Guide for

Community Assessments & Other Reports

Davis COUNTY HEALTH DEPARTMENT

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Introduction

Purpose

The purpose of this guide is to provide requirements and recommendations for conducting community assessments and other types of reports. Assessments have a specific set of rules, while reports can vary depending on the project. This document should be used as a guide in your preparation. It includes additional links to other guiding documents that should be referenced based on the scope of the work. This guide helps to standardize processes and ensure consistency in our reporting.

Using this Guide

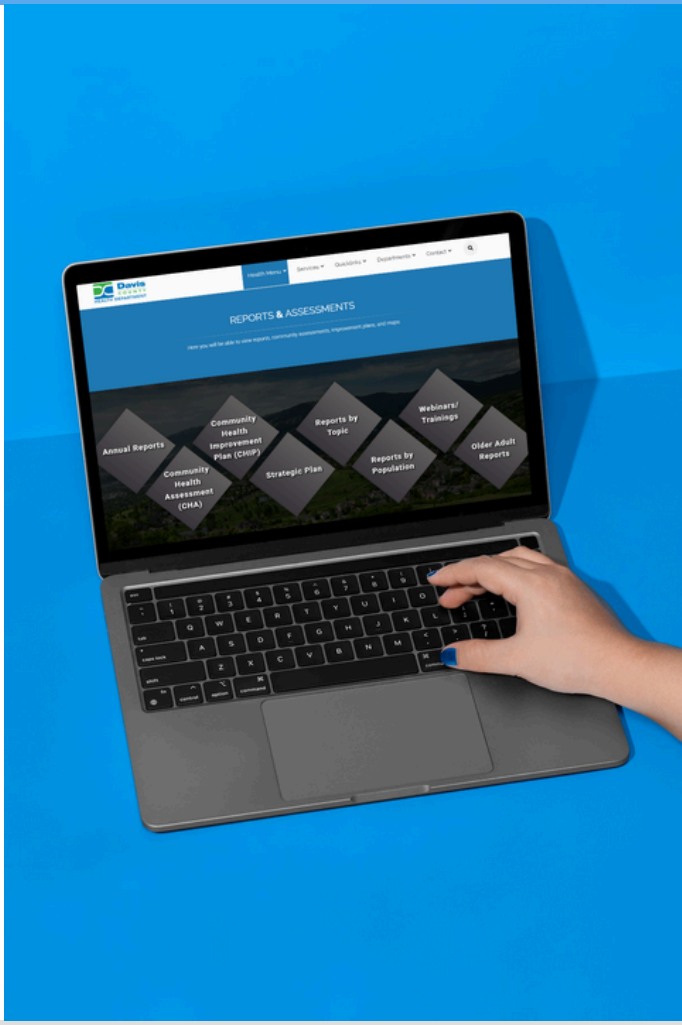
The recommendations in this guide should be considered when planning to conduct an assessment or write another type of report, but not everything will be a requirement for every project. Changing, adapting, and developing throughout the project to meet needs is okay.

Refresh Skills & Resources

DCHD Guiding Documents

When starting the assessment or reporting process, it's a good idea to review Davis County Health Department (DCHD) guiding documents. Especially consider if DCHD has done a similar assessment or report in the past.

- All public-facing reports can be found on DCHD's Reports & Assessments webpage.
- Additional guides can be found on DCHD's Health Public Google Drive:
  - Assessment Formatting and Accessibility
  - CHA How-to Guide, (based on the CHA 3.0 process) includes training links on assessment basics
  - Communications Guide
  - Community Engagement Guide
  - DCHD Brand Strategy Guide
  - DCHD Health Equity Guides
  - DCHD Logos and Templates
  - DCHD Standard Approach



Resources on the Basics of Assessment Work

- American Hospital Association Community Health Improvement Community Health Assessment Toolkit (account required)
- CDC Community Planning for Health Assessment
- County Health Rankings: Assess Needs & Resources
- Coursera Assessing and Improving Community Health
- Mobilizing for Action through Planning and Partnerships (MAPP 2.0)
- Region IV Public Health Training Center: Community Health Assessment
- University of California Los Angeles Community-Based Assessment
- University of Kansas Community Toolbox
- NAACHO Strategic Planning Guide
- Additional tools on specific topics:
  - Assessment for Advancing Community Transformation Template Tool
  - Data Across Sectors for Health Asset-Based Community Development Gathering Data Workbook
  - Data Across Sectors for Health Asset-Based Community Development Health Equity Workbook

Develop Workgroup

Forming a workgroup is an important part of assessment work. Oftentimes an already existing workgroup requests an assessment to be done. In this case, this section is still valuable to ensure you've considered all who should be involved throughout the process.

