

PowerCheck: Community Organizing Capacity Assessment Tool

Please Note:

- Key terms throughout the survey (in bold) are defined the **terminology** page on the Alliance for Justice website
- **Instructions** and **information** are available on the website

Introductory Questions: About Your Organization

The questions below ask for basic information about your group or organization.

Name of organization or group: _____

Your title at organization or group: _____

Intro 1: Who is the primary source of information for your survey answers?

- Volunteer Staff
- Board Member(s)
- Executive Director
- Campaign or Program Staff
- Administrative Staff
- It is a group effort
- Other:

Intro 2: Are you filling this out on behalf of: (Select one response)

- One organization
- Two or more separate organizations working together (formally or informally)

Intro 3: What kind of organization are you?

- 501(c)(3)** tax-exempt organization
- 501(c)(4)** tax-exempt organization
- An informal association or **coalition** without tax exempt status
- Other:

Intro 4: What is your organization's approximate budget?

- <\$100,000
- \$100,000-\$500,000
- \$500,000-\$2 million
- \$2 million - \$5 million
- >\$5 million

Intro 5: What best describes the *primary* work of your organization?

- Community Building / Community Development / Community Organizing**
- Service Delivery
- Advocacy**
- Think Tank
- Grantmaking
- Other:

Intro 6: What issues do you work on? (Select all that apply)

- Arts
- Budget
- Campaign Finance Reform
- Child Welfare
- Civil Rights
- Corporate Responsibility
- Consumer Rights
- Criminal Justice
- Defense Spending
- Disabilities
- Education
- Employment
- Energy Policy
- Environment/Climate Change
- Government Accountability
- Housing
- Healthcare
- Immigration/Immigrants' Rights
- Income Maintenance
- International
- LGBTQ Equality
- Reproductive Rights
- Tax Reform
- Transportation
- Voting Rights
- Worker Rights
- Youth
- Other:

Intro 7: Who do you primarily organize?

- Youth
- Adults
- Both Youth and Adults

Intro 7: At what levels do you engage in advocacy? (Select all that apply)

- Local
- State
- Federal/National
- Regional/Multi-State
- Tribal
- International
- Other:

Intro 8: In which states or regions are you working to influence policy? (Select all that apply)

- North America
- South America
- Europe
- Asia
- Africa
- Australia
- All US States
- Select US State(s):

Section 1: Goals, Power Analysis and Planning

Please select the response for each measure that best fits your organization.

Advanced questions are optional. For more information on advanced questions, please click [here](#).

| S1.1 Commitment to Organizing | | | | |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| Introduces basic elements for preparing to engage in community organizing . | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| Staff and board have a shared vision, a common understanding of community organizing theory and practice, and a shared analysis of what's needed to bring about change. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization's mission statement articulates community organizing as a strategy for achieving its social and economic justice goals. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Staff and board have identified their constituents and know their current views on key issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The executive director and relevant staff understand the basic federal and state rules and regulations that govern lobbying, election-related work, and other organizing and other organizing and advocacy activities. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S1.1 Commitment to Organizing: Advanced (Optional) | | | | |
| The organization belongs to or works with a national, regional, and/or state organizing network(s) or training institute(s). | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S1.2 Power Analysis | | | | |
| Assesses the key elements of building institutional power . | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization identifies and profiles its constituent base, possible allies , possible opponents , and other stakeholders related to its issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization identifies and profiles key decision-makers , and those that have influence with them, for its issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Staff understands the political climate and its potential impact on organizing strategies. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Staff understands how race, class, and identity play into the power dynamics of the community being organized. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization assesses its strengths and weaknesses to help determine what roles it might play. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S1.2 Agenda: Power Analysis (Optional) | | | | |
| The organization has long-term strategy to build its institutional power in relation to other powerful stakeholders in its target area. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a long-term strategy to grow its relationships, engagement, membership , and leadership within key constituency groups. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S1.3 Planning and Evaluation | | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| Assesses the organization's processes for strategically planning, identifying, evaluating, and adapting its work. | | | | | |
| The organization has a strategic planning process that includes vision, clear goals, objectives, and outcomes/results for organizing work. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization develops specific campaigns based on the primary concerns voiced by constituents and the power analysis. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization uses appropriate research and analysis to identify issues with specific and winnable solutions. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization seeks out and learns from models of success of other organizations, both locally and nationally. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a plan for raising adequate funds to support its upcoming campaigns and ongoing work. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Staff and community leaders have a process for ongoing learning and incorporate that learning into changes in strategies and other future plans (See RECO for evaluation resources). | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S1.3 Planning and Evaluation: Advanced (Optional) | | | | | |
| The organization seeks out and uses the best available research when identifying and working on its core issues. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a written plan for analyzing the results of its work, including how it has built organizational skills, resources and practices, and for tracking metrics. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Section 2: Empowerment/Constituent Leadership

