

# **Part I: Introduction: Overview of Research Methodology**

## Purpose of the Project

Good decisions are based on accurate and timely information. The Coastal Bend Community Needs Assessment Sponsors, together with other community agencies, organizations and leaders have an ongoing commitment to improve the lives of people in the Coastal Bend region based on an accurate understanding of the needs of the citizenry.

All communities have resources that can be used to impact community conditions. An accounting of community resources provides a key starting point to any investigation of which resources might be more effectively used.

An accurate assessment of the cares and concerns of the community requires a sensitive ear to the ‘voices of the community’. A vocal minority often overly-represents these voices therefore, care must be taken to solicit the diverse voices represented in the community.

The purpose of this research project and its research findings is to identify the important needs of the community. Community is defined here as the 12 counties of Nueces, San Patricio, Jim Wells, Bee, Kleberg, Live Oak, Aransas, Brooks, Duval, Kenedy, McMullen, and Refugio. This community area consists of 12,943 square miles and has a population density of 42.42 residents per square mile.

<http://socrates.cdr.state.tx.us/CNP/ASP/cnp.asp>

## Methodology

### Overview:

This year-long research project utilized both Formative and Summative approaches as well as a mixed design of both Qualitative and Quantitative research.

In **formative evaluation**, data can be collected and then that same data is used to design and modify subsequent components in the ongoing evaluation process. In this project, an example of the formative process is that the data collected in Community Listening Sessions in Phase I (described later) was used in later Focus Groups with samples of Key Informants in the 12 county area. Formative evaluators usually have a close relationship with the group they are assisting (Coastal Bend Community Steering Committee) and view the research project as both a developmental process and an evaluation.

**Summative evaluation** determines the effectiveness of an intervention. In this case, data was collected to assess the current status of Target Need Areas. The Coastal Bend Community Steering Committee in consultation with the external researchers articulated these Targeted Need Areas. Summative evaluation was used to assess the progress that has occurred in changing the conditions of the Target Need Areas.

The research team also employed a **Mixed Design Approach** using both **Qualitative and Quantitative Research**. Traditionally, in Quantitative Research, subjects are assessed utilizing some type of assessment instrument. Data is analyzed and conclusions are drawn. In Qualitative Research, individual case studies are examined in-depth. An example of this Mixed Design approach in this report was that in the Phase III, Community Response Focus Groups that were held in order to examine in-depth, the data that was collected in Phase I utilizing Telephone Surveys of a sample of community members. The facilitator of the Community

Response sessions presented the findings of the Telephone Surveys and asked the focus group to respond to these findings more in-depth.

In summary, by combining both formative and summative discovery and by utilizing both quantitative and qualitative data collection, the findings of study should provide the Coastal Bend Community Steering Committee and its partners, a rich variety of comprehensive information from all sectors of the community.

### **Specific Methods:**

Chart 1 below details and reviews a multiphase strategy for obtaining community input that was utilized to maximize the potential for accurate representation of the Perspectives and factual data from a variety of personal and archival data sources.

This project involved four phases of research and evaluation plus a pre-project phase of final goal formulation. A schematic of all four phases is given in Chart 1.

### **Phase 0. Pre-project and Final Goal Formulation:**

The Coastal Bend Comprehensive Needs Assessment Steering Committee (hereafter called CB Steering Committee) was formed by the staff of the Coastal Bend United Way. Membership included a diverse group of community leaders invested in this research process. The initial task of the CB Steering Committee was to work with the Project Directors in clearly defining the Targeted Need Areas (TNA) that were examined for the duration of the project. The Target Need Areas chosen by the committee were: Children and Youth; Families; Seniors; Education/Preparation/Job Skills; Self-sufficiency/Basic Needs; Neighborhoods/Communities; Health/Well-being; and Disabilities.

### ***PHASE I. INFORMATION GATHERING:***

Phase I lasted approximately 120 days and consisted of four initiatives that occurred simultaneously. These included (1) Community Listening Sessions; (2) Collection and Update of Archival Data; (3) Survey of Key Informants in 12 county area; and (4) Telephone surveys of community members.

#### **1. Community Listening sessions**

After the Target Need Areas were defined, a series of community listening sessions were provided as opportunities for diverse community members to voice their concerns related to each of the areas. Listening sessions allowed community members an opportunity to discuss in an open forum, cares and concerns. These sessions were announced in a variety of community publications as well as personal invitations and were held in community-based settings that encouraged a representation of the targeted geographical region.

