations of potential partner organizations • etc. 	
<p>CREATIVE DOCUMENTATION</p> <p>Identify the different media/materials you can gather so that the map most effectively tells the story of the community (e.g., video, photos, artifacts, newspaper clippings, etc.)</p>	

Mapping/Observation Plan (continued)

Our Community Indexes

Determine in advance how you will build your indexes, as this may influence how you collect data.

<p>INDEX CATEGORIES</p> <p>Choose which indexes you will create. For example:</p> <ul style="list-style-type: none"> • list of informal community leaders • list of formal community leaders • list of local organizations and public services • list of schools • etc. 	
<p>INDEX FIELDS</p> <p>Choose which fields you will seek to fill for each entry. For example:</p> <ul style="list-style-type: none"> • individual/organization name • address • phone number • email • website • social media identities • etc. 	
<p>FORMAT</p> <p>Choose what format or tools will be used to create and maintain the indexes:</p> <ul style="list-style-type: none"> • Excel spreadsheet • database system • mobile app • etc. 	

Mapping/Observation Plan (continued)

Our Mapping/Observation Schedule

Choose the number of sessions, days/times, plus the priority variables that you will focus on in each session—taking into consideration the size and availability of your team.

#	DATE/TIME	TEAM MEMBERS	PRIORITY VARIABLES
1			
2			
3			
4			
5			
6			

Mapping/Observation Assessment Tool

NAME	
DATE	
TIME	
DAY OF THE WEEK	
AREAS/STREETS VISITED	
WALKING OR DRIVING	
WEATHER	
TEMPERATURE	

VARIABLE	
WHERE TO LOOK/ WHAT TO LOOK FOR	
NOTES	

Mapping/Observation Assessment Tool (continued)

VARIABLE	
WHERE TO LOOK/ WHAT TO LOOK FOR	
NOTES	

VARIABLE	
WHERE TO LOOK/ WHAT TO LOOK FOR	
NOTES	

Network Sign-Up Sheets

Copy and cut the following into individual sign-up sheets to protect the privacy of community members seeking to learn more or get involved.

DATE	
NAME	
EMAIL OR PHONE	
INTEREST	<input type="checkbox"/> I WANT TO LEARN MORE <input type="checkbox"/> I WANT TO GET INVOLVED COMMENTS:

DATE	
NAME	
EMAIL OR PHONE	
INTEREST	<input type="checkbox"/> I WANT TO LEARN MORE <input type="checkbox"/> I WANT TO GET INVOLVED COMMENTS:

Tips for Cataloguing Data

Data is only useful if carefully collected and catalogued. Here's where your best organizational skills come in handy. In many ways, cataloguing is the most important job of all, because well-organized data can be analyzed a lot better than partial or chaotic data. It is very discouraging for all involved when data is lost or misplaced. It is also confidential information, so as such, should not be left lying around. People entrust us with their piece of the truth when they participate in this process, and we must respect that responsibility. The following will ensure you catalogue data in a way that will support your efforts.

The One-Pair-of-Hands Rule

Assign one person to be responsible for all cataloguing of data. If this isn't feasible for your team, assign a small team of two or three people who can develop identical cataloguing methods and communicate regularly. This will ensure consistency in the data cataloguing procedures.

Steps for Cataloguing Data

Immediately after data is collected, the assigned person should do the following:

1. At the end of each follow-up meeting, gather the assessment tools containing team members' notes and all the data they collected. Make sure the data is complete, including names and dates, that the notes are clear and well-organized, and that all answers have been documented as completely as possible.
2. Put all these forms/notes into a single folder or envelope, marked with the date, assessment method, and location of the data collection. Note:
 - When gathering mapping and observation forms, make copies of information that can immediately be used to start building the community map and relevant indexes/databases.
 - When gathering community surveys, make plans to also enter the data into an Excel spreadsheet specially designed to catalogue all the responses by question, for easy comparison during data analysis.
3. Gather the facilitator's debriefing notes from the follow-up meeting and put them into the folder with the related forms/notes.
4. Gather any network sign-up sheets from that data collection session and place them in a separate folder.
5. Store the folders or envelopes in a file drawer or box used for this purpose only.

Community Surveys: What *and* Why

Community surveying is a process of going into a community with a fixed list of questions to verbally ask community members about their thoughts on a particular issue. For example, a group of women took to the parking lot of the local supermarket every Saturday morning for two months with a list of 10 questions people could answer off the top of their heads. These surveys gave the women a way to broach the issue of domestic violence without appearing to get “into somebody else’s business.”

Community surveying is a great way of gathering unfiltered information from a large number of people. The fact that you are out there asking these questions sends a message to people that this is a community issue someone cares about. Also, when engaging people in an anonymous survey, you can still invite them to sign-up for more information about the issue, the network’s activities, and/or how to get involved in “doing something” about domestic and sexual violence.

Note: Another popular form of surveying is the use of written questionnaires. While highly valuable for collecting statistics that get the attention of community leaders and efficiently collecting information from large numbers of people, questionnaires are not as uniquely suited to the relationship building aspect of community organizing and thus have not been included in this document.

How to Develop Plans and Tools *with* the Assessment Team

Steps 1 to 3 form the foundation for using community surveys, and are often best conducted together. We have therefore provided a sample facilitator's guide on how to engage the assessment team in these preparations (see "Sample Facilitator's Guide: Preparing for Community Surveys" on page 72).

1. Reconnect with the basics of community surveys.

Community surveying is not just a tool for gathering information. It is a tool for engaging people in conversations about domestic and sexual violence in a way that is non-threatening, for getting people talking about what they really think and feel, and for building connections/relationships with new people—which is what we want. This three-fold purpose is essential to keep top of mind as a team. (See "Assessment Methods and Community Organizing" on page 43.)

2. Practice asking questions.

Community surveys use a structured format, meaning that the same questions are asked in the same order to each person. However, the types of questions asked are different and intentional depending on the responses you want to elicit from community members. It is helpful to be aware of the different types of questions through practice and role playing before preparing your assessment tools. See "Asking Questions and Responding to Answers" (page 75).

3. Develop your plan and tools.

For each survey you choose to conduct, you will need to create a plan specifying the target audience and related survey locations, and you will need to create a single assessment tool so that everyone uses the same questions. To do these preparations requires the following:

- Revisit the list of variables matched to this assessment method—including why these variables are important and what types of insights they may provide. Plan for short and simple surveys. If you have lots of variables to explore, choose the most important for your first survey. Then, after learning from that experience, repeat the process to develop a second survey.
- Create your "Community Survey Plan" (page 77) for your first survey. Based on the variables you want to explore, identify the audience, topic, and the surveying location and schedule. Choose dates/times/locations where there is decent foot traffic by your audience, yet where it's not so busy that your audience won't have time to stop and not so loud that you won't be able to hear them. Create survey teams so people can work in pairs or small groups.