If you are doing a small report, a workgroup may not be necessary, but you should consider who will be best to help review the report, even if just one page.

A workgroup is necessary for a successful assessment and for most larger reports. When developing a workgroup, the following should be considered:

- The purpose of the assessment or report you plan to conduct
  - You will develop the official purpose once the workgroup is convened, but use an overarching purpose to develop your workgroup based on the skills, knowledge, and community connections needed
- Who should be involved and what their responsibilities will be
  - Jobs, skills, areas of expertise, and interests are all important depending on the project's purpose
  - Involve DCHD internal positions, community partners, and community members who are part of the population(s) the report includes
  - If it is a large, multi-partner, or multi-year project, creating a charter helps to set group expectations and the scope of the project
  - Subgroups or subcommittees are helpful for different phases/processes of the project

The workgroup can be adapted as you go along. A small workgroup will be needed for the methods development, but as the process evolves, more people may need to be included.

Develop Workgroup

DCHD Internal Positions

Depending on the nature of the assessment or report, it may be important to include people from specific divisions to gain different insights. Details on each of the DCHD divisions can be found in the Employee Handbook. Available division webpages are linked below:

- Administration (does not have shared webpage) is a great resource for funding and other necessary administrative duties related to an assessment where data collection is occurring.
- Communicable Disease and Epidemiology
- Community Health
- Environmental Health
- Family Health
- Senior Services

The following are part of a multidisciplinary team providing department-wide services and are **likely to be involved in, or consulted with, for all DCHD assessments:**

- **Communications**
- **Performance Management/Quality Improvement (PM/QI)**
- **Health Strategy Bureau (HSB)**

Communications

Communications is the go-to team for branding standard compliance and for helping staff get their messages shared across multiple channels, such as social media, video, print, etc. The health department's Communications Guide can be found on the intranet.

Performance Management & Quality Improvement

Assessment and evaluation play a crucial part of both performance management and quality improvement (PM/QI). The PM/QI Plan serves as the foundation and a roadmap for creating and sustaining a culture of quality at DCHD.

Health Strategy Bureau

A majority of community assessment work is done by or in collaboration with HSB. HSB leads Davis4Health, the county's health improvement collaborative, which drives community health improvement processes such as the Community Health Assessment (CHA) and Community Health Improvement Plan (CHIP).

Positions and their specialties and skills include:

Community Outreach Planner/s (COPs)

- Community health strategists
- Lead collaborations across multiple sectors
- Facilitate alignment to address the county's health improvement priorities

Epidemiologist/s

- Specialize in assessment work
- Aware of where/how to find and interpret existing data - internally and externally
- Consultants on data methods, collection, storage, analysis, and presentation/visuals

Staff filling other positions, such as Community Health Educators and Community Health Workers, may be available as funding allows.

Develop Workgroup

Community Member & Partner Involvement

Assessment is an essential function of public health and helps the community decide where and how to focus efforts. Using a collaborative process for developing community assessments is a best practice. Including community members is a means for transparency and trust in public health.

Involving the community helps bring perspective about people who face challenges that others do not and helps identify strengths, assets, and gaps. Involving community members also provides a means for better sharing of results.

- Davis4Health partners are valuable contributors for community assessments.
- Many community collaborations already exist that may have expertise for the topics and populations the assessment will address.
- Community Outreach Planners, who lead collaborations should be consulted to help identify partnerships, including with community champions and community health workers, for a successful assessment. This helps with cultural considerations and making sure the process is appropriate for diverse community members.
- DCHD staff from each division are the experts on community partners related to their work.

As previously mentioned, oftentimes the need for an assessment is identified through the community health improvement process as community members and partners discuss gaps, barriers, and needs. It is important to acknowledge how the assessment came to be (e.g., as a result of responding to a community request or need; a recommendation from a community workgroup, coalition, or advisory board; etc.).

