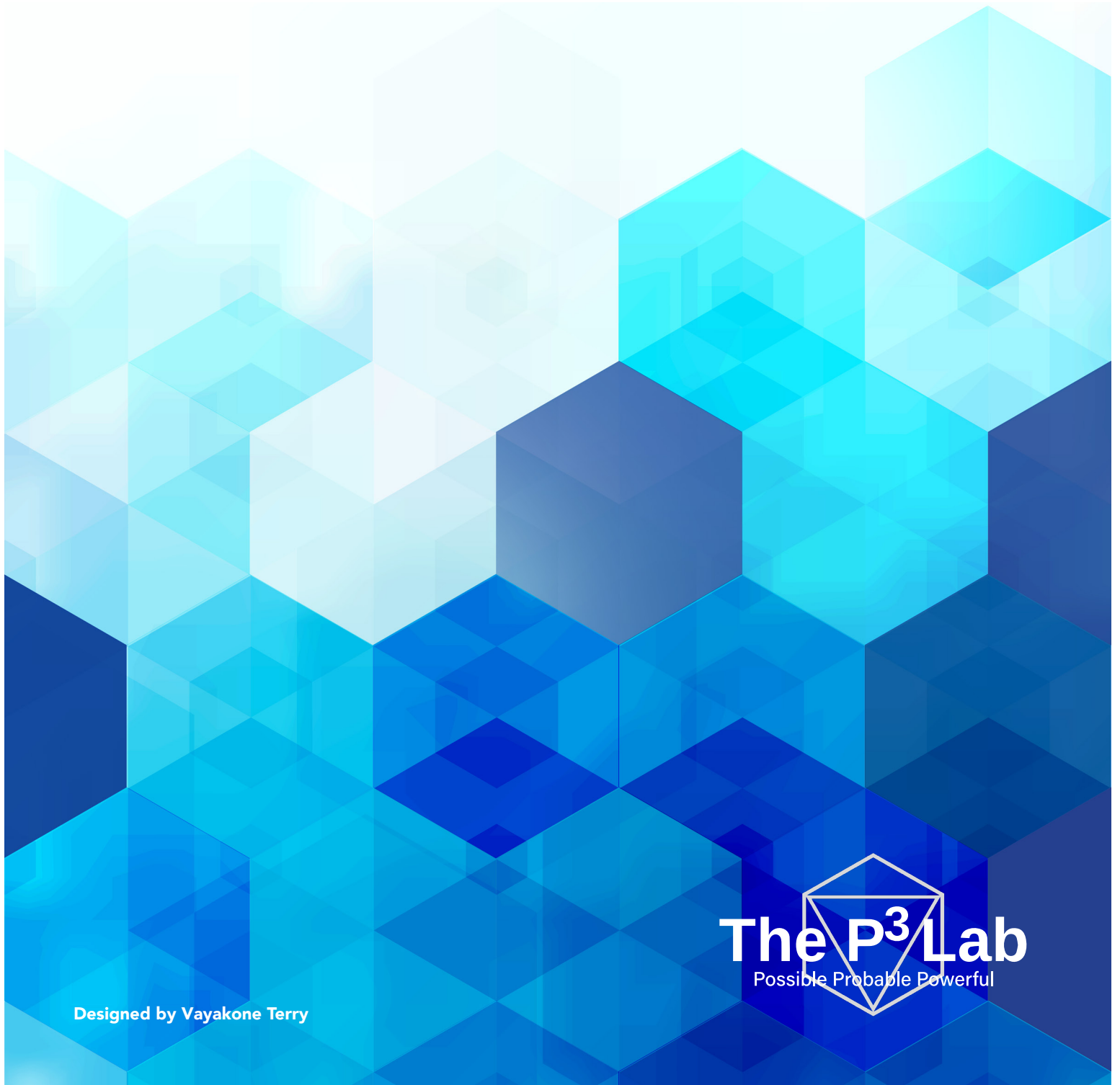


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Understanding Strategic Capacity In Constituency-Based Organizations

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Strategic capacity represents the ability of an organization to think about how to manage its resources and capabilities in pursuit of its strategy.





Project Background, Goals, and Key Findings

Movement organizations work in inherently uncertain political environments. Whether an organization is advocating for a new minimum wage, working to close a private prison, or seeking to influence an election, the terrain they are operating on shifts nearly every day. That is increasingly true as political uncertainty rises in the 21st century, particularly for historically race-class subjugated communities. Consequently, any movement-based organization seeking to build, exercise, and win political power must have sophisticated strategic capacities to be able to navigate these uncertain, dynamic, and constantly shifting political environments. Yet, our knowledge of how movements can nurture the kind of strategic capacities