- Now, for the same survey, create your “Community Survey Assessment Tool” (page 78), including the “rap” you will use to engage people, the questions you will ask, and the demographic data you will collect (if any). Crafting survey questions is a detailed and iterative process of drafting, reflecting, testing, and revising. Use the “Tips for Creating Community Surveys” (page 80) to support team members in this process.

4. Ask permission in advance.

Wherever you choose as your location, make sure you ask permission for your group to do surveys. Some businesses and other establishments do not allow groups to solicit their customers.

5. Organize incentives.

Using incentives that promote nearby businesses/establishments can get you the permission you need and attract people to take the survey. For example, we once bought a bunch of iced coffee coupons at a discount from a local coffee shop, and they allowed us to stand outside and survey as a way to promote local business.

6. Prepare for community organizing.

Remember that every time you are out in the community is an opportunity for community organizing. Community surveys are the most publically visible of the three assessment methods featured in the Close to Home approach, and central for beginning to establish a community presence. Prepare all the supplies you will need for conducting the surveys as well as for telling people about the network at the same time. When conducting surveys, network members should have with them:

- Multiple copies of the “Community Survey Assessment Tool” (page 78) for each survey team, attached to clipboards
- A copy of “Tips for Conducting Community Surveys” (page 82).
- Identification to wear in public
- Pen/pencil
- Incentives for community members (if applicable)
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Cell phone

7. Practice using your survey tool.

Since surveying is more interactive than community mapping, extra practice using the tool is a good idea. Review the “Tips for Conducting Community Surveys” (page 82) with the assessment team in a fun and visual way, and then ask everyone to get into partners to practice using the “Community Survey Assessment Tool” (page 78) you have created. Encourage partners to act as both easy and difficult respondents, putting each other in different situations to experience among friends before going out in public. Also, ensure everyone is practicing listening and writing at the same time. Leave lots of time to discuss people’s feelings and experiences during this exercise. Toward the end, encourage everyone to take the tool home to practice with family and friends.

8. Refine your survey tool.

After some practice, your questions will likely need some refinements, and you will want to refine the questions before beginning to formally collect data. Once the tool is brought into the community, it can no longer be changed—consistency is key to ensuring quality data collection and analysis. To refine your questions, come together during and after your practice sessions to make adjustments based on a review of the following:

- Do the questions follow the guidelines for “Writing and Refining Your Survey Questions” as seen in “Tips for Creating Community Surveys” (page 80)?
- Is there enough room on the form to write a response?
- Is it easy to flip between the pages (if there are multiple)?
- Are the surveyors comfortable asking the questions?

How to Collect and Catalogue Data *with* the Growing Network

Follow these steps when you are ready to begin conducting your survey in the community.

1. Hold training/orientations as needed for community surveying.

Once the assessment team has done all the preparations, it is time to engage anyone interested from the broader network in conducting the community survey created, which means new people will be joining the work on an ongoing basis. Whenever new people join the effort, we recommend having a meeting where people can learn about and practice using the tool and ask questions before heading into the community—to keep everyone on the same page as the network grows. Here's a list of things you can do at this meeting:

- Explain the Close to Home approach, the network's shared vision, and how a network model is all about community voices and leadership.
- Explain community surveying and its dual purpose for gathering data and community organizing. Distribute “Assessment Methods and Community Organizing” (page 43) if desired.
- Share the “Community Survey Tool” and explain how it was developed. Review the questions and take feedback seriously, but also talk about the importance of consistency with the tools, and ask surveyors to try it as it is.
- Share “Tips for Conducting Community Surveys” (page 82) and create an opportunity for role playing with the tool and sharing experiences.
- Discuss alternative support roles that team members can play if they do not feel comfortable speaking directly with community members.

2. Define success before you leave.

Surveying can be challenging and filled with rejection from uninterested community members. The most important thing to do as a team is to set yourself up for success and prepare yourself for failure. Before you depart each day, decide what will define success:

- Will the number of surveys completed define success?
- Will something new learned about community perceptions define success?
- Will it be recruiting new volunteers?
- Will it be having a good time as a group?

Choose something as a group that feels VERY achievable. Our first time surveying, the goal was for each person to complete two surveys. When we sat down to celebrate and debrief, folks had six or seven a piece! They were even more excited about this because we had set the bar so low. The energy and excitement was palpable and left them looking forward to the next time we would go surveying. Just in case the surveying doesn't go well, make plans in advance to have your follow-up meeting over pizza or another favorite food that will bring the team together and lift

their spirits. Also, consider tailoring individual roles in advance as another way to set people up for success—inviting those uncomfortable conducting surveys to play support roles, such as passing out incentives, documenting trends and other observations, fetching snacks and supplies as needed, etc.

3. Check-in during community surveying.

If you are able to, it is a good idea to check-in with others throughout the surveying process. If surveyors are struggling and feeling discouraged because of a lack of participation, a difficult conversation with a community member, or something else going on, they might need to take a break or stop for the day. Let your group know that it is important to you and to the group as a whole that everyone takes care of themselves throughout this process.

4. Follow up with network members after community surveying.

Debriefing together immediately after surveying is a good way to ensure that everyone takes time to reconnect and support one another, especially if groups are spread out or if the surveying didn't go as well as hoped. As mentioned in (2) above, since surveying can be challenging, it's great to plan a follow-up over pizza and some other favorite food, as a way to celebrate the effort regardless of the results—either back at home base or out at a local café or restaurant. As you eat and reconnect, you can discuss and learn from the day, making your own debriefing notes from people's comments as you ask the following questions:

- How did it go?
- What is something you learned or were surprised by?
- What did you hear that you expected?
- Were there particular questions that didn't work?
- How many people gave their contact information?
- What would you do differently next time?
- Would you do this again?
- If the group encountered big challenges, troubleshoot as a team: Was it the wrong location? A rushed time of day?
- Did you notice any themes or patterns already emerging in people's responses? (This last question is particularly helpful for getting an informal head start on data analysis. Look ahead to the details on analyzing the data (page 95) for ideas of what to look for.)

Important: At the follow-up meeting, have extra copies of the survey for people to rewrite the survey responses they collected so that everything is clear and captured.

5. Catalogue the data.

Follow the “Tips for Cataloguing Data” (page 64) after each survey session. Unique to community surveys, make plans to also enter the data into an Excel spreadsheet specially designed to catalogue all the responses for each question, for easy comparison during data analysis.

6. Follow up with interested community members.

One of the more important steps and the most easily forgotten is following up with anyone who put their name on a “Network Sign-Up Sheet” to express their interest in knowing more or becoming involved. Decide who will follow up and ways to re-engage with these individuals.