Define Purpose

Are you doing a full assessment or another type of community report?

An assessment has specific criteria that should be met. Use the details in this section to determine if your project qualifies as an assessment or report. This determination informs which requirements need to be met and which design steps can be taken or skipped.

What are the goals of this assessment or report?

This section also outlines what to consider when **defining the focus, objectives, goals, purpose, and scope of the project.** You should have a broad understanding of this when convening the first workgroup, but establish the official purpose, goals, and objectives with those who will be involved throughout the project. This project management resource may help summarize the details of your project: Project Charter Template.

Examples of Common Davis County Community Reports

- Evaluation Summary
- Survey Results
- Progress Report
- Community Health Improvement Plan
- Population Profiles or Reports

Assessments

- Risk or Emergency Preparedness Assessment
- Community Health Assessment
- Special Topic Assessment

Define Purpose

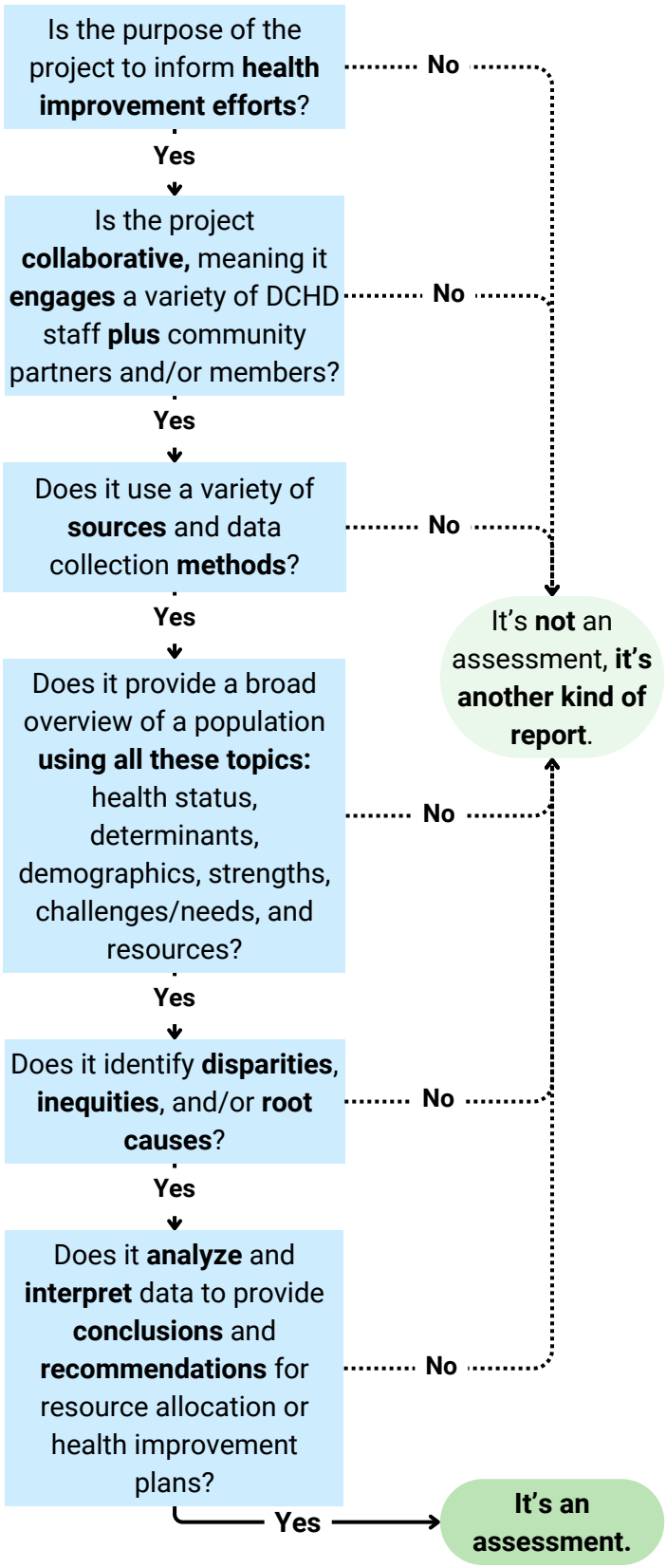
Assessments vs Other Types of Reports

An **assessment** is a collaborative gathering of information about a population that must include:

