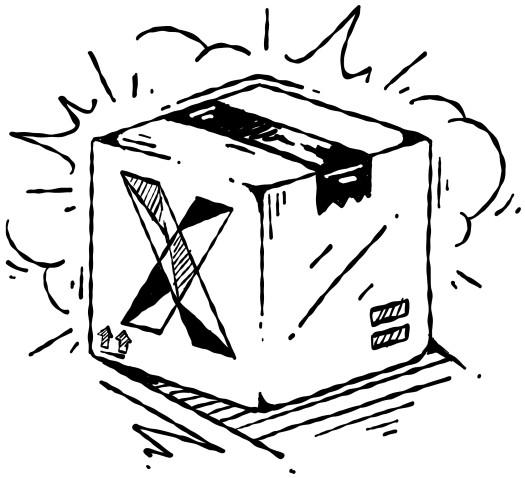


CityServeX

Community Advocate Training

Core Content - Section 3

ASSESSMENTS

Module 3 — Assessment: Knowing Your Community

Why Assessment Comes Before Anything Else

There's a temptation I want to name right away, because almost every Community Advocate falls into it at least once: assuming you already know your community. You live there. You've served there, maybe for years, maybe for decades. Surely you already know what people need.

Resist that assumption. It's one of the most common and costly mistakes in community work, and here's the honest reason why: data without story misleads you, and story without data oversimplifies things. You need both. Before a Resource Coordinator ever opens a shift, before 888-INFO-CARE takes its first call, before a single referral is logged in Findhelp, someone has to sit down and actually find out what is happening in this community — not what everyone assumes is happening.

As Jed Mullenix, President of Within Reach, puts it: "To love our city, we must know our city! Knowing begins with listening." That's not a slogan for this module — it's the whole reason it exists.

This isn't a formality to check off your list. A real assessment builds community connections — every interview is a relationship investment feeding your four-lane network. It guides your strategic planning. It surfaces the community's own vision, not just its problems. And it reveals the historical and economic forces — old redlining maps, factory closures, demographic shifts — that quietly shape every single need a Resource Coordinator will encounter down the road. Skip this step, and you're building on guesses instead of ground.

Six Reasons Your Site Must Conduct an Assessment

- Build Community Connections: an assessment is not just data collection — it's relationship building. Every interview, every walkthrough, every conversation feeds your four-lane network.
- Guide Strategic Planning: without assessment data, your site is guessing. With it, you have a concrete foundation for decisions about staffing, service hours, outreach priorities, and partnership development.
- Discover Vision and Motivation: assessments surface the dreams people have for their own community — not just the problems. That vision becomes the fuel for everything CityServeX does.
- Understand Forces Affecting People: economic pressures, historical patterns, demographic shifts, and cultural dynamics shape every need your Resource Coordinators will encounter. Know them.
- Understand Community Factors: what affects how your organization is perceived? What barriers exist to engagement? The assessment answers questions you didn't know to ask.

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- Discern Organizational Perception: how does the community view your Partner Site? Where is there trust, and where is there skepticism? Start where you are seen — not where you imagine yourself to be.

Policy: all CityServeX Partner Sites are required to complete a Neighborhood 360 Assessment before reaching full operational capacity. This step typically takes two to three months. It is not optional — it is the operational baseline the entire Resource Coordination model is built on.

Your Two Tools: Seed to Oaks and Within Reach

CityServeX's preferred partner for neighborhood-level work is Seed to Oaks.

Seed to Oaks (STO) helps trusted local leaders move from vision to lasting community impact. We equip churches, businesses, nonprofits, community foundations, and local networks with a repeatable way to understand neighborhood reality, steward what is already present, align people, assets, and action, and take wise next steps. Many communities already have people and institutions that care, but that care can be disconnected from resident voice, local assets, trusted relationships, evidence, and sustainable pathways for action. Seed to Oaks helps leaders listen before they lead, see what is already present, and turn scattered concern into shared understanding, aligned action, and lasting impact. Our primary doorway today is the local church, but the work is designed for a broader ecosystem of pastors, employers, nonprofit leaders, civic partners, funders, residents, and local networks.