Resources and Handouts

Sample Facilitator’s Guide:
Preparing for Community
Surveys

p.72

Asking Questions and
Responding to Answers

p.75

Community Survey Plan

p.77

Community Survey
Assessment Tool

p.78

Tips for Creating
Community Surveys

p.80

Tips for Conducting
Community Surveys

p.82

Sample Facilitator's Guide: Preparing for Community Surveys

Time

3 hrs

Note: If preparing two surveys, rather than just one, add an extra 60 minutes.

Objective

By the end of this meeting the group will have prepared their plans and assessment tools for using community surveys.

Steps

1. Check-In (10 min)

2. Icebreaker (10 min)

Ease into the gathering with a friendly, full-group discussion about personal experiences with community surveys—including ways people avoid them and positive and negative experiences taking them.

3. First Steps in Community Surveys (1 hr)

a. Introduce community surveys: (15 min)

Referring back to “Assessment Methods and Community Organizing” (page 43), reintroduce community surveys to the group. Ask participants to share whether they have ever conducted or participated in a community survey before. Gather stories and starting impressions. Write participants’ feelings about community surveys on a flipchart. Acknowledge that talking to random strangers can be really exciting for some and daunting for others—for surveyors and community members alike. Ask the group to share some ideas about what surveyors can do to improve their own experience and that of the community members they approach. Write their ideas on flipchart.

b. Role play asking questions and responding to answers: (45 min)

- i. Explain to participants that the main goal of community surveying is to talk to people, but that this is not always easy! One way to improve the community surveying experience is by being intentional about the questions you ask and how you respond to people’s answers. Distribute “Asking Questions and Responding to Answers” (page 75).
- ii. As you read through the worksheet together, ask participants to generate examples for each type of question based on the scenario of wanting to learn what kind of community fair / street party would be popular. Write their ideas on flipchart.
- iii. Ask participants to then divide into pairs and to role play this scenario using the questions generated and others of their choice. Encourage partners to vary being accommodating and difficult, sometimes asking for the surveyor’s opinion. Circulate throughout the role plays and provide support if needed. After 5 minutes ask partners to switch roles.

Sample Facilitator's Guide: Preparing for Community Surveys (continued)

- iv. After both partners have taken a turn asking questions, return to plenary and gather feedback and comments from the group about what worked and what didn't, what was challenging and what was surprising.

BREAK (10 min)**4. Create the Plan and Tools (1 hr 20 min)****a. Consider the research variables: (10 min)**

Distribute copies of the variables the group matched to this assessment method. Invite participants to review and critique this list anew—both acknowledging the value of these variables to community organizing and identifying things to add and change. Write everyone's ideas on flipchart and make any necessary changes to the list.

b. Create the plan: (30 min)

Distribute copies of the "Community Survey Plan" (page 77) and work through the sections in the following way:

- i. Explain that surveys are best kept short and focused on one topic and audience. Look back at the research variables as a group and determine whether all the variables could fit in one survey, or whether you will need to prioritize which to start with, and leave the others for a second survey once the first has been completed. To do this, you may want to first gather ideas from the group on a flipchart and then facilitate a participatory discussion of the options. This could include sorting the variables into lists that work well together, distributing the heavier questions between them, etc. Once the group has decided how to proceed, write down the name, audience, and topic of your first survey on your "Community Survey Plan."
- ii. Explain that the date, time, and location where a survey is conducted is a huge aspect of its success. This involves thinking carefully about your audience and their daily patterns/habits. There may have been insights of this type that you gathered in the mapping/observation. Where can you go (on what date and at what time) where there is decent foot traffic by your audience—yet it's not so busy that your audience won't have time to stop and not so loud that you won't be able to hear them? Brainstorm with the group, writing ideas on flipchart, distilling these into your top choices, and writing these on the plan. After this meeting you will need to get permission from these locations and possibly link these to incentives for participation (e.g., a free coffee from that coffee shop). If appropriate, have a preliminary discussion now about the possibilities for incentives.
- iii. Remind participants that conducting the survey at the ideal dates/times/locations depends on having surveyors whose schedules match. For some groups, it will be easy to immediately create a surveying schedule. For other groups, there will be more complex considerations, making it best to leave the scheduling to a later time. Either way, ask team members about their availability to start the conversation. If you proceed with full scheduling, be sure you plan for people to go out into the community in pairs or small groups. They will still conduct surveys one-on-one with community members, but will have others available for company and support.

Sample Facilitator's Guide: Preparing for Community Surveys (continued)

c. Create the assessment tool: (40 min)

- i. Distribute copies of the “Tips for Creating Community Surveys” (page 80), and review the contents together as a group in a fun, visual, and interactive way. Ask for questions and comments from participants. Next distribute copies of “Community Survey Assessment Tool” (page 78) and explain that together you will create the questions for your survey.
- ii. Post a flipchart with a sample one-line and introductory rap for your group, based on the samples in “Tips for Creating Community Surveys” (page 80). Ask your group if there is anything they would add or change.
- iii. Ask participants to take 10 minutes to think of the top three questions they would put in the survey. After 10 minutes, ask everyone to share their ideas, while you list them on flipchart. Guide the group in distilling this list into six to ten questions. If the group is getting stuck on a few questions, remind them that they will have the opportunity to test and modify the tool later.
- iv. Discuss as a group whether it would be beneficial to collect any demographic data, and if so, what.
- v. Review all the questions generated and choose together an order that would create the best flow.

5. Next Steps and Closing (10 min)

- a. Let participants know when the next meeting time will be, explaining that at the next meeting they will test and refine their survey.
- b. Ask participants to evaluate the content of the meeting.

Asking Questions and Responding to Answers

In conversation and inquiry, there is an art in what questions you ask and how you respond to people's answers. While the options and considerations are extensive, at the foundation are three types of questions and a few simple rules.

Asking Questions

TYPE OF QUESTION	EXAMPLES	USE
Closed-Ended Questions	A multiple-choice question or a simple question such as: <ul style="list-style-type: none"> • Do you like...? • Have your ever experienced...? 	<ul style="list-style-type: none"> • Typically solicits “yes/no” responses that are quick to collect and easy to compare, or a simple answer that indicates a choice among itemized options. • Helpful for ending a tangent and then bringing a conversation back on topic. • Helpful for breaking down an open-ended question (see below) that the respondent is having difficulty answering.
Open-Ended Questions	<ul style="list-style-type: none"> • How do you feel when...? • Tell me about a time when...? 	<ul style="list-style-type: none"> • Typically solicits a more elaborate response when more detailed and narrative answers are preferred. • Helpful for putting power in the respondents' hands to tell their story.
Probing Questions	A question directly related to the one you just asked, either focusing in on one aspect or a general question such as: <ul style="list-style-type: none"> • Can you tell me more about that? • What was that like for you? 	<ul style="list-style-type: none"> • Typically focuses the conversation for going deeper into a particular comment. • Useful for gaining greater clarity or insight about what the community member is saying. • Helpful for supporting a respondent in getting to the heart of their answer when they seem to be talking around what they really want to say.