There were a total of 18 listening sessions (2 sessions in each of nine county configurations). In considering regional and geographical concerns, the nine county configurations utilized for the project were Aransas, Refugio, San Patricio, Nueces, Kleberg/Kenedy (combined), Jim Wells/Duval (combined), McMullen/Live Oak (combined), Bee, and Brooks. Each of the 18 listening sessions was one and one-half hours in length and was held in each of the nine county configurations in order to provide available access by a wider constituency of citizens. A certified professional facilitator conducted the research in this initiative.

## **2. Collection and Update of Archival Data**

There have previously been multiple data collection activities in the Coastal Bend community. While much of the data collected in this study is considered “subjective” data (Perspectives), secondary data strengthens the study with “objective” (quantifiable and factual) data. Over 100 sources of archival data were synthesized in this phase of the project. Each of the primary sources of data is available as an internet link at <http://www.unitedwaycorpus.org/> and pertinent data is also utilized in this report. The researchers of this project are extremely appreciative of the investigators in previous extensive research on living conditions in the Coastal Bend area. Finally, the Census of 2000 provided a rich source of information.

## **3. Survey of Key Informants**

Key Informants were considered to be community leaders who can draw on their experiences in the community and who play pivotal roles in creating future agendas. Key Informants consist of business/labor/professional leaders, government officials, executives and board members of service organizations, foundation and philanthropic leaders, religious leaders, media representatives, and leaders of civic organizations and advocacy groups.

Key Informants have often had experience with objective data and can provide subjective information about their Perspectives and experiences working with community issues and problems.

The research team surveyed Key Informants and received data from 251 Key Informants. Informants detailed their experiences and described the counties, populations and issues they felt knowledgeable about. Percentages reported as part of the key informant analysis reflect the fact that some key Informants endorsed knowledge of several counties and issues. The analysis was thus conducted on the total number of key informant Perspectives (which often totaled greater than 251).

## **4. Telephone Surveys of Randomly Selected Community Members**

One thousand telephone interviews were completed with a stratified sample of participants in the 12 counties. The number of calls completed in each county was proportional to best current population estimates of the county. Based on the estimation of 500,000 representing 189,277 households in this region, such a sample ensured adequate representation. Statistical confidence intervals were computed around the resulting response rates to ensure that the sample represents an acceptable margin of error.\* Telephone contacts required 15-30 minutes each. Trained personnel used a standardized procedure for conducting each interview; both English and Spanish speaking interviewers were available to conduct the interviews. Interviewers used a telephone survey that was created by the external researchers with input and review from the CB Steering Committee.

\*Statistical footnote about Standard error of measurement. See reference for Sample Size estimates  
Krejcie, R.V., & Morgan, D.W. (1970) Determining sample size for research activities. *Educational and Psychological Measurement*, 30, 607-610  
“2000 Census data estimates

### **PHASE II. DATA MANAGEMENT:**

Statistical analysis of both perceptual and ‘factual’ data was enabled with the computer software Statistical Package for Social Sciences (SPSS). The software allowed for data to be stored and retrieved from various databases for use in both descriptive and inferential data analyses. Outputs from these statistical analyses will

serve as part of the community electronic database using ACCESS. ACCESS formatted data were uploaded to a web site accessible to concerned community members and key Informants as part of their continuing efforts to impact community conditions.

***PHASE III. COMMUNITY RESPONSE FOCUS GROUPS:***

Two community response focus groups were conducted in community settings in each of the nine county configurations (18 total). These groups were designed as follow-ups to the community listening sessions in Phase I. Extended dialogue and more focused probes were utilized to gauge community responses to a presentation of initial findings from Phase I data collection efforts. These responses provided additional formative information to the researchers and CB steering committee.

***PHASE IV. FINAL REPORTING AND DATABASE ESTABLISHMENT:***

A final report was presented orally to the CB steering committee and was anticipated to be begin a series of action planning sessions. A more detailed written version of the report with complete descriptions of sampling schemes, data analytic strategies, and detailed findings from all phases and data collection strategies was presented to the committee.

An Internet accessible database was established which will enable community members and key Informants opportunities to utilize data collected during this project for their own planning efforts. The web site contains links to other primary data sources and resource libraries.