Please select the response for each measure that best fits your organization.

| S2.1 Constituent Leadership Development | | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| Assesses the extent to which constituents understand community organizing and to which the organization emphasizes leadership development. | | | | | |
| Constituents and the organization have a common understanding of community organizing theory and practice including what is needed to bring about change. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a defined process for developing constituent leadership along a progressive path that incrementally builds skills. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituent leadership represents the diversity of the community and is concentrated in those who are most directly impacted by the issues being addressed. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization uses administrative tools (databases , etc.) to track and monitor constituent engagement and leadership development. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S2.1 Constituent Leadership Development: Advanced (Optional) | | | | | |
| Constituent leaders conduct some meetings, negotiations, and evaluation sessions without the presence of staff. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization actively monitors its leadership breadth/depth and sets goals for expanding the number of leaders and for developing new leadership in key constituencies. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituent leaders conduct trainings for other constituents on the basics of organizing. | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S2.2 Participatory Process | | | | |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| Assesses the extent to which campaign development and implementation involves constituents. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization has a written issue agenda that is developed by constituents. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituents take the lead in developing the strategy and implementation of campaigns. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituents are expected to follow through on work promised and are appropriately held accountable by staff or other constituents when they do not. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituents serve as members and officers of the organization's board of directors, and on committees. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S2.2 Participatory Process: Advanced (Optional) | | | | |
| Constituents chair and facilitate all organizational meetings. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization creates regular opportunities for constituents to share and discuss their reflections on the organization's work through one-to-one meetings, house meetings, or similar conversations. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S2.3 Political Consciousness and Empowerment | | | | |
| Assesses the extent to which organization helps constituents realize their individual and collective power. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization helps constituents recognize their personal power and how that can be used. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization helps constituents develop an analysis of their collective power and how to grow it. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization helps constituents recognize how their individual concerns are connected to the concerns of other individuals and groups. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization helps constituents recognize how the actions of governments, businesses and other institutions are connected to the various issues with which constituents are engaged. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S2.3 Political Consciousness and Empowerment: Advanced (Optional) | | | | |
| The organizational leaders and constituents have a clear analysis of how race, gender, class, and identity intersect with issues of power and privilege. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization helps constituents build solidarity with other organizations, campaigns, and movements engaged in common struggles. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Section 3: Organizing for Change

Please select the response for each measure that best fits your organization.

In this section: for 3.4 Messaging; 3.5 Media Relations; and 3.7 Change Avenues, you will also be asked to what extent you **rely on partners** (other individuals or groups) for some of the work.