Asking Questions and Responding to Answers (continued)

Responding to Answers

What do you do when you don't agree?

EXAMPLE OF WHAT NOT TO SAY	EXAMPLE OF WHAT TO SAY
Network Member: Why do you think domestic violence happens?	Network Member: Why do you think domestic violence happens?
Community Member: I think some women ask for it.	Community Member: I think some women ask for it.
Network Member: That's not true; no one deserves to be abused.	Network Member: Okay. Thank you for that response.

Why? We want to hear what people actually think and believe and not influence their next response. For example, if we hear from everyone that they think “some women ask to be abused” we might target our next media campaign around changing that belief. Thanking someone for answering a question is a simple way to respond, while neither agreeing nor disagreeing with them.

What do you do when someone asks for your opinion?

EXAMPLE OF WHAT NOT TO SAY	EXAMPLE OF WHAT TO SAY
Community Member: Are you a bunch of feminists who think it's wrong to beat women?	Community Member: Are you lot a bunch of feminists who think women are never at fault?
Network Member: Yes, and you should be too.	Network Member: We believe in letting everyone have their own beliefs. What we want to do is learn what community members REALLY think—to listen without bias. Your honest response is so helpful. Are you ready for the next question?

Why? We don't want the conversation to become about comparing and judging beliefs. We can refocus discussions by clarifying that the surveys are about hearing community voices without judgment.

Community Survey Plan

SURVEY NAME	AUDIENCE	TOPIC
SCHEDULE		
DATE	LOCATION	TEAM MEMBERS

Community Survey Assessment Tool

SURVEY NAME		
SURVEYOR / NETWORK MEMBER'S NAME		
LOCATION OF SURVEY		
TIME OF SURVEY		AM/PM
DATE OF SURVEY		

ONE-LINE "RAP" / GET THEM TO STOP:

INTRODUCTORY "RAP" / EXPLAIN AND ENGAGE:

Community Survey Assessment Tool (continued)

For each question in your survey, utilize the following structure.

QUESTION # _____
Main Question:
Responses:
Probing Questions:
Responses:

Tips for Creating Community Surveys

What Is a Community Survey?

Community surveying is a process of going into a community with a fixed list of questions to verbally ask community members about their thoughts on a particular issue. It is a great way of gathering unfiltered information from a large number of people. The fact that you are out there asking these questions sends a message to the people that this is a community issue someone cares about. Also, when engaging people in an anonymous survey, you can still invite them to sign up to get more information about the issue, the network's activities, and/or how to get involved in "doing something" about the problem.

Writing Your "Raps"

In community surveying, your first task is to get people to stop and stay. To do so, you will need two types of raps:

One-Line Rap

A one-line rap is used to get people to stop. Key components include the time commitment and an incentive.

For example: "Do you have five minutes to take a survey in exchange for a free candy bar?"

Introductory Rap

An introductory rap is used to explain what you are doing and to engage the individual—key components include the purpose of the survey and putting control in the respondent's hands.

For example: "Hi, my name is _____ and I need just five minutes of your time to ask you a few questions about your community. I am with _____, and we are part of a community initiative to prevent domestic and sexual violence. We want to include the whole community in this effort, and your opinion is really important to me. All your responses will remain anonymous. Would you mind? If at any point you feel uncomfortable answering a question, we can skip it. Okay? Thanks."

Incentives

The first example above includes mention of a candy bar. Your raps may include the offer of an incentive like this. For example, you could offer respondents an entry into a raffle, a free T-shirt, a coupon to a nearby restaurant, etc. in return for answering the questions on the survey.

Organizing Your Survey Questions

A survey should be short and simple, easy to conduct, and enjoyable for respondents. This starts by following these guidelines:

1. Ensure all surveyors use the same questions.
2. Have no more than six to ten questions on your survey, including a final question for asking if the person wants to sign-up for more information.
3. Order the questions with the easier questions first to build rapport, confidence, and trust in the respondent.

Tips for Creating Community Surveys (continued)

4. Where helpful, divide survey questions into two parts: a main question, which is a simple open- or closed-ended question, and a secondary probing question, which is a related question that helps the survey- or dig deeper into the response. For example:

Main: What do you think a person should say or do if they know someone in a domestic violence situation?

Probe: What might be difficult about that?

Writing and Refining Your Survey Questions

Survey questions should be tested with friends and family, reviewed, and refined several times before use. Each time consider the following for each question:

1. Is the question clearly stated?
2. Are we asking this question in the right language / type of language for our audience?
3. Does the question ask what we really want to learn?
4. Are there any barriers or concerns in asking the question this way?
5. Is the style of question we are asking suited to the level of detail we are seeking in the responses?
6. Is this question redundant with or too similar to another?
7. Does the wording help make the survey feel less threatening and more engaging?
8. Does the wording ensure respondents don't feel blamed, targeted, judged, victimized, or cornered into a disclosure?

Sample Survey Questions

You will want to tailor your survey questions to the audience and variables being explored. However, the following sample questions provide a guide for the lightness and openness that make for a positive and engaging process:

Main: What are some community activities that people seem to like and attend?

Probe: Are these activities you would attend?

Main: What do you think about when you hear the term domestic and sexual violence?

Probe: What does domestic and sexual violence include in your opinion?

Main: What are things that you think people could do in our community to prevent domestic and sexual violence?

Probe: What are things in the community we could draw upon to make this happen?

A Note about Demographic Questions

Sometimes asking people demographic information is a good way to start, because these are questions everyone knows the answers to (e.g., ethnicity/race, age, neighborhood of residence, educational level). Other times they may raise sensitivities from the respondent, or they may encroach on people's privacy. Sometimes it is better to ask demographic questions at the end of the survey after you have had the chance to establish a connection. Think carefully about whether demographic questions are an asset to your survey.

Tips for Conducting Community Surveys

What to Bring When Conducting Surveys

- Multiple copies of the “Community Survey Assessment Tool” (see page 78) for each survey team, attached to clipboards.
- A copy of “Tips for Conducting Community Surveys” (page 82).
- Identification to wear in public
- Incentives for community members (if applicable)
- Pen/pencil
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Cell phone

How to Ask Survey Questions

Following Good Process

- Stay focused on the person you’re surveying.
- Ask the survey questions in the order in which they appear.
- Get responses for all of the questions unless the participant does not want to answer.

Getting Responses

- Put the person you are surveying at ease, and let them know that there are no right or wrong answers.
- Ask the questions with assurance. If people feel your discomfort, they will not give good answers.
- Listen carefully. Allow people time to think and then respond.
- Ask additional probing questions if the person does not give you a full response.
- If someone says something you do not understand, ask them to explain what they mean.
- If you miss an answer, ask them to repeat it (e.g., “I want to make sure I got that, can you say it again?”)