**Chart 1. Review of Research Methodology**

	<b>Activity</b>	<b>Purpose</b>	<b>Details</b>	<b>Deliverable</b>
<b>Phase 0</b>	Meet with CB Steering Committee	To define Targeted Need Areas	First meeting during planning stage (meet throughout the project)	List of Targeted Need Areas that align with CB Mission
<b>Phase I</b>				
90-120 Days	Community Listening Sessions	To hear cares and concerns of community members	2 Sessions of 1.5 hours in each county configuration (18 T)	Community Perspectives Of Targeted Need Areas
90-120 Days	Collection & Update of Archival Data	To update information obtained from secondary data sources	Concurrently with other activities conducted in Phase I	Database of Information on Targeted Need Areas
90-120 Days	Survey of Key Informants in 12 county area	To assess Perspectives of community leaders on Targeted Need Areas	Concurrently with other activities conducted in Phase I	Perspectives of Community and Agency Leaders about Targeted Need Areas
90-120 Days	Telephone Surveys of Randomly selected Community Members	To assess Perspectives of community members on Targeted Need Areas	Concurrently with other activities conducted in Phase I	Perspectives of Community and Agency members about Targeted Need Areas
<b>Phase II</b>				
30-60 Days	Data Management	To compile initial Phase I data from 4 distinct data collection processes	Data Analysis utilizing SPSS software & ACCESS	Established Data Base
30-60 Days	Focus group with sample of Key Informants	To collect add'l qualitative data based on initial survey responses	9 sessions; 1.5 Hours each	Extended dialogue; & data collection of key informant reactions to initial findings in Phase I.
30-60 Days	Report and Dialogue with CB Steering Committee	To present data from Phase I and dialogue about Phase III Focus Groups	Immediately upon completion of Data Analysis	Update on Perspectives and Facts about Targeted Need Areas Collected in Phase I and analyzed in Phase II

	<b>Activity</b>	<b>Purpose</b>	<b>Details</b>	<b>Deliverable</b>
<b>Phase III</b>				
30-60 Days	Community Response Focus Groups	To follow-up on cares and concerns voiced in initial community Listening sessions (Phase I)	2 Sessions of 1.5 hours in each county configuration (18 T)	Extended dialogue; & data collection of community reactions to initial findings in Phase I.
<b>Phase IV</b>				
30 Days	Final Reporting	To present findings and suggestions for Action Planning to CB Steering Committee	Immediately following completion of Phase III	Presentation of Final Report including provision of electronic database for community use in action planning
30 Days	Construct Internet Accessible Data Base	To provide a public 'pooling of resources' of findings of this project & allow community access to information sources	Immediately following completion of Phase III	Community Resource

As illustrated in CHART 1, the conclusions of this report reflect the consideration of the convergence of multiple perspective and data sources (see Methodology section).

In addition to the continuous iterative review process during selection of target need areas and content of data instrumentation from a 19-member steering committee, this project collectively included a total of:

1000 randomly selected citizens who were asked to participate in a telephone survey

Over 130 Citizens who participated in 36 scheduled focused listening groups distributed throughout the counties of the study's catchments area.

Two hundred fifty-one (251) community leaders, elected officials and agency workers (Key Informants) who completed a questionnaire detailing their perspective on community issues

An additional 55 Key Informants who participated in listening and reaction sessions to provide feedback and reaction to preliminary results.

A review and synthesis of over 100 archival sources was used to place personal perspective in a wider context.

**A Note On Patterns Of Convergence:**

It can be tempting to over-interpret the significance of convergence of perspectives as indicative of the true reality of the situation. Convergence of perspectives is not necessarily a properly applied test for reliability/validity of these results.

Key Informants, for example, presented a more dire outlook than community members on a number of issues. As it turns out, however, this perspective was far closer to the information illustrated in the archival sources that were reviewed. Key Informants are considered “key” because they have experience with many community issues that may not be part of the daily reality of individual community members.

With respect to the relationship between Citizen Perspectives and Key Informants Perspectives, a lack of convergence is likely to be the rule and convergence the exception. An analysis of these differing perspectives is important as information about the awareness of citizenry versus the daily realities of Key Informants (and visa versa).