- Analysis and synthesis of data to **draw conclusions and make recommendations** for health improvement priorities, goals, and/or strategies
- Identification of community demographics, health status, risk/protective factors, social/structural determinants, strengths, challenges/needs, and resources
- Discussion of disparities, inequities, root causes, representation, fairness, and who is missing
- Use of multiple sources of data and diverse collection methods
- Engagement of multi-sector partners and community members

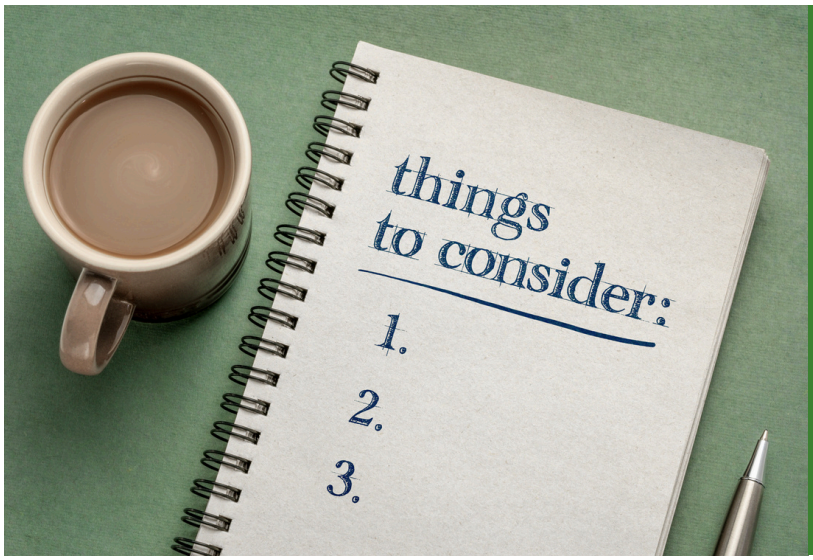
A **report** is a formal document **presenting information** on a topic, project, or issue with one of the following purposes:

- Communicate the findings and recommendations of a community assessment (include "assessment" in title as all assessments require a report)
- Describe or summarize a project, effort, or issue not considered an assessment; providing a factual account rather than assessing; drawing conclusions; and making recommendations.
- Describe a specific population at a point in time, typically by characteristics and/or health status to support planning, decision-making, engagement, and/or programs. This is called a population profile.



Define Purpose

Questions to Consider



Why are you doing this project?

What do you want to achieve?

Are you trying to fill data gaps?

What is your focus?

- Identify the specific community or population to be assessed.
- Determine key issues or challenges needing attention, data gaps needing filled, and questions needing answered.

What is the scope of the project?

- Define the scope of the assessment, indicating the specific areas, topics, or aspects that will be covered.
- Emphasize potential benefits and outcomes of the assessment.
- Establish a project timeline.
- Identify any limitations or constraints that may affect the assessment.

What are your goals?

- Make sure they are realistic and relevant to the community context.

What are your objectives?

- What do you want to learn?
- Clearly state the primary objective(s) in specific statements outlining project aims.
- Ensure objectives are measurable and achievable within the project timeline.
- Align objectives with community needs and partner/community member interests.

Who is the audience?

- Who should contribute to and/or use the assessment or report?
- There are often multiple audiences.

How will you align with overall workgroup goals and objectives?

- Also consider other health department, local, state, and national priorities.

What is your criteria for success?

- Clearly outline the criteria that will be used to measure the success of the assessment. For example: measurable engagement and positive impact by completing the project within the timeline and budget, ensuring community involvement, identifying gaps or barriers, making actionable recommendations and documenting assessment results.