Making a Connection

- When you are done, thank the respondent. Tell them again how their responses will be helpful in preventing domestic and sexual violence.
- Invite the respondent to complete a sign-up sheet for more information or to get involved. If they do, make sure they know the survey is confidential and that their information will be kept separately.

One-on-Ones: What *and* Why

One-on-ones (or relational meetings) are face-to-face conversations that explore deep motivations and opinions and form relationships for leading change. They are about getting to know each other, listening deeply, and bringing ones' whole self to the table. They are not meant to have an investigative tone or to act as training or education of any kind. Rather, they are a chance to learn what motivates people and to build meaningful relationships, so we can figure out how to build power to work together for social change.

One-on-ones become an excellent way to gain more detail on insights already gathered through mapping/observation and/or community surveys. They also create opportunities to meet with informal and formal leaders in the community and to explore their interest in becoming more involved with the network.

While you will use one-on-ones to specifically explore variables matched to this method in your assessment strategy, one-on-ones are most valuable when you let them also explore people's unique knowledge, perspective, passions, and motivations—for additional and unexpected learning that can enrich your research. For example, if you are meeting with someone who has lived in your community for a long time, you might want to spend more time learning about how the community has changed over time. If you are able to meet with any elected officials, you may be able to discuss legislation related to domestic and sexual violence prevention and/or other key community issues.

One-on-ones can be layered throughout the assessment process to glean insights that can enhance mapping and observation and surveys, and should also continue throughout subsequent phases of the Close to Home approach.

How to Develop Plans and Tools *with* the Assessment Team

Steps 1 to 3 form the foundation for using one-on-ones and are often best conducted together. We have therefore provided a sample facilitator's guide on how to engage the assessment team in these preparations (see "Sample Facilitator's Guide: Preparing for One-on-Ones" on page 87).

1. Reconnect with the basics of one-on-ones.

Revisit the purpose of one-on-ones (see "Assessment Tools and Community Organizing" page 43). Keep in mind that one-on-ones are more relational than investigative. They are one of the best tools for building strong relationships that can support community organizing over the long term.

2. Practice conducting one-on-ones.

Role play conducting one-on-ones, practicing the approach described in "Tips for Conducting One-on-Ones" (page 89). Learn from observing each other and discussing the possibilities.

3. Develop your plan and tools.

Together, your team will create a single plan for the one-on-ones you will conduct, but you will create separate assessment tools for each one-on-one. To do these preparations requires the following:

- Revisit the list of variables matched to this assessment method—including why these variables are important and what types of insights they may provide. Also, think about things you have learned using the other assessment methods that you would now like to explore further. Add these to the list.
- Generate a long list of people you could talk with to explore all the variables—with an understanding of the unique perspective each would bring and the variables they could speak to. Write these people's names on the "One-on-One Plan" (page 91), based on the expectation that each assessment team member will likely conduct three to five one-on-ones or more, depending on the size of your team.
- Take a preliminary look at the "Tips for Scheduling One-on-Ones" (page 94) to make decisions about who will conduct each one-on-one and how each relates to the others.
- Have assessment team members fill out a "One-on-One Assessment Tool" (page 93) for each one-on-one they will conduct, by writing down some preliminary ideas on how they will introduce themselves, start the conversation, and make a final ask.

4. Schedule your one-on-ones.

Use the “Tips for Scheduling One-on-Ones” (page 94) to organize when and how various one-on-ones will take place.

5. Practice using your one-on-one tools.

Similar to mapping/observation and community surveying, a one-on-one is an assessment method that should be practiced. Even for those who have done something similar before, it's important for everyone to feel like they are on the same page and contributing equally to the process. Allow people to pair up and practice having a conversation with one another as they would a community member, ensuring everyone has access to “Tips for Conducting One-on-Ones” (page 89). This practice time helps people feel more comfortable using the assessment tool as well as the basic techniques of one-on-ones, including the following:

- Do no more than 20% of the talking. Listen 80% of the time, while still making it a two-sided conversation.
- Keep the tone friendly and the conversation flexible.
- Probe don't pry. Always ask why.
- As the conversation approaches its end, reflect on what has been shared.
- Make an ASK that fits with what the person has shared. Create a next step.

6. Refine your one-on-one tools.

After some practice sessions, discuss as a group the challenges and strategies that people are discovering and notes they may want to add to their assessment tools. One-on-ones are free-flowing conversations that follow a broad set of principles rather than a fixed set of questions. So practice, above all, is for honing the skills that will allow network members to be spontaneous and effective in the moment. The assessment tool is intended to provide simple yet powerful cues for the network member—ideas and questions they can turn to for starting or refocusing the conversation.

7. Prepare for community organizing.

Remember that every time you are out in the community is an opportunity for community organizing. Prepare all the supplies needed for conducting the one-on-ones as well as for telling people about the network at the same time. When conducting one-on-ones, network members should have the following with them:

- A completed “One-on-One Assessment Tool” (page 93)
- A copy of “Tips for Conducting One-on-Ones” (page 89)
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Pen/pencil
- Small notebook or clipboard
- Cell phone

Note: We do not recommend that you use a tape recorder for one-on-ones, because one-on-ones are used to build relationships and sometimes the use of recording devices can get in the way of establishing trust.

How to Collect and Catalogue Data *with* the Growing Network

Follow these steps when you are ready to begin conducting your one-on-ones in the community.

1. Oversee the schedule of one-on-ones.

While it is mostly assessment team members who conduct the one-on-ones, encourage any other interested network members to get involved—partnering them with an assessment team member to build their skills and create their tools.

2. Follow up with network members after each one-on-one.

Doing follow-ups immediately after each one-on-one is also important—ensuring an opportunity to reflect while the ideas are fresh (i.e., try not to “sleep on your data”). Network members should be encouraged to take time by themselves and with their notes immediately after a one-on-one to capture anything missed and to reflect on the greater value and learning gained. In addition, there should be arrangements in place for them to meet with someone from the network core soon after the one-on-one to share what they learned, refine/improve their notes, relay any experience that might influence other one-on-ones, and plan for when they will share what they learned with the rest of the team. Also, at follow-up meetings, begin informal data analysis by discussing any themes that emerge. Look ahead to the details on analyzing data (page 95) for ideas.

3. Catalogue the data.

Follow the “Tips for Cataloguing Data” (page 64) when you conduct your follow-up meetings.

4. Follow up with interested community members.

One of the more important steps and the most easily forgotten is following up with anyone who put their name on a “Network Sign-Up Sheet” to show their interest in knowing more or becoming involved. Decide who will follow up and ways to re-connect.

