



**OPPORTUNITY**  
International

# HOLISTIC COMMUNITY ASSESSMENT

An immersive  
story-capture approach

# HEARING THE VOICES OF THOSE WE SERVE

Mission-guided organizations desire to engage the lives of the people we serve holistically by meeting spiritual, as well as physical, needs. While various assessment approaches exist, most do not capture needs as expressed by people themselves.

In this context, Opportunity International has developed a Holistic Community Assessment approach based on the concept of shalom, capturing realities across five dimensions of life.

This approach captures the day-to-day realities of people through a simple and affordable, yet rich technique based on listening to and scoring stories—providing a valuable snapshot into lives.

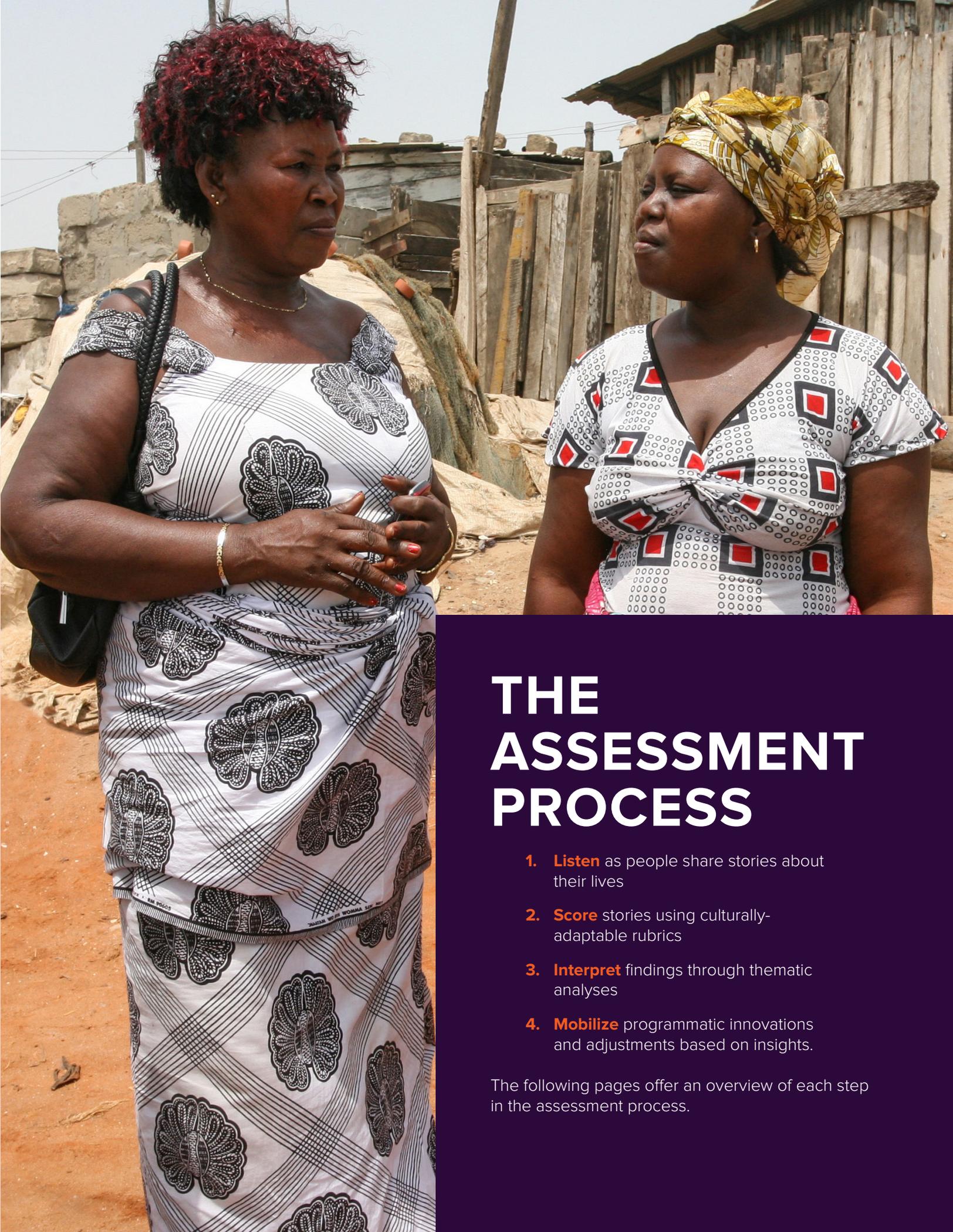
We have seen firsthand how insights produced from this approach for optimizing interventions can have transformative effects. And now, we are excited to share this methodology with you.