Define Purpose

Writing the Purpose Statement

This is an important step in the assessment and reporting process because it establishes a clear and shared understanding of what you aim to accomplish, why it matters, and how it will be carried out. When writing a purpose statement:

- Use a health equity lens and refer to the Standard Approach.
- Identify and assess the requirements from foundational public health authorities and partners such as the Public Health Accreditation Board (PHAB), Davis4Health coalitions and workgroups, Community Health Improvement Plan (CHIP), Area Agencies on Aging (AAA), or other local agencies/partners.
- Use clear, straightforward, and action oriented language.
- Ensure it conveys a sense of purpose and intent - use verbs that describe the actions you plan to take during the assessment.
- Tailor language and tone to the intended audience (consider background and knowledge level of audience).
- Provide clear definitions if there are terms that have different interpretations.
- Try to frame in a positive and optimistic tone. Use a strengths-based approach and always identify what is going well (e.g., community strengths and assets).
- Review and revise to eliminate unnecessary information and improve clarity.
- Seek feedback from others to ensure that the statement effectively communicates the intention.

Establish & Implement Methods

Choose Framework

For assessments, pick a framework or multiple frameworks to guide your work. A smaller report may not always need a framework but it is worth considering. Frameworks can be modified to meet the needs of the Davis County project. Choosing a framework is often a PHAB requirement.

There are many frameworks that could be used depending on the project. It is recommended to review existing DCHD reports as well as reports and assessments from other organizations or agencies relating to the topic or population your assessment/report is about. Make sure the framework is related to your purpose. Search for frameworks that other health departments, organizations, and nonprofits have used. You can search statewide, nationwide, in academia, and more. **Consult a COP for help finding and applying frameworks.** Some past examples include:

Assessments	Frameworks
CHA and CHIP	County Health Rankings & Roadmaps
Community Equity Assessment	Tool for Health & Resilience In Vulnerable Environments
Housing Environment Assessment	The 5 A's of Housing
Community Resilience Assessment	Collaborative for Academic, Social, and Emotional Learning; EveryDay Strong; Strengthening Families Program; & Healthy Outcomes from Positive Experiences

Consider Data Needs

To consider data needs, identify what information is needed to meet the goals and objectives of the project. **Consult an epidemiologist for any data support you need, such as with collection, tools, analysis, etc.**

Finding and Using Already Existing Data

- Commonly used secondary data sources for demographics, outcomes, behaviors, social and economic factors, and physical environment include:
  - Centers for Disease Control & Prevention
  - County Health Rankings & Roadmaps
  - Healthy People 2030
  - Student Health and Risk Prevention (SHARP) Statewide Survey
  - University of Utah, Kem C. Gardner Policy Institute
  - U.S. Census Bureau
  - Utah Healthy Places Index
  - Utah Public Health Indicator Based Information System (IBIS)
- Check the CHA for sources on your topic.
- Always use the most up-to-date information.
- PubMed and the sources listed above can provide background information on topics too.

Definitions

Quantitative data: numbers and statistics, such as counts, rates, and percentages

Qualitative data: words, community voice, stories, lived experiences, viewpoints, quotes, and historical context

Primary source: data collected by DCHD or Davis4Health, such as surveys, interviews, or case investigations

Secondary source: Existing data collected by an organization outside of DCHD

Establish & Implement Methods

Collecting New Data

Consider your project purpose, goals, and objectives to determine whether you should collect quantitative data, qualitative data, or both. Consult an epidemiologist for the data preparation, collection, and analysis process.

Once you know what kind of data you want, determine the preferred method(s) of collection.

Note: Sometimes your preferred method isn't possible, so do the best with with what resources are available.

Common data collection methods include:

- Online or in-person surveys for community members and/or partners
    - Do a sample size calculation to determine how many responses would be needed to get reliable/representative results.
- Focus group or key informant interviews
- Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis with workgroups or at partner meetings
- Incorporating qualitative data from the community.
    - Refer to this presentation for more information.

Here are some important links to review for your data collection efforts:

- Health Equity Lens Toolkit
- Standard Approach
- PHAB requirements for what types of data need to be included and how the assessment can contribute to the re-accreditation process
- Utah DHHS Data Standardization
- Urban Institute's Do No Harm Guide

Note: Data collection and analysis can sometimes come with costs. Consider this during budgeting.