Resources and Handouts

Sample Facilitator’s Guide:
Preparing for One-on-Ones **p.87**

Tips for Conducting
One-on-Ones **p.89**

One-on-One Plan **p.91**

One-on-One Assessment Tool **p.93**

Tips for Scheduling
One-on-Ones **p.94**

Sample Facilitator's Guide: Preparing for One-on-Ones

Time

3 hrs

Objective

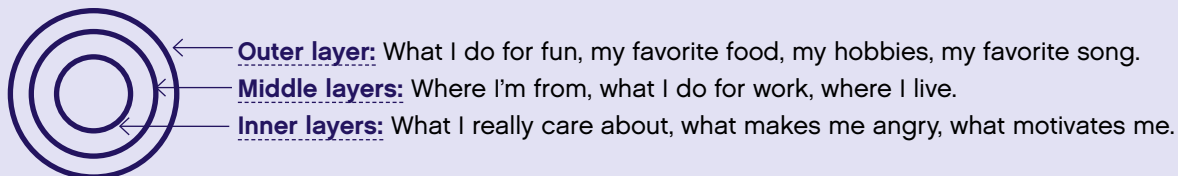
By the end of this meeting the group will have prepared their plans and assessment tools for using one-on-ones.

Steps

1. Check-In (10 min)

2. Icebreaker (10 min)

Ask participants to divide into pairs. Explain that conversations are like onions—we begin at the outer layer and move inward toward more intimate sharing, as trust builds. Ask partners to take five minutes to get to know each other better, while using questions to bring the conversation to deeper levels of sharing. Provide the following guide on a flipchart as reference:



After five minutes, ask for reflections from the group.

3. First Steps in Using One-on-Ones (1 hr)

a. Introduce one-on-ones: (15 min)

Referring back to “Assessment Methods and Community Organizing” (page 43), reintroduce one-on-ones to the group. Distribute “Tips for Conducting One-on-Ones” (page 89) and review the contents together to establish a more in-depth understanding. Ask participants to share whether they have ever conducted or participated in these types of relational meetings or something similar. Gather stories and starting impressions, while capturing participants’ contributions visually for group reflection.

b. Role play one-on-ones: (45 min)

- i. Choose a volunteer from the group. Explain that you will now conduct a sample one-on-one with this volunteer. Ask participants to take notes about what skills they notice you using in the conversation. After the role play, discuss participants’ observations.
- ii. Ask participants to find a partner for doing their own one-on-one role plays—with one person acting as a network member and the other as a community member (either speaking as themselves or in a pretend identity). Circulate throughout the role plays and provide support if needed.
- iii. After five minutes, debrief everyone’s experiences, what worked and what didn’t, what was challenging and what was surprising—for both roles. Refer back to the “Tips for Conducting One-on-

Sample Facilitator's Guide: Preparing for One-on-Ones (continued)

- Ones” to guide your questions to the group (e.g., “What was the ratio of listening to talking? etc.).
- iv. Ask everyone to find a new partner and to repeat the process playing the role opposite the one they played in the last pairing (whether that was acting as the network member conducting the one-on-one or as the community member). After five minutes, come back again to plenary for a brief discussion.

BREAK (10 min)**4. Create the Plan and Tools (1 hr 20 min)****a. Consider the research variables: (10 min)**

Distribute copies of the variables the group matched to this assessment method. Invite participants to review and critique this list anew—both acknowledging the value of these variables to community organizing and identifying things to add and change. Write everyone’s ideas on flipchart and make any necessary changes.

b. Create the plan: (30 min)

Distribute copies of the “One-on-One Plan” (page 91). Using your mapping data, brainstorm a list of people you could talk with to explore the different variables. Write these names on a flipchart. Distill this list by facilitating a discussion about the unique perspective each community member would bring and the variables each could speak to. Write your final list of names on the “One-on-One Plan” (page 91), based on the expectation that each assessment team member will likely conduct three to five one-on-ones, or more.

c. Create the assessment tool(s): (40 min)

- i. Look at the “Tips for Scheduling One-on-Ones” (page 94) to establish a shared understanding of the considerations for scheduling and to decide who will conduct each one-on-one.
- ii. Distribute the “One-on-One Assessment Tool” (page 93) and review it together. Remind participants that one-on-ones are intended to be open and free-flowing conversations, and so the tool focuses on preparing some ideas and prompts only. A scripted list of questions does not allow for the same level of rapport building.
- iii. Ask participants to complete an assessment tool for each of the one-on-ones they will be doing.
- iv. After about 10 minutes, ask everyone to share their draft questions/ideas with the group, and invite suggestions and constructive feedback.
- v. Congratulate participants for their efforts, and remind them that they will have more opportunities for practicing with and refining their tools.

5. Next Steps and Closing (10 min)

- a. Let participants know when the next meeting time will be and that at this meeting they will continue to practice their one-on-one skills, using their tool as a guide.
- b. Ask participants to evaluate the content of the meeting.

Tips for Conducting One-on-Ones

What Is a One-on-One?

A one-on-one is a face-to-face conversation in which two people develop a public relationship by sharing their stories, values, concerns, self-interests, and visions. The conversation itself is like peeling an onion, moving from superficial and rapport building information (e.g., what I do for fun, my favorite food, my hobbies, my favorite song), to basic personal information (e.g., where I'm from, what I do for work, where I live), to what lies in our hearts (e.g., what I really care about, what makes me angry, what motivates me).

A ONE-ON-ONE IS . . .	A ONE-ON-ONE IS NOT. . .
<ul style="list-style-type: none"> • 20% talking / 80% listening • Meaningful conversation • Focused on the “why” • Allows for tension (agitating but not irritating) • Creates opportunity 	<ul style="list-style-type: none"> • 50% talking / 50% listening • Chit-chat • Focused on the how/what/where • Always comfortable • Not making an ask

What to Bring to a One-on-One

- Your completed “One-on-One Assessment Tool” (page 93)
- A copy of “Tips for Conducting One-on-Ones” (page 89)
- A stack of “Network Sign-Up Sheets” (page 63)
- Organizational materials / event flyers
- Pen/pencil
- Small notebook or clipboard
- Cell phone

Note: We do not recommend that you use a tape recorder for one-on-ones, because one-on-ones are tools used to build relationships and sometimes the use of recording devices can get in the way of building trust.

What to Remember When Conducting a One-on-One

Following Good Process

- Arrive early to wherever you are meeting, and if meeting at your office, close down your other work in advance so you can move into a new mindset.
- Thank the community member right at the start for offering their time. Take a moment for some small talk and building a bit of rapport.
- Review with the community member the purpose of the one-on-one relative to the network’s activities, how long the one-on-one will take, and what will happen to the information they share.

Tips for Conducting One-on-Ones (continued)

Getting Responses

Do no more than 20% of the talking.

- Listen 80% of the time, while still making it a two-sided conversation.

Keep the tone friendly and the conversation flexible.

- Welcome tangents whenever time permits and appropriate.
- Watch the community member's body language and offer to talk about something else if they seem uncomfortable with your question.
- Be curious and respectful; ask questions to understand more and more deeply.
- Allow the community member time to think and then respond.
- If someone says something you do not understand, ask them to explain what they mean.