| S3.1 Campaign Strategy Assesses how the organization strategizes for campaigns. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization develops a strategic plan for each campaign that incorporates its power analysis. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization develops a set of legally appropriate demands that they believe the decision-makers will respond to. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization plans for how eventual policy wins will be implemented, including either an ongoing role or exit strategy for the organization in implementation. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Campaign strategy is designed to include increasing the membership base of the organization. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.1 Campaign Strategy: Advanced (Optional) | | | | |
| The organization identifies as a key criterion of success obtaining long-term increases of its power (such as strengthening its relationships to an organizing target). | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.2 Activating Stakeholders Assesses how the organization communicates with, educates, and engages its network and the public . | | | | |
| The organization has a network or various networks of individuals and organizations that it can activate to advocate or otherwise collaborate on key policy issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization communicates with its network on the status of efforts, opportunities to engage, messages , and results. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization identifies segments of the public to educate about its agenda. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization conducts phone banks, informational mailings, online communications, and/or canvassing to educate and mobilize its network and gain public support. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.2 Activating Stakeholders: Advanced (Optional) | | | | |
| The organization implements a plan to expand the size and diversity of its networks. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization works to expand the issue knowledge and advocacy skills of those in its networks. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization activates segments of the public to influence decision-makers in support of organizational priorities. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S3.3 Coalition Building/Partnering | | | | |
|---|-----------------------|----------------------------|----------------------------|---------------------------|
| Assesses the extent to which the organization has partnerships—with other nonprofits, businesses, professional associations, etc.—that advance its goals. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization identifies other stakeholders that have similar goals, including those with complementary knowledge and skills, with which it could collaborate. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization participates in coalitions that share one or more of its goals and provide value to the organization. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization actively seeks support for its priorities from its coalition partners . | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization exchanges information with its coalition and other partners as appropriate. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.3: Coalition Building/Partnering: Advanced (Optional) | | | | |
| The organization seeks support from stakeholders who may not be traditional allies but with whom it could partner on a particular project. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization considers race, class, and identity dynamics when selecting allies. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization plays a leadership role in establishing and/or managing a coalition. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization provides leadership to help build a shared vision, analysis, and strategy among diverse coalition partners. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S3.4 Messaging | | | | |
|---|-----------------------|----------------------------|----------------------------|---------------------------|
| Assesses how the organization develops and delivers its messages. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization develops clear, compelling, and concise messages tailored to its targeted audiences . | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization bases its messages and materials on reliable, credible, and up-to-date information. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization identifies and uses effective messengers and spokespeople . | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization chooses a variety of paid and/or earned media strategies to communicate its messages. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | | | | |
| S3.4 Messaging: Advanced (Optional) | | | | |
| The organization conducts polling and focus groups to develop and test effective messages. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S3.5 Media Relations Assesses the extent to which the organization communicates effectively with the media and uses various media to advance its goals. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization monitors media coverage related to its issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization develops and maintains a list of press contacts relevant to its program issues(s). | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization identifies and works with a wide range of media outlets—including online, broadcast, and print media—to communicate its messages. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a written media plan with objectives, targets, strategies, and timelines. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | | | | |
| S3.5 Media Relations: Advanced (Optional) | | | | |
| The organization identifies, builds, and maintains relationships with key personnel in online, broadcast, and traditional media. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has developed a crisis communications strategy for effectively dealing with negative press or an internal crisis. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization generates and distributes its own media content through social media. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.6 Influencing Decision-Makers Assesses the extent to which the organization builds influential relationships with targeted decision-makers. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization monitors the actions of decision-makers related to the organization's agenda. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization builds working relationships with targeted decision-makers by providing information. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization nurtures relationships with decision-makers during times of limited activity. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization builds relationships with elected officials without regard to political affiliations. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.6 Influencing Decision-Makers: Advanced (Optional) | | | | |
| The organization identifies and builds relationships with influential individuals and groups who can persuade decision-makers. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S3.7 Change Avenues | | | | |
|---|------------------------|-------------------------------|-------------------------------|---------------------------------|
| Assesses the extent to which the organization understands where to focus campaign demands and does so. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| Administrative – The organization understands regulatory and enforcement processes, when to focus demands on these processes, and works to influence relevant agency policies and actions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Legislative – The organization understands the legislative process , when to focus demands on this process, and works to influence relevant legislative policy, and where applicable, relevant state or local ballot measure or referenda. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Electoral – The organization understands relevant primary and general candidate election processes, when to focus on these processes, encourages voting, and educates candidates and voters about the issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Litigation – The organization understands how litigation complements other strategies and pursues legal activities such as initiating litigation or signing on to amicus briefs . | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Corporate – The organization understands corporate decision-making processes, when to focus demands on these processes, and works to influence corporations’ policies. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | | | | |
| <i>To what extent do you rely on partners for the four measures above?</i> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.7 Change Avenues: Advanced (Optional) | | | | |
| The organization monitors developments locally, statewide, and nationally in all 5 of the above Change Avenues on its priority issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | | | | |
| S3.8 Action | | | | |
| Assesses how the organization takes organizing action. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization uses escalating, non-violent, direct action tactics to pressure decision-makers, empower constituents, and build public support. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Actions are culturally relevant to constituent groups. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization quickly mobilizes significant numbers of people for its actions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Actions are creative and clearly focused to provoke a desired reaction from the decision-maker. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization engages allies and partners in their actions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.8 Action: Advanced (Optional) | | | | |
| The organization conducts strategic media outreach around its actions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Constituent leadership is trained in the philosophy and practice of nonviolent direct action. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S3.9 Negotiation and Follow-Through Assesses the extent to which the organization negotiates solutions and follows through on implementation of solutions. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization constituent leaders negotiate directly with decision-makers. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization ensures that decision-makers implement the agreed-upon commitments. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization tracks whether the decision-makers' actions result in the intended improvements in the lives of constituents. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization takes credit publicly for the success of its work, when appropriate. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S3.9 Negotiation and Follow-Through: Advanced (Optional) | | | | |
| The organization facilitates the replication of its success in other neighborhoods, cities, states, or on the national level. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Section 4: Community Consensus Building