Data Safety

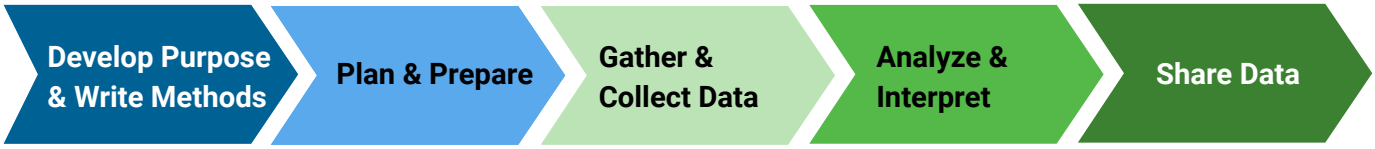
- Consider data safety, privacy, and confidentiality (consent, storage, access/permissions, staff turnover)
- Know your data collection and storage plan. Follow the HIPAA Risk Management Plan as it applies to your work.
    - Is data being stored on DCHD drives?
    - Is it being stored with another community partner?
- Refer to state and federal laws and Davis County policies (HIPAA, retention policies). Policies and practices are currently being updated to align with new state laws.
- Consult with the DCHD Data Modernization Initiative (DMI) team, the Data Policy Coordinator with Information Systems, Epidemiologists, and PM/QI team.

Establish & Implement Methods

Timeline

Develop a draft timeline.

- Use the rule of thirds: ⅓ of time spent planning, ⅓ of time for data collection, and ⅓ of time for analysis, writing, and reporting.
- Report reviewers should ideally be given at least two weeks to review.
- Include a buffer of extra time for additional analysis, editing, and printing delays.
- Consider that end of year is a busy time with impact reports, events, grant progress reports, holidays, etc. If possible, set a target completion date that is not the end of year.
- It is recommended to have regular check-ins with the manager/supervisor leading up to the target completion date, which may need to be as often as once a week and could last 3-4 months if needed.



Budget

Estimate/determine funding needs. Consult managers, involved partners, and Administration as needed. Considerations for the budget:

- Technology and hardware/software budget requests should be projected as far in advance as possible and submitted by June of the year before the expense is anticipated.
- Software: programs for data collection, analysis, reporting, interpretation, etc.
  - Is the desired product, or something similar already being used by the County?
- Hardware: What physical things will you need?
- Other operational expenses are submitted in July/August of the year before purchases.
  - Operating supplies like incentives, food, partner meetings, printing, social media ads/boosts, etc.
- Staff time and timesheet charge codes are tied to the funding source for the project and grant restrictions.

Establish & Implement Methods

Recruiting Partners and Community Members

Assessment work requires partner and community involvement. This is because assessments tell the community story and provide a foundation to improve the health of the population. The involvement of partners and community members ensures the assessment reflects the real experiences, needs, strengths, and priorities of the people it represents. Community voices help identify key issues that may not be visible through quantitative data alone, and partner organizations bring valuable insights, resources, and perspectives. When communities and partners are engaged from the beginning, they are more likely to support, trust, and act on the findings, leading to more effective and sustainable health improvements. The Community Engagement Guide can help with this step.

Other types of reports, depending on the size and purpose, may or may not require direct partner involvement. If you're unsure, consult a COP.

Davis4Health partners are valuable contributors for assessments. They should be considered when deciding what partner support is needed.

When preparing for assessments and reports, consider the following:

- What partners should be part of the assessment work?
- Which coalitions exist that need to be aware of the project or involved in planning?
- What partners have data to share or are working on similar projects?
- What partners can recruit participants and/or share materials?
- What partners can host meetings, focus groups, etc.?
- Which partners can review a draft final report?
- Which partners would like a presentation when the results are ready to be shared?
- How can we involve community members in planning and data collection efforts as needed?
    - Consult the Communications Team, HSB, and Davis4Health partners in the community outreach process for data collection.

Community Health Workers (CHWs) are a key asset to engagement in assessment work. They can help with language and translation needs, attend community events, and help make connections to members of many diverse communities in Davis County.

Unfortunately, funding is not always available for CHWs at DCHD. Seek partner support for CHWs if any are available for consult in the community. COPs can help with this process.

Develop Report

Reporting is important because it is the way to communicate findings, remain transparent, hold ourselves accountable, and inform decision-making. Reports translate data into actionable information. The final deliverable for assessments and other types of reports will look different depending on the project. Review past Reports & Assessments on the DCHD website. Consider what features and components to replicate.