Probe don't pry. Always ask why. For example:

- What are some things that you see need improvement in your neighborhood/community. WHY?
- What in your life gives you a sense of meaning? WHY?
- What do you love about your community? WHY?

As the conversation approaches its end, reflect on what has been shared. Ask yourself:

- Could our organization be important/useful to this person? How?
- Does this person have a following?
- What are this person's gifts and talents?
- On what terms might this person get more involved in the organization?

Make an ASK. Create a next step. For example:

- Invite them to upcoming events/meetings.
- Ask them who else they think you should be meeting with.
- If there is an ongoing campaign/project, ask them to participate in it.

Making a Connection

- When you have used up the agreed amount of time, take a moment to let the community member choose whether they would like to extend your time together (if you too are available to do so). If the conversation goes overtime, end it gracefully at a point when insights and energy are still high but starting to taper off.
- At the end of your conversation, ask the community member if they would like to provide their contact information for more information about the network.
- Before leaving, thank them again, and tell them again how their responses will be helpful in preventing domestic and sexual violence.
- Immediately after the one-on-one is over, capture/refine your notes about all that you learned—while the conversation is fresh in your mind.
- Follow up with an email/note to thank the community member again for their time.

One-on-One Plan

Priority One-on-Ones.

#	Community Member	Unique Passions, Experiences, Perspectives	Variables to Explore
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

One-on-One Plan (continued)

Additional One-on-Ones.

#	Community Member	Unique Passions, Experiences, Perspectives	Variables to Explore
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

One-on-One Assessment Tool

NETWORK MEMBER'S NAME		
COMMUNITY MEMBER'S NAME		
LOCATION OF ONE-ON-ONE		
TIME OF ONE-ON-ONE		AM/PM
DATE OF ONE-ON-ONE		

NOTES
The community member's unique passions, experiences, perspectives:
The variables to explore:
Ideas for how to introduce myself:
Possible questions about what the person cares about:
Possible asks (e.g., "Who else can I talk to?", "Since you are an artist, would you be interested in...?"):

Tips for Scheduling One-on-Ones

Before picking up the phone and booking any one-on-ones, consider the following:

Consider timing:

Determine a timeframe for all one-on-ones based on team members' availability.

Consider who will conduct each one-on-one:

Decide which individuals will conduct each one-on-one based on what matches will create the most comfort all around and the most desirable outcomes.

Determine an appropriate length for each one-on-one:

One-on-ones are typically best when they range from 30 to 90 minutes. However, different community members will have different amounts of time to offer. Talk as a group to decide how much time feels appropriate to ask of community members.

Consider possible locations for each one-on-one:

Plan to hold your one-on-ones in locations that are convenient for all involved and quiet enough for a good conversation. If the person you are meeting with will allow you to meet at their place of business or in their home, that is a great opportunity to learn more about them and show your willingness to understand their experiences better. If your space allows it, invite them over to your organization to show them around, or meet at your office and then go out to a nearby coffee shop or restaurant.

Prepare for the little things:

One-on-ones go smoothly when you are prepared for the details.

- If you have never met the person before and are meeting somewhere like a coffee shop, how will you make sure you are able to identify one another?
- Will you exchange cell phone numbers in case someone is running late or lost?
- Are there funds available to treat them to a coffee or snack?
- Will you take notes during your conversation or just afterwards (this should be determined based on personal preference)?
- What will you do if the conversation goes on longer than you'd like?
- Will you share organizational material?
- How will you follow up after the one-on-one is completed?

Script the request:

Create a script that team members can use when booking one-on-ones, including the purpose of the one-on-one relative to the network's activities, how long the one-on-one could take, and what will happen to the information they share.

Step 6:

ANALYZE

the Data



What *and* Why



Data analysis is something you will find yourself doing naturally throughout the process—easily, playfully, and conversationally—as you instinctively notice themes and make connections. This phase is simply an opportunity for a deeper dive into all that you have learned and observed. While some patterns/themes may seem obvious already, others will only reveal themselves with a closer look.

Data analysis involves being in constant dialogue with the information you are gathering, for a dedicated period of time. You become like a miner digging for a precious mineral or an alchemist turning lead into gold. You transform the raw data into learnings that may then become enlightening for a broad range of stakeholders and participants.

The process outlined in the pages that follow is a simple approach for analyzing your data yourself. This may be all the data analysis you choose to do. If you have access to research experts or software programs for further analysis, it is important to first take this step of conducting a basic analytic process on your own, as only you understand best what it is you are trying to learn.

You may find that your internal data analysis is the most fun part of the assessment process. This is when the team gets to flex those new (or perhaps old) muscles of critical thinking, applying their experience and knowledge to consider anew those original learning questions. This is also when team members may come face to face with some of the assumptions that have been guiding their work—creating times of challenge, debate, and reflection.

How

The following steps are best conducted over a few intensive work sessions scheduled in close proximity to one another.

1. Establish a data analysis team.

Data analysis will be most effective if conducted by a small group of people, including the organizer(s)/staff who led the data collection, follow-up meetings, and cataloguing.

2. Take stock of the data you collected.

If you used all the assessment methods, you should at this point have a physical community map, a series of indexes/databases, a spreadsheet of your survey responses, and the data collection notes carefully catalogued from all three assessment methods. Take a moment to digest and celebrate what you have achieved, and then get ready to dig in.

3. Identify themes.

Working through one assessment method at a time, scan through all mapping/observation notes, surveys, and one-on-one notes looking for key themes. It may take a few passes to get clear on what themes are emerging. As you notice a theme, put a Post-It note or tab with the name of the theme in that location and add the same theme to a list of themes that you create on a separate piece of paper. Your process will be slightly different for each assessment method. For example:

- **Mapping and observation:** Look at the community map and indexes for trends, and then read through the observation notes.
- **Community surveys:** Open the Excel spreadsheet for each survey, and read through the responses question by question.
- **One-on-ones:** Read through the notes in the same free-flowing manner they were collected.

4. Refine your themes and extract learning.

Once you feel fully immersed in the materials, distill your list of themes to between four and eight themes, and refine your analysis in the following way:

- Get a pack of colored highlighters and give a color to each theme.
- Go back through the material in more detail, highlighting content related to each theme with the corresponding colored highlighter.
- Reorganize the highlighted content by theme into new documents.
- For each theme, review and distill the content into a collection of key learnings and quotes.
- As you refine your themes, check to see if there are others you may have overlooked.

5. Summarize quantifiable trends and results from surveys.

Go through all the surveys, and summarize/tally the results for each question, including the total number/percentage of people who chose a particular response in the case of closed-ended questions (e.g., with a yes/no or multiple-choice response).

6. Establish relevant demographic context.

Review any demographic data collected from specific surveys and/or from existing research. Note any possible relationships between demographics and the findings from your analysis.