## The Holistic Community Assessment Toolkit includes:

1. An introductory video
2. Five illustrative video stories
3. An introductory brochure
4. The toolkit user's guide which includes:
  - ▶ The Holistic Community Assessment research tool
  - ▶ Guidance for implementing the assessment process
  - ▶ Discussion questions for the story videos

The full Holistic Community Assessment Toolkit is downloadable at:  
[www.opportunity.org/holisticassessment](http://www.opportunity.org/holisticassessment)



# THE ASSESSMENT PROCESS

1. **Listen** as people share stories about their lives
2. **Score** stories using culturally-adaptable rubrics
3. **Interpret** findings through thematic analyses
4. **Mobilize** programmatic innovations and adjustments based on insights.

The following pages offer an overview of each step in the assessment process.

# LISTEN

## Listen as People Share Their Stories

The Holistic Community Assessment uses questions based on the concept of shalom, defined as “enjoyment in one’s relationships” by Christian philosopher Nicholas Wolterstorff. These include an individual’s relationship with community, environment, family, self, and God.

We have crafted questions that prompt people to reflect on the past year and tell us a story of the most important instance they can recall related to each of these domains. The goal here is to collect honest, reflective stories of positive or negative experiences.

## Why Story-capture?

Numerous research tools exist to measure tangible aspects of well-being (e.g. physical, financial, health), but few approaches exist to broadly assess intangible aspects of well-being (e.g. hope, peace, security) as expressed by people themselves. The Holistic Community Assessment approach

creates space for people to share about what matters most to them, and there is true power in the practice of sitting and listening to one another’s stories. Christians, perhaps, understand this best through the sharing of personal testimonies to celebrate God’s steadfast goodness.

While there are certainly instances where quantitative approaches are both useful and necessary, when narrow questions are shaped by the researcher, we lose the people’s voice and can miss valuable insights. Quantitative approaches also typically require more questions and larger sample sizes than qualitative approaches, resulting in costly studies.

Thus, in cases where an organization desires more open-ended findings, qualitative approaches such as the Holistic Community Assessment provide rich insights with a fraction of the sample size and cost.

“ [Biblical] shalom is the human being dwelling at peace in all his or her relationships: with God, with self, with fellows, with nature. . . . Shalom at its highest is enjoyment in one’s relationships. Shalom is both God’s cause in the world and our human calling.”

Nicholas Wolterstorff,  
*Until Justice and Peace Embrace*





# SCORE

## Scoring the Stories

After researchers listen to the stories of individuals in a community, they reflect on each story and assign it a score between -5 and +5 in each of the following three categories:

- 1. Context** What situation or circumstances are described?
- 2. Internal** What are the feelings and value responses of the respondent?
- 3. Action** What action(s) did the respondent take?

While the Holistic Community Assessment provides general rubrics for each of the stories, ample room remains for cultural contextualization by the research team. See below for a sample story and scores.