Ready to explore what this could look like in your community?

Connect with **Kathy Chavez, Director of Programs at Seed to Oaks**. Share a little about yourself, your community, and what you are hoping to understand or accomplish. Kathy will connect with you directly to learn more and help determine the right next step. **Connect with Seed to Oaks**

If your site is leading a bigger, multi-organization or citywide coalition effort, Within Reach offers a deeper regional model — useful when you need to understand patterns across an entire region, not just a single neighborhood. You can review the Omah, Nebraska model at, State of the City by Within Reach withinreach.com

You don't have to pick between them forever, and you don't need to master both right now. Just know this: whichever one fits your site's scope, the output you're building toward is the same thing — a Gap Map.

Building Your Gap Map: Where the Four Lanes Fall Short

A Gap Map is simply an honest picture of where needs exist and where the Four Lanes are and aren't currently meeting them. Every community gap lives in one of the Four Lanes, and each lane tends to have a predictable blind spot:

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- Faith: often strong on relational trust, but weak on formal case management.
- Business: strong on employment and skills, but weak on long-term community investment.
- Government: strong on formal safety nets, but weak on relational, last-mile connection.
- Nonprofit: strong on specialized expertise, but weak on cross-organization coordination.

Here's the part that matters most: the biggest gaps aren't inside any one lane — they're in the space between all four. Examples that routinely fall between lanes: practical neighbor-sized needs (home repair, transportation, yardwork) that nonprofits don't serve and government doesn't fund; navigation support for someone walking through a complex, multi-system need that no single organization owns; after-hours and weekend access; service in zip codes outside major nonprofit footprints; bilingual or bicultural resource navigation; and needs that don't fit any program's eligibility rules. That in-between space is exactly where CityServeX's whole model was built to operate, and it's exactly what your Gap Map should be designed to reveal.

Building it is a straightforward procedure: map existing services in each Lane within your service area, using Findhelp (cityservex.help) as your starting database and local knowledge to supplement it; interview key stakeholders in each Lane and ask what needs they see that they cannot serve and where people fall through; document the recurring needs community members keep expressing; identify geographic gaps — which zip codes or neighborhoods are underserved compared to others; and note duplication, since multiple organizations providing the same service with no coordination is itself a gap, representing wasted capacity. Compile all of it into a Gap Report to share with your four-lane coalition and CityServeX leadership — this becomes the working document for your site's strategic priorities.

Your Assessment Options

Seed to Oaks offers three depths of assessment, so you can start where your capacity allows and grow from there:

- Virtual Neighborhood Walkthrough: a 45-minute virtual meeting that brings your neighborhood to life through an interactive map, using ArcGIS mapping and Esri's Tapestry Segmentation data. Ideal for an initial broad understanding without a large resource commitment. Suggested donation: $150.
- In-Field Neighborhood 360° Assessment: a step-by-step, four-month assessment led by a six-role team (Coordinator, Statistician, Observer, Local Resident, Interviewer, Asset Mapper). The most comprehensive option. Suggested donation: $3,000.
- Neighborhood Explorer: engages your team, listens to your neighbors, and turns scattered files and meetings into a single source of truth. Suggested donation: $3,500 to $8,000.

If budget is a constraint, begin with the Virtual Walkthrough while planning for the full In-Field Assessment. Visit seedtooaks.com/neighborhood-360-info to review options, and discuss with your Care Champion which type best fits your site's current stage.

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Running Your Community Mapping Meeting

Before you ever contact Seed to Oaks or Within Reach, start smaller and closer to home. Facilitate a "community mapping" meeting with two or three people who already know your community well — a longtime resident, a business owner, a nonprofit director. Your goal in that meeting is not to land on final answers. It's to have an honest discussion about how to gather accurate community information — not perceived needs, but real data that will actually drive positive outcomes. Write up your notes and file them with your site's planning documents within 48 hours, while the conversation is still fresh.