Title Page

Choose a title based on:

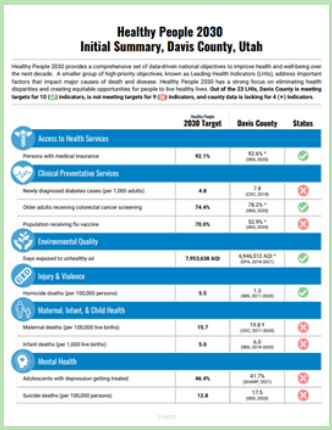
- Type of report or assessment
- Current year of release or the year(s) primary data was collected
- Type of data collected and populations involved
- Workgroups or partner involvement
    - Consider if Davis4Health, Davis County, or Davis County Health Department should be in the title. This may also determine what kind of branding and logos to use.

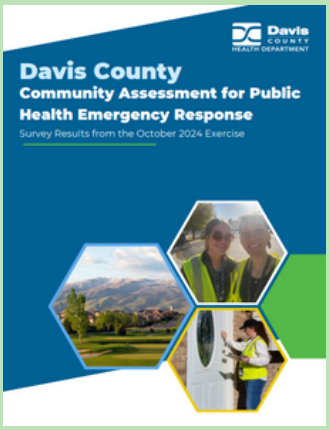
Elements & Headings

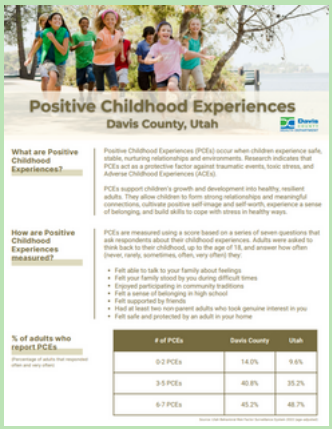
The sections included in a report will be project-dependent. Consider following your chosen framework if applicable. Recommended sections to consider include:

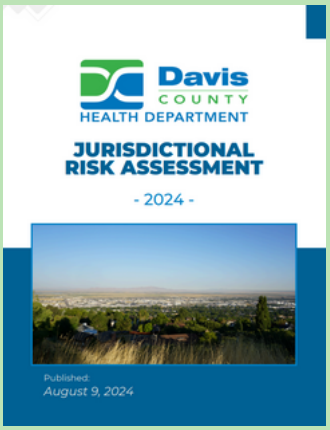
- Title page
- Table of contents
- Acknowledgements
- Key terms
- Executive Summary
- Introduction including purpose, goals, objectives
- Methods and analysis process
- Results and/or findings
- Limitations
- Conclusion, recommendations, data sources
- Policy analysis, community supports (resources), root cause analysis
- Appendix(es)

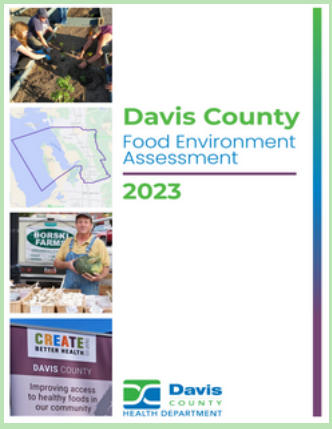
Examples of Reports & Assessments Released by DCHD

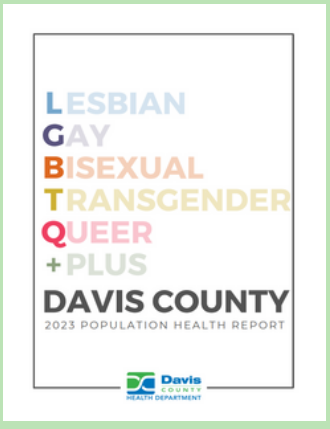












Develop Report

Writing, Aesthetics & Accessibility

Consult an epidemiologist to ensure data interpretations are done correctly. Write in an actionable way even if no recommendations are made by clearly presenting findings with context, using precise language, and structuring the report to draw informed conclusions.

Best Practices

- Review Step 1: Assess the Community Need from the Standard Approach.
- Cite your sources and provide links.
- Use consistent data, editing rules, language, and voice/tone throughout.
- Page number location should start on right hand corner side and establish easy navigation. Page numbering should start after the Table of Contents.
- Use the most recent, most local data available. Present trends, comparisons, demographic, and geographic breakdowns.
- Use appropriate graphics for presenting data including tables, figures, images, infographics, etc.
- Highlight the key data takeaways in a one-page infographic, if helpful, for presenting findings.
- Use person-first, trauma informed, plain language, and follow safe messaging guidelines and CDC inclusive language principles.
- Review accessibility guidelines; consult Travis Olsen, COP.
- Consider if translations are needed for various communities involved in the project.
- Follow the DCHD Branding Guide.