## Relationship with Community Story

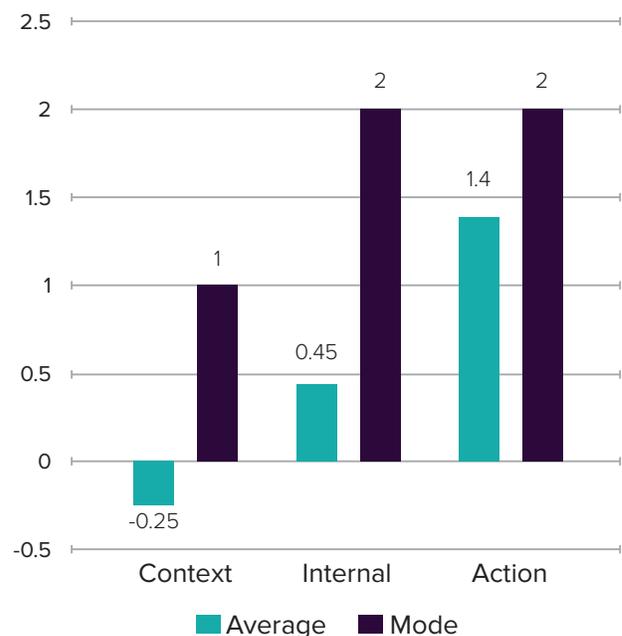
“For me, the most important has been working with a youth group, which I do as part of the women’s network.... I love working with youth because I want these girls to have opportunities I couldn’t have.

I want to advise them to finish their studies and progress and be self sufficient so that they can decide what they want to do and not.... In reality, when I’m with these kids I think about myself.

I would have desired this support that they have now during my youth, and seeing what passed with the conflict that we lived through here, it wasn’t the life we had dreamed of, but we need to leave that behind us and move forward. That’s why I love working with these girls and progressing.”

Yaniris, Colombia

Self Story Scores, Philippines (2018)



# INTERPRET

## Analyzing the Stories

Careful story analysis forms a deep understanding of individuals, families, and their broader communities. The exercises described here provide a sense of what individuals value, their aspirations, their fears, their day-to-day lives, and more.

## Thematic Analysis

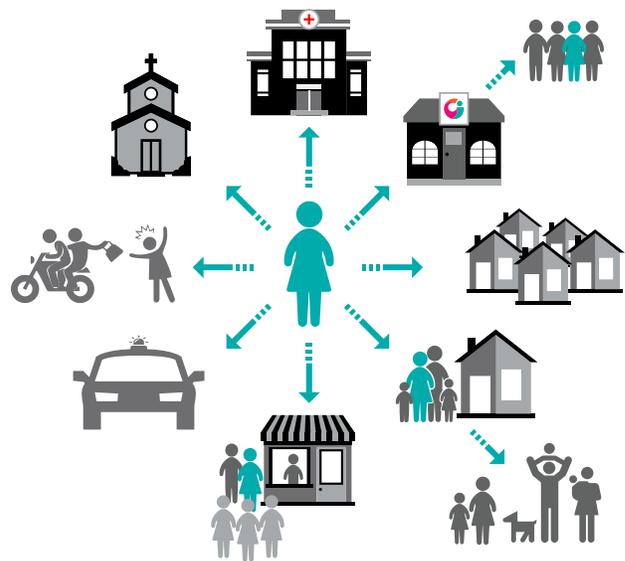
After scoring, we find that stories with similar scores often references similar topics or themes.

### Thematic Breakdown for Family Story by Context Score, Malawi

|    |  |
|----|--|
| 5  | Generous husband, unity  |
| 4  | Stopped drinking, united financial responsibility, spouse stopped cheating, forgiveness, unity |
| 3  | Business/financial success   |
| 2  | Unity, better finances, peace, new house, basic needs met                                      |
| 1  | Good communication, unity, financial stability, mutual support, love, iron roof                |
| 0  | No family change   |
| -1 | Polygamy, rudeness, single parent, financial disputes  |
| -2 | Business failure, quarrels, sickness   |
| -3 | Divorce, physical distance, drunkenness, infidelity  |
| -4 | Quarreling, separation, abandonment  |
| -5 | Rebellious children, death of spouse, drunkenness  |