7. Look for triangulation patterns.

When possible, explore closely those variables examined by multiple assessment methods, and the similarities and differences between what each assessment method revealed:

- Go back to the list of variables and identify variables for which data was collected across assessment methods.
- For each of these variables, create a new document where you can combine what was learned about that variable from each assessment method.
- As a group, compare the similarities and differences in what was discovered for that variable and draw conclusions about what new insights this comparison reveals, or what new questions this comparison raises.

8. Revisit the learning questions.

With the broader network, review your research findings formally, invite constructive questions, and together establish links between the findings and the original learning questions.

9. Document your findings in an internal report.

Create a distilled and simple report that summarizes all of the above.

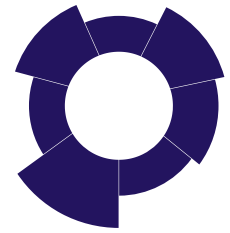


Step 7:

SHARE

**the Data with
the Community**

What *and* Why



The culmination of the Assess phase is when the network engages the broader community by exploring with them all that was learned through the data collection and analysis. This data sharing is another way to catalyze community organizing, increasing curiosity in the network’s activities and increasing interest in being part of a social change process.

It enables others to join you in seeing the community anew—reflecting on why things are as they are and the possibilities for how things could be different. It is also an opportunity for community members who took part in the data collection or who were newly recruited through that process to feel connected to their own voices and the role they can play in change.

Sharing the data with the community is both an ending and a beginning. It is a time to celebrate all that the network has achieved in the Assess phase, and by making the work visible and owned by all, it provides a glimmer of the community momentum that will build over the phases to come.

How

The following steps can be conducted over a series of meetings.

1. Decide how you will use the data to engage the broader community.

After analyzing your data, you will want to organize one or a series of community gatherings that bring people together to explore all that you have learned. The goal is to organize gatherings that are interactive and that in themselves can become an opportunity for community connection and organizing. Within these gatherings, you can present the data using flipcharts, speeches and storytelling, photomontages, PowerPoint presentations, small group discussions, and more. Decide what would work best for you and your organizing goals.

2. Make preliminary event-planning decisions.

Once you have decided the format for your community gathering(s), you can start planning the logistics and making preparations. For the logistics, the priority is to foster community participation and engagement—which means an accessible location, with room for large and small group discussions, lots of food, childcare, and transportation support. As a group, answer the following questions with this in mind:

- Who will be the team of network members taking the lead in organizing this event?
- How will additional network members be involved in a meaningful way (e.g., sharing their experience in small group discussions, leading activities, etc.)?
- What is the best time and date? Consider the people you will be inviting—is there a time of day or day of the week that will be best for them?
- Do you need to reserve a space? Can you collaborate with community partners and/or have the space donated?
- Will there be a formal agenda?
- Will there be special guests or speakers?
- Who will present the data and how? Will there be handouts?
- How will you use the gathering to create a call to action and plan the next steps in community organizing?

3. Spread the word.

Create a list of those you will invite. Be sure to invite all of the people you connected with during the assessment process. Email the invitations about three weeks in advance, with enough time for folks to put it into their calendars without having too many other conflicts. If you send a flyer invitation, make sure you include a place for a name and phone number—should people have questions or should you need an RSVP. However you reach out,

it's a great idea to include a note of explanation, stating why you are having this event, why it is important, and why you want the invitee to be there.

4. Organize lots of support for the day of the event.

Create a list of items to do “Day Of.” Some of this will look different depending on whether you are hosting the event in your own space or traveling to the venue. Here are some basics to get you started:

- Create a list of materials/supplies needed (e.g., sign-in sheet, pens/pencils, organizational materials / event flyers, food/beverages, presentation materials, audio visual equipment, etc.)
- Create a list of what needs to be set up so that it will be easy to delegate these tasks.
- If the gathering is at a location that is unfamiliar to people attending or difficult to find, prepare signs to hang that day, with arrows pointing people in the right direction.
- Prepare for having more or less people than you planned on—and for what will happen in each scenario.
- Plan for a dry run / walk-through with the volunteers who will be helping out.

5. After the gathering, do any immediate follow-up required.

Identify small and simple acts that can maintain momentum gained through these gatherings. For example, send thank yous to special guests, volunteers, and organizers, and follow up with individuals who completed a sign-up sheet.

6. End with a network celebration.

After the event, meet with the network to celebrate the work in the Assess phase and share what happened at the community event with those who were unable to attend. Together develop a plan for sharing the data with key community members who were also unable to attend.

7. Look ahead to the Talk phase.

Book your first network planning meeting for the Talk phase and publicize the time, date, and place widely.



what's next?

The Assess phase is a robust process for seeing the community anew—creating a culture of learning and observation that stays with the network. This new culture influences how you conduct network activities and participate in each moment—seeing, listening, and noticing more than before. At the same time, the research outcomes of the Assess phase become the foundation for all the work ahead.

The next phase in the Close to Home approach is the Talk phase, which is about deepening the conversations that were started in the assessment activities, bringing in new voices and perspectives, and ultimately new network members for the organizing process. But the Assess phase is far from over. You may find that some activities linger on. For example, one-on-ones often continue through all subsequent phases. Also, new learning questions may become urgent to explore, resulting in a small group of network members reengaging in the Assess phase sooner than expected. However the process evolves, the network now has a skillset and a mindset that ensures the process of change will be truly community driven and led.

To learn more go to www.c2home.org and download the following PDFs:

COMMUNITIES LEADING CHANGE: An overview of Close to Home's philosophy and practice for domestic and sexual violence prevention

> The starting point for practitioners, funders, or municipalities interested in learning more about the Close to Home approach.

THE ASSESS GUIDE: How to use action research in Close to Home's community organizing approach

> A detailed implementation guide for the first phase of the Close to Home approach, essential to ensuring the experience becomes community driven and led.

TIPS FOR PRACTITIONERS: Lessons learned from using the Close to Home approach

> Insights and learnings for all four phases of the Close to Home approach, providing practitioners with guideposts within a flexible journey of change.





The Close to Home approach engages whole communities in designing solutions and leading social change for domestic and sexual violence prevention. Go to www.c2home.org to learn more and to download these essential documents:

COMMUNITIES LEADING CHANGE:

An overview of Close to Home's philosophy and practice for domestic and sexual violence prevention

The starting point for practitioners, funders, or municipalities interested in learning more about the Close to Home approach.

THE ASSESS GUIDE:

How to use action research in Close to Home's community organizing approach

A detailed implementation guide for the first phase of the Close to Home approach, essential to ensuring the experience becomes community driven and led.

TIPS FOR PRACTITIONERS:

Lessons learned from using the Close to Home approach

Insights and learnings for all four phases of the Close to Home approach, providing practitioners with guideposts within a flexible journey of change.