Platform

Consider how you plan to write and collaborate on the report. Will you be using Google Docs, Canva, and/or another platform?

- Building in Google Docs is best to collaborate.
- Canva allows for more creativity, but diligence is needed to ensure reports are accessible and uniform.

Editing & Review

Plan for a good amount of time for editing and review of the final drafts. This will depend on the size of the report; two weeks is a good starting point. Final approvals will be needed before publishing the report.

- Workgroups, volunteers from the CHA committee, epidemiologists, COPs, Communications Team, and DCHD subject matter experts should be included in the review process .
- External reviewers can be suggested by COPs or by the internal DCHD subject matter experts.
- Potential prompts for reviewers:
  - What were the main takeaways from the section?
  - What questions were you left with?
  - How do you feel about the images included? Which would you keep or remove?
  - Look for any spelling, punctuation, grammar, formatting, and accessibility issues.
  - Do you have any additional recommendations or comments you would like to share?
- Get final approval from Bureau Manager and Health Director (topic dependent).

Share & Communicate Findings

Communications

Consider the communications plan during the development stage. It is important to make the community and partners aware of new reports and assessments. Think about the following:

- Communications requirements during the report development process; read the Communications Guide, and consult with the Communications Team
- Reporting back to participants if appropriate for transparency
- Publishing to website (determine name on the website and category, such as by topic or population)
  - Export to PDF (web version usually doesn't have blank pages, print copy may have blank pages)
- Are printed copies needed? Consider this during logistics/budgeting phase of developing methods.
  - If so, how many? Get an estimate (Davis School District, Got Print, others), complete the Purchase Order (place order, pick-up, submit receipt).
  - Printing can also be done in-house; ask Administration for costs and capabilities.
- Communication & promotion plan
  - Internal newsletter, emails, public social media posts, TV monitors, etc.
    - Ask the Communications Manager for due date of newsletter
    - Work with manager and workgroup to help with communications and promotion
    - Work with Communications Manager for social media posts
  - Presenting highlights to coalitions, partners, and staff
    - Create summary video or short videos, webinars, presentations of various lengths and level of details; slides of takeaways for roadshow presentation(s)
    - Consider conferences and partner meetings to present if appropriate
- Develop a process for updating document if error/typo corrections are needed.

Conclusion: Putting it all together

Community assessment and reporting work is a collaborative and evolving process. Whether you're leading a formal Community Health Assessment or preparing a short report, this guide outlines a flexible but structured path. The key is to engage the right people, follow the proven steps, utilize guiding documents, and ensure the work reflects the real experiences, needs, and strengths of the community.

Reference this page to stay on track and ensure your work is meaningful, consistent, and actionable.

Assessment & Reporting Roadmap

Refresh Skills & Resources

Start by reviewing past assessments and reports, DCHD guiding documents, and relevant resources.

Develop Workgroup

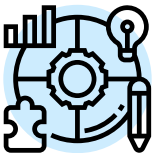
Include relevant staff, partners, and community members for an informed, representative, and collaborative process.

Quick Reference

- healthstrategy@co.davis.ut.us
- Reports & Assessments
- Health Public Google Drive

Define Purpose

Clearly define your purpose, goals, objectives, audience, and scope. Determine if you are doing an assessment or another type of report to meet appropriate requirements and follow the right process.

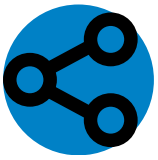


Establish & Implement Methods

Choose data collection and analysis methods based on your goals. Use both existing sources and new data if needed. Incorporate community voice if possible. Consider logistics from the beginning such as timeline, budget, staffing, and other needs.

Develop Report

Present findings clearly using plain language, data visuals, and a consistent tone. Include key sections like purpose, methods, and results. Plan time for editing, review, and accessibility.



Share & Communicate Findings

Share results in a way that are useful and accessible to the intended audience. Always report back to those who contribute to the data. Use presentations, one-page summaries, social media, and meetings. Establish a communication plan early.