## Identifying Main Characters

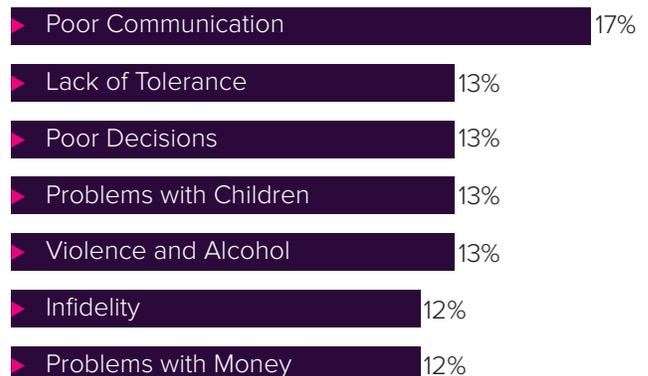
Reading through the stories, we can identify the individuals and institutions that are important to the respondents and play a role in their everyday lives.



## Understanding Connections

While telling their stories, respondents often share the positive or negative factors that contribute to their relationships in each domain.

### Negative Factors for Family Story, Colombia



# MOBILIZE

## Using the Insights

While taking the time to sit and talk to the people we seek to serve is valuable in its own right, insights from the Holistic Community Assessment can help an organization adjust existing or design new, client-centric interventions.

*Below are some examples of how organizations around the world have used this approach to improve their work.*

## Catalyzing Behavior Change

Building on the Holistic Community Assessment approach, Opportunity Knowledge Management is designing a follow-on approach that offers a way for organizations to understand factors that drive behavior change: awareness, pathways, and motivations (e.g. values, hopes, aspirations, fears).

Unlocking motivation, in particular, will allow for the careful design and implementation of holistic training systems grounded in research insights.



*“By listening to these stories and to how they feel and what they think, it will help us identify areas of intervention [and] places where we can extend help so that they can be supported through [their] journey.”*

Amina Mendez Acosta  
Corporate Planning Manager  
ASKI, Philippines

*“The story capture research process has been very useful. ...During the research process, we heard many stories about relational difficulties. As a result, we made a strategic decision to develop a training program targeting couples. It has been a big success. It is one of our client leaders' favorite programs.”*

Mitzi Machado Aríza  
Director of Operations  
AGAPE, Colombia



# IS YOUR ORGANIZATION INTERESTED IN CONDUCTING YOUR OWN HOLISTIC COMMUNITY ASSESSMENT?

Opportunity's Knowledge Management team is here to help, offering tailored solutions to your organization's research requirements.



## 1. Download and Check In

Download your free copy of the Holistic Community Assessment Toolkit at [opportunity.org/HolisticAssessment](http://opportunity.org/HolisticAssessment). Next, consult with our team to ensure your independently-managed assessment is on track for success. [holisticassessment@opportunity.org](mailto:holisticassessment@opportunity.org)



## 2. Hands-on Training

Gain an in-depth understanding of the assessment approach with a training workshop.



## 3. Research Implementation

Entrust your assessment to Opportunity's Knowledge Management team, who can manage and run the research independently or in collaboration with your team.

Special thanks to Atul and Birage Tandon, the Bolthouse Foundation, the Vista Hermosa Foundation, the Imago Dei Fund, and the MacLellan Foundation, without whose support the development of this holistic community assessment approach would not have been possible.



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### Mission

By providing financial solutions and training, we empower people living in poverty to transform their lives, their children's futures, and their communities.

### Vision

A world in which all people have the opportunity to achieve a life free from poverty, with dignity, and purpose.

### Motivation

We respond to Jesus Christ's call to love and serve the poor. We seek to emulate the Good Samaritan, whose compassion crossed ethnic groups and religions.