If you do not engage in this type of work, feel free to skip to Section V. Otherwise, please select the response for each measure that best fits your organization.

| S4.1 Asset Mapping and Stakeholder Engagement Assesses how the organization identifies community resources and engages a diversity of stakeholders. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization inventories a broad range of community assets , including both formal and informal institutions, associations, and leaders. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization identifies how the various community assets are connected to one another. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization engages stakeholders in planning, using the participatory process to represent the full diversity of the community, including race/ethnicity, age, gender, sexuality, language, ability, and religion. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization involves ordinary residents in the planning process as well as institutional and political leaders. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S4.1 Asset Mapping and Stakeholder Engagement: Advanced (Optional) | | | | |
| Stakeholders visit other communities that have successfully engaged in community consensus-building processes. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S4.2 Community Planning Assesses the extent to which organization directs community planning, which is unbiased and considers multiple points of view. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization directs a transparent and democratic planning process. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization makes explicit efforts to create safe spaces where people with positions of power and those without can be heard. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization directs a planning process that is facilitated by a neutral and skilled individual or team. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization provides multiple opportunities for community input in developing plans. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | | | | |
| S4.2 Community Planning: Advanced (Optional) | | | | |
| Community visions are rendered both in text and visually through drawings, maps, blueprints, etc. as they develop. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| There is an explicit process for managing conflict. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S4.3 Community Plan Adoption Assesses how final plans are drafted and adopted. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization directs a process to promote final plans that are comprehensive and compelling. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization directs a process that ensures that community input is evident in final plans. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Plans are presented publicly and in a form accessible to the community. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Plans are endorsed by stakeholders across the community. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | | | | |
| S4.3 Community Plan Adoption: Advanced (Optional) | | | | |
| Plans reflect research on innovative and effective possible interventions to address community issues. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Plans are distributed and communicated broadly across the community to those not involved in the planning process. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S4.4 Implementation and Re-Visioning Assesses how final plans are executed and altered | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
| The organization directs a process that includes concrete steps for implementing plans. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization ensures that there are regular stakeholder meetings to coordinate the work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization finds ways to redirect energies from parts of the plan that are stalled or found to be unrealistic toward work that is more promising. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization ensures that there is a mechanism to alter the plan as the community changes. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>To what extent do you rely on partners for the four measures above?</i> | | | | |
| S4.4 Implementation and Re-Visioning: Advanced (Optional) | | | | |
| The organization provides regular reports on both the successes and failures of implementation to the broader community. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Section 5: Organizational Operations/Infrastructure

