

# GTP ORGANIZER TRAINING

## Training Guide #42 Bi-Annual Strategic Evaluation (BASE)

This guide to strategic inventorying and evaluation is designed for faith-based, congregational community organizing projects. Its purpose is to regularize a twice-yearly strategic assessment that systematically reviews project assets and liabilities to allocate project development resources, especially organizing and support staff.

The process assumes that the strength of faith-based community organizing projects is directly related to four indicators: the depth of relationships between organizers and clergy, the size and experience of core planning groups within each congregational unit, the size and experience of the parish or congregational organizing committee, and the experience of the parish or congregation in actions and campaigns.

BASE is *not* a full-fledged strategic planning process. It does not develop a vision or mission for the organization, it does not develop detailed goals and objectives, and it does not assess the organization's external environment.

### 1. Indicators of Unit Development (IUD)

- Depth of clergy-organizer relationships
- 1:1-based culture in organizational units
  - > Relationship-building
  - > Surfacing values and concerns
  - > Building faith in action
- Planning core (8-12)
- Organizing committee (15-45)
- Experienced action constituency (150-500)
  - > single-unit action
  - > participation in federated action
  - > single-unit campaign
  - > participation in federated campaign

### 2. Preliminary Inventory

- List units and review indicators of unit development
- Rate clergy-organizer relationship (+, √, or -)
  - > + = real depth, i.e., organizer understands various levels of clergy's ministry, leadership style, and self-interest
  - > √ = cordial and friendly, promising but still no depth
  - > - = virtually no relationship or a negative relationship without depth
- Rate 1:1-based organizational culture

- > + = organizer has done significant number of 1:1s, producing culture of relationship-building and surfacing values and day-to-day pressures
- > √ = some organizer 1:1s done but culture-building is weak
- > - = insignificant number of 1:1s and culture-building
- Rate planning core
  - > + = 8-12 people working openly in leadership roles
  - > √ = weak in number (at least 3-5) and in leadership roles
  - > - = non-existent or fewer than 3 working as a group
- Rate organizing committee
  - > + = 15-45 people with relationship links to planning core and 1:1 culture
  - > √ = weaker numbers (at least 10) or weak links to planning core or cultural base
  - > - = non-existent or less than 10
- Rate action constituency
  - > + = Consistent 75-150 (small to medium-sized unit) turnout on relationships rather than clergy charisma or life-and-death issue
  - > √ = 35-50 inconsistently mobilized by charismatic clergy or critical issue
  - > - = Little or no action life except when someone yells “fire” during Sunday services
- Classify units by group

### 3. Unit-by-Unit Inventory

- Unit highlights
  - > size/breakdown
  - > staff
  - > history
  - > project involvement
- Character of planning core
  - > assets
  - > liabilities
  - > critical development need(s)
- Clergy
  - > age and experience
  - > leadership style
    - / public persona
    - / private persona
  - > Relationship with organizer
    - / characteristic pattern(s)
    - / frequency of 1:1s
    - / task- or relationship-oriented
    - / organizer's sense of clergy's view of relationship
    - / organizer's view of relationship
  - > Clergy, political, and other connections
  - > Institutional self-interest
  - > Personal self-interest
- Organizer's top two objectives/tasks for unit development

4. Criteria & Priorities for Unit Development (6-12 months)
  - Status of unit development (based on IUDs and unit inventory)
  - Unit size
  - Potential financial contribution
    - > direct
    - > indirect
  - Clergy assets/liabilities
  - Racial-ethnic character
  - Geography
  - Denomination
  - Internal politics
  - Loss-risk (if no action)
  
5. Current Allocation of Resources by Unit and Project Cost Centers
  - 1:1s (new)
  - 1:1 preps for planning meetings
  - 1:1 preps for unit meetings
  - 1:1 preps for project-wide meetings
  - Planning meetings
  - Unit meetings
  - Project-wide meetings
    - > fundraising committee
    - > cluster
    - > TOC
    - > sponsor committee
  - Note-taking and recording
  - Staff consulting and training
  - Grant-writing
  - Administration
  
6. Strategic Decisions

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