The convergence between archival data in the Twelve County Region (12CR) and state or national level data can provide a meaningful interpretive context. Unlike the personal perspective data, these data sources represent a more objective context within which conclusions and future action planning can be situated. Accordingly, findings presented in the following ‘Convergent Overview Charts’ have intentionally concentrated on the relationship between 12CR archival data sources and state/national archival statistics. The perceptual data is still presented along side as it provides another context within which 12CR/State discrepancies can be interpreted.

## TWELVE COUNTY ASSESSMENT AREA:

The twelve county assessment area is defined as the counties of:

- |            |              |                  |
|------------|--------------|------------------|
| 1. Aransas | 5. Jim Wells | 9. McMullen      |
| 2. Bee     | 6. Kenedy    | 10. Nueces       |
| 3. Brooks  | 7. Kleberg   | 11. Refugio      |
| 4. Duval   | 8. Live Oak  | 12. San Patricio |

- This region consists of 12,943 square miles with a population density of 42.42 residents per square mile compared to a statewide density of 79.54.
- According to the 2000 Census, Texas grew from 16,986,510 in 1990 to 20,851,820 in 2000 reflecting an increase of 22.8 percent.
- The twelve county assessment area had an increase from 500,805 people in 1990 to 549,012 in 2000, reflecting a 9.6 percent increase during the decade.
- Total personal income, farm and non-farm, according to the Bureau of Economic Analysis (BEA), was a total of \$12,017,123,000 in 2000 that represented a 7.8 percent increase when compared to 1998 figures. This is compared to a statewide increase of 13.6 percent during the same period.
- The Department of Human Services (DHS) and the U.S. Department of Census estimated a 1997 poverty population of the 12 CR for people of all ages at 124,743. That figure represents 23.0 percent of the non-institutional population compared to a Texas percentage of 16.7 percent for people of all ages.

## **TARGET NEED AREAS**

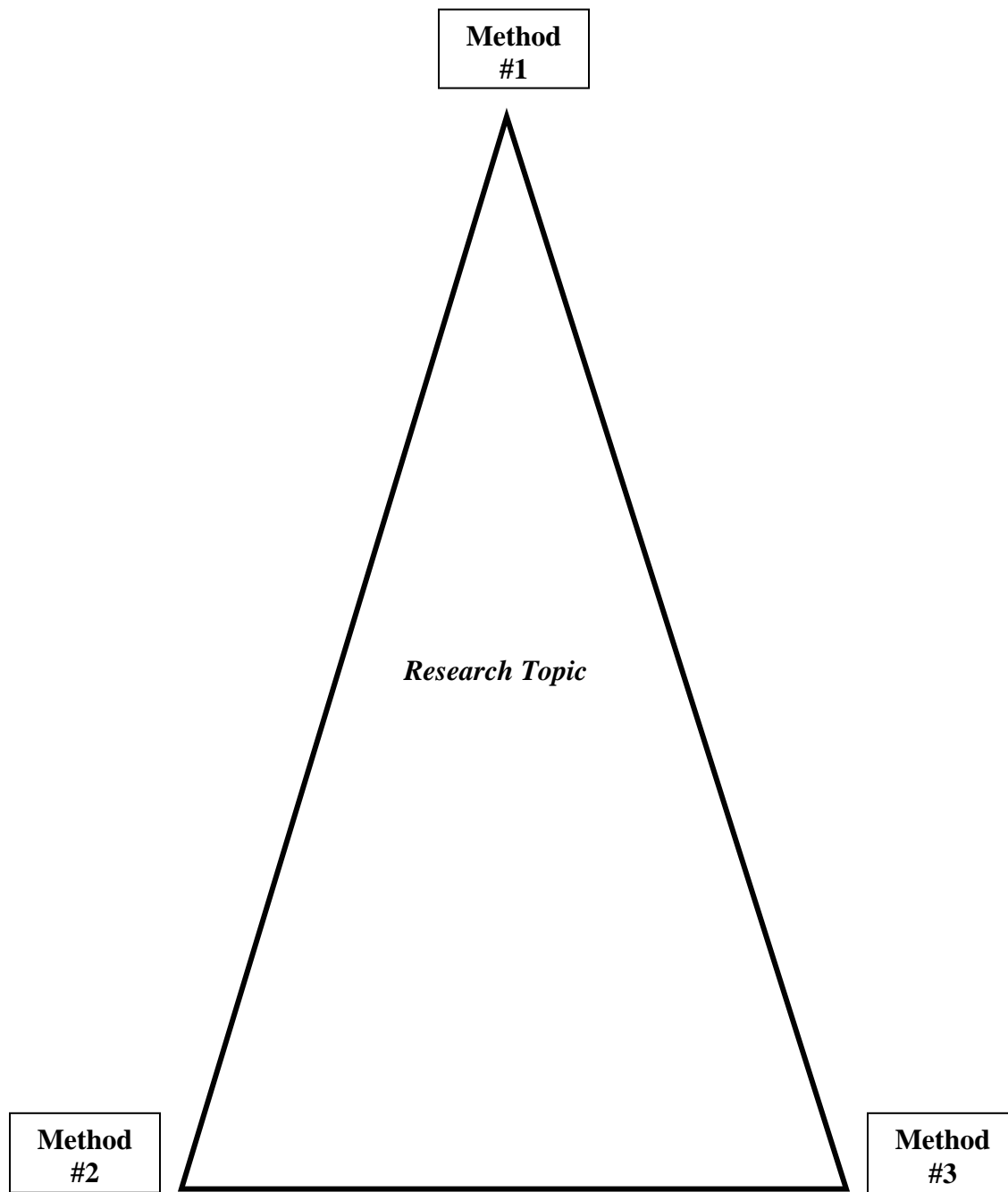
During the summer of 2003, the CB Steering Committee met to discuss the scope of the current study. Areas of inquiry, hereafter called the Target Need Areas, were articulated as:

- **Children and Youth**
- **Families**
- **Seniors**
- **Education/Preparation/Job skills**
- **Self-sufficiency/Basic Needs**
- **Neighborhoods/Communities**
- **Health/Well-being**
- **Disabilities**

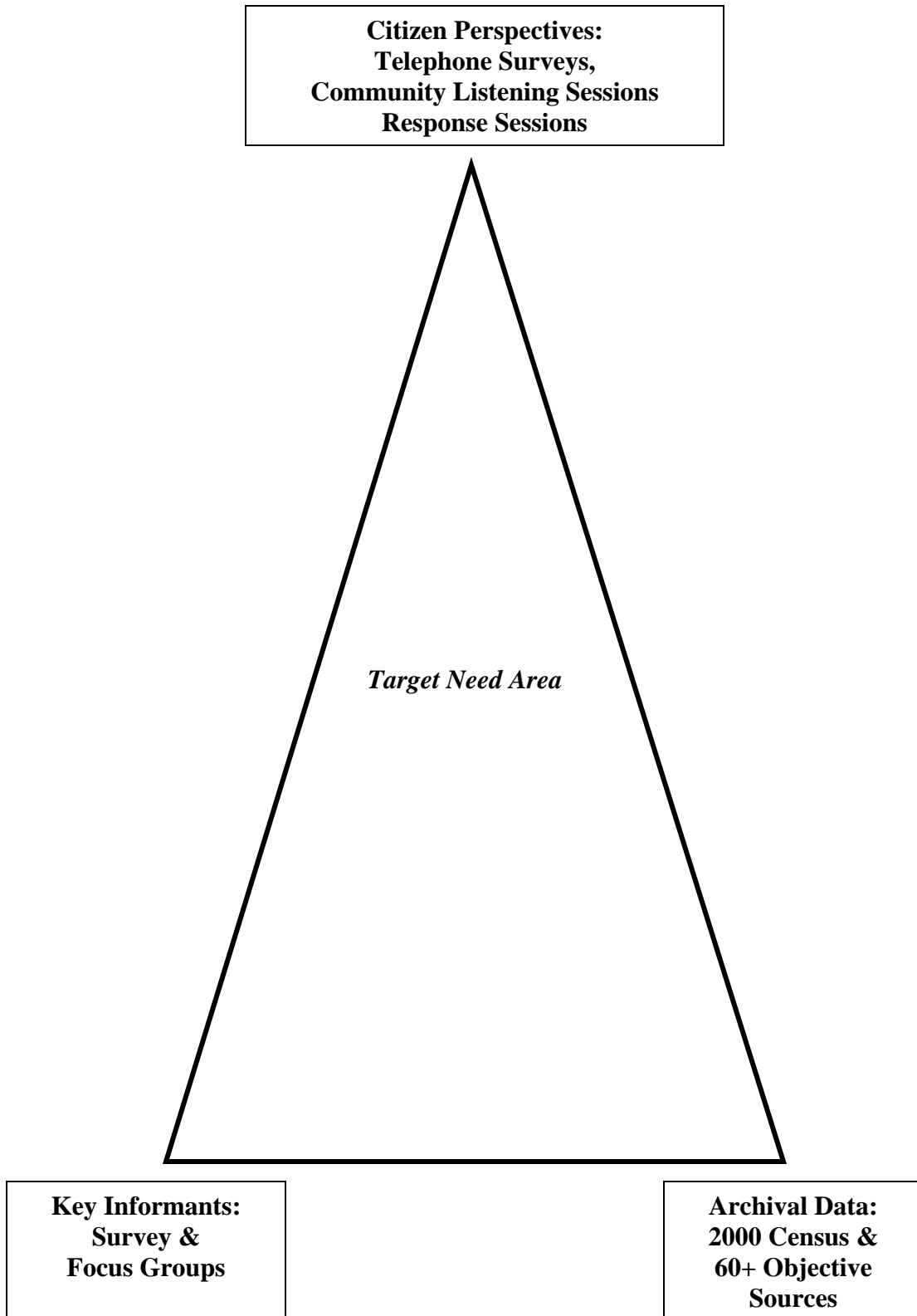
It was widely agreed by both CB Steering Committee members and the researchers that none of the Target Need Areas can be examined in isolation. There is considerable overlap in the topics and none of them can truly be examined outside of the context of this entire study. For example, poverty is a dynamic that runs across all eight Target Need Areas. Similarly, 'Housing' is a dynamic that affects the different categories of citizenry, as well as the areas of Self-sufficiency/Basic Needs, Neighborhoods/Communities, and others.