Please select the response for each measure that best fits your organization.

| S5.1 Community Connectedness Assess the extent to which the organization has a relationship with the community. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|--------------------------------|---------------------------------------|---------------------------------------|--|
| The organization's office and meeting space are accessible and welcoming to community members. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization and its leaders have institutional and individual relationships in the various communities that they organize. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization leaders are prepared to use organizational resources and reputation to support constituent-led organizing campaigns. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization is broadly known in the community it serves. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.1: Community Connectedness Advanced (Optional) | | | | |
| The organization hires staff from the organization's constituent base. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization builds and leads strategic coalitions and partnerships with a broad array of community organizations, unions, advocates, business leaders, and academics. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.2 Organizational Staff and Board Resources Assesses organization's commitment to professionally supporting staff and board members. | | | | |
| The organization has staff whose full-time job is organizing. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization's plans include the development of staff's organizing skills and practices. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization provides ongoing training, coaching, and mentoring of staff and board members. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization's board has several members representing its core constituents. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.2: Organizational Staff and Board Resources Advanced (Optional) | | | | |
| The organization's management staff is experienced and skilled at supervising organizing work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization sends staff and board to organizing training institutes on a regular basis. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.3 Organization/Constituent Communications Assesses how the organization uses different methods to communicate internally and externally. | | | | |
| The organization uses primary methods of communication in the community, which may include word-of-mouth, flyers, newsletters, local newspapers, congregation and organizational meetings, phone trees, e-mail, website, blogs, and social media. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Staff is able to communicate in culturally and linguistically appropriate ways with individual community residents involved in organizing efforts. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization communicates widely with its constituent base beyond its leadership in order to advance its work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has internal communications systems that keep staff, board members, and other key leaders abreast of developments in the work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.3: Organization/Constituent Communications: Advanced (Optional) | | | | |
| The organization effectively uses a website, blogs, Twitter, Facebook, YouTube, and other social media to advance its message. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has a communication strategy to inform and engage supporters beyond its constituency base. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S5.4 Fiscal Management and Sustainability Assesses how the organization acquires funding and tracks spending. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|--|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organizational budgeting process prioritizes organizing as an integral program area. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has diversified funding streams (grants, individual donations, grassroots fundraising, and membership dues) that support organizing work. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization's financial management system tracks lobbying activities and expenses—as well as funds not allowable for lobbying—in keeping with appropriate federal and state laws. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization has investigated and decided whether to use the 501(h) expenditure test . | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.4: Fiscal Management and Sustainability: Advanced (Optional) | | | | |
| The organization monitors changes to federal and/or state rules that may affect its tax status or way of doing business. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization collaborates with other group(s) to obtain more funding when appropriate. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| S5.5 Funding Community Organizing Assesses how the organization implements its fundraising practices. | Very Strong/ Always | Moderately Strong/ Usually | Somewhat Strong/ Sometimes | Not Strong/ Rarely/ Never |
|---|------------------------|-------------------------------|-------------------------------|---------------------------------|
| The organization has processes to widely involve its members in fundraising activities. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Members and leaders understand their responsibilities to financially support the organization. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization provides training opportunities for staff and leaders in fundraising. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization fosters long-term relationships with individual donors and foundations. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| S5.5: Funding Community Organizing: Advanced (Optional) | | | | |
| The organization uses a modern database to track and target members and donors for fundraising. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization seeks opportunities to inform and educate new funders and donors about the value of funding organizing. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The organization's development staff has prior community organizing experience and training. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Scores by Indicator and by Section

Next, you can score your responses to determine the following information (please note advanced questions are not included in scoring):

- Numerical results for each of the 24 indicators, by section
- Degree to which organization relies on partners
- Numerical results for each section

Don't get too focused on the numbers! The objective here is to identify organizational strengths and weaknesses, and where to build community organizing capacity – not to get the highest score.