From there, contact Seed to Oaks (and Within Reach, if a regional coalition effort is already underway) no later than the start of your second month on the job. A formal assessment typically takes two to three months to complete, so the earlier you start this clock, the sooner you'll have real data in hand.

While you wait on the formal results, don't sit idle. Schedule at least three listening sessions with community leaders. In every single one of these conversations, ask the same three questions: What need do you see most often? Who else is already working on this? What's been tried before, and why did it stop? That third question alone will save you months of repeating other people's failed experiments — don't skip it.

From Findings to Action: Your Top 5 Needs Document

Once your findings are in hand — whether from your own listening sessions or the formal assessment — do not file them away. That's the single most common way an assessment's value gets wasted.

Read the full assessment as a leadership team. We recommend everyone involved in your operation — staff, Resource Coordinators, board members, volunteers, and community partners — read it too; the awareness it creates changes how people see the community they're serving. Share it with your coalition partners, so the data becomes their shared agenda too, not just yours. Then use everything you've gathered to complete your site's Top 5 Needs working document — the specific, data-backed needs (commonly housing stability, food security, healthcare access, employment and income, and practical neighbor-sized needs) that become your operational compass for the next year. For each of those five needs, identify five local providers who already address it. That list becomes your starting point for referrals and, later, for coalition-building.

Your Top 5 Needs are not fixed. Economic conditions change, populations shift, and programs open and close. Revisit your Top 5 every 12 months with your coalition and update your site's working document accordingly.

Your Assessment Timeline

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Here's how this stage should unfold in practice, start to finish:

- Weeks 1–2: hold your community mapping meeting and build a first-draft Gap Map from whatever data you can pull together right now — don't wait for anything formal to start this.
- Month 2: contact Seed to Oaks (and Within Reach if applicable) to formally schedule your site's assessment. Loop in your Care Champion and CSX Liaison so the timeline is visible to everyone.
- During the wait: run at least three listening sessions with community leaders, using the same three-question frame every time, and compare notes side-by-side once you've done all three.
- When results arrive: revise your Gap Map, finalize your Top 5 Needs document, and share both with your leadership team and coalition partners within two weeks — not whenever you get around to it.

One Last Thing

It's tempting to treat this module as a delay — something to get through so you can start doing the "real" work. Resist that too. Every relationship you build during an interview, every assumption you test instead of accept, is already the real work. You cannot coordinate resources for needs you haven't actually verified. Get this stage right, and everything after it gets easier.

Discussion Questions

- What data sources are already available to you (city, county, school district, denomination)?
- Who are three community leaders you could interview in the next two weeks?
- What's one assumption about your community's needs you should test rather than assume?
- Why does the module warn against assuming you already know your community, even after years of living or serving there?
- What's the difference between a "perceived need" and a verified one, and why does that distinction matter here?
- Which of the Four Lanes do you expect will be hardest to get accurate data from, and why?

Check List: Before You Move to the Next Module

☐ Facilitate a community mapping meeting with two or three community-knowledgeable people.

☐ File your community mapping notes within 48 hours.

☐ Build a first-draft Gap Map from whatever data is already available.

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- ☐ Contact Seed to Oaks (and Within Reach if applicable) to schedule your formal assessment by the start of Month 2.
- ☐ Loop your Care Champion and CSX Liaison in on the assessment timeline.
- ☐ Schedule and complete at least three listening sessions with community leaders, using the three-question frame.
- ☐ Compare notes from all three listening sessions side-by-side.
- ☐ Once results arrive, revise your Gap Map and finalize your Top 5 Needs document.
- ☐ Share your Top 5 Needs document with leadership and coalition partners within two weeks of receiving it.
- ☐ Identify five local providers for each of your Top 5 needs.

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