### Concept of “Triangulation” (Convergence)

The research design utilized for this report draws heavily from the research concept of “Triangulation and Multimethods.” These procedures refer to the strategy of using several different kinds of data-collection methods (such as focus groups, listening sessions, surveys and archival data analysis) to explore a single problem or issue. In short, “Several methods to examine the same topic.”



**Triangulation (Convergence) in 12 CR Needs Assessment Project**



## Methodology Considerations

When engaging in an investigation, researchers know that there will never be 100 percent accuracy. Therefore, astute investigators create methodology designed to capture results with the greatest degree of accuracy that is possible in the given situation.

This study utilized the principle of *convergence*. Convergence means that evidence from different sources is gathered in order to examine one particular construct (or in this case, eight separate Target Need Areas). Different methods in this study were:

- Key Informant surveys
- Key Informant focus groups
- Random citizen telephone surveys
- Open community listening sessions
- Response focus groups
- Archival data

The intent of this study was to re-examine what archival data suggests about the Target Need Areas and then to advance our understanding of this data by asking additional questions of Key Informants and Community Citizens using different forms of assessment.

We had some surprises along the way. An example was when, recapping the demographic information of our 1000+ telephone survey respondents, we found 22% of respondents identifying themselves as Hispanic. In the telephone survey we randomly called a sample of the citizens in the twelve different counties. In a random sample, no individual or group of individuals have a greater chance of being included in the sample than any other and ideally the sample will be a true cross representation with regards to age, race, ethnicity, social and religious backgrounds, family structure, disability status, etc. Statistically we would have expected more people to identify themselves as Hispanic since 56% of the populations in the 12 CR are in this ethnic group. We note that demographers struggle with racial and ethnic classifications especially for Hispanics who often identify themselves in different racial categories. Most likely this occurred in our sample as well.

We also found wide variation between the different counties that were investigated. In the 12 CR, counties ranged in size from 138 households to 110,365 households. This wide variation lends itself to different degrees of specificity of statistical conclusions. In the case of smaller counties we pooled counties with close geographical similarities and resource profiles for the different components of the study. These combinations were confirmed by focus group interviews in which community issues for grouped communities were indeed similar

Because of the convergence principle, any one discrepancy becomes less significant relative to the overall methodology. As weighted in this study, the archival data serves as the main framework with the current undertakings adding to a deeper understanding of the issues. Both the findings with the Key Informants and Community Citizens speak loudly about the needs of the community that were already suggested in the archival data. These findings enabled us to further statistically validate the previous conclusions and to also present some new findings.