Numerical results for each of the 18 indicators, by section:

| Indicator | Score (Does not include scores from Advanced measures) | Degree to Which Organization Relies on Partners (1 – Not Strong/Rarely/Never, 4 – Very Strong/Always) |
|---|---|--|
| Section 1: Pre-Organizing: Goals, Power Analysis, & Planning | | |
| 1.1 Commitment to Organizing | | n/a |
| 1.2 Power Analysis | | n/a |
| 1.3 Planning & Evaluation | | n/a |
| Section 2: Empowerment/Constituent Leadership | | |
| 2.1 Constituent Leadership Development | | n/a |
| 2.2 Participatory Process | | n/a |
| 2.3 Political Consciousness and Empowerment | | n/a |
| Section 3: Organizing for Change | | |
| 3.1 Campaign Strategy | | n/a |
| 3.2 Activating Stakeholders | | n/a |
| 3.3 Coalition Building/Partnering | | n/a |
| 3.4 Messaging | | |
| 3.5 Media Relations | | |
| 3.6 Influencing Decision-Makers | | n/a |
| 3.7 Change Avenues | | |
| 3.8 Action | | n/a |
| 3.9 Negotiation and Follow – Through | | n/a |
| Section 4: Community Consensus Building | | |
| 4.1 Asset Mapping and Stakeholder Engagement | | |
| 4.2 Community Planning | | |
| 4.3 Community Plan Adoption | | |
| 4.4 Implementation and Re-Visioning | | |
| Section 5: Organizational Operations/Infrastructure | | |
| 5.1 Community Connectedness | | n/a |
| 5.2 Organizational Staff and Board Resources | | n/a |
| 5.3 Organization/Constituent Communications | | n/a |
| 5.4 Fiscal Management and Sustainability | | n/a |
| 5.5 Funding Community Organizing | | n/a |

Numerical Results for each section:

| Section | Score (Does not include scores from Advanced measures) | Degree to Which Organization Relies on Partners (1 – Not Strong/Rarely/Never, 4 – Very Strong/Always) |
|---|---|--|
| 1 - Pre-Organizing: Goals, Power Analysis, & Planning | out of 60 | n/a |
| 2 - Empowerment/Constituent Leadership | out of 48 | n/a |
| 3 - Organizing for Change | out of 152 | |
| 4 - Community Consensus Building | out of 64 | |
| 5 – Organizational Operations/Infrastructure | out of 80 | n/a |

Strengthening

After reviewing the above results, please select two to three areas in which your organization may want to strengthen organizational advocacy capacity and/or capacity from partners.

For help in choosing areas to strengthen, please click here.

Section 1: Pre-Organizing: Goals, Power Analysis & Planning

- Commitment to Organizing
- Power Analysis
- Planning and Evaluation

Section 2: Empowerment/Constituent Leadership

- Constituent Leadership Development
- Participatory Process
- Political Consciousness and Empowerment

Section 3: Organizing for Change

- Campaign Strategy
- Activating Stakeholders
- Coalition Building/Partnering
- Messaging
- Media Relations
- Influencing Decision-Makers
- Change Avenues
- Action
- Negotiation and Follow – Through

Section 4: Community Consensus Building

- Asset Mapping and Stakeholder Engagement
- Community Planning
- Community Plan Adoption
- Implementation and Re-Visioning

Section 5: Organizational Operations/Infrastructure

- Community Connectedness
- Organizational Staff and Board Resources
- Organization/Constituent Communications
- Fiscal Management and Sustainability
- Funding Community Organizing

Thank you for using



for organizational assessment

It is recommended that you complete the entire tool again as needed, or at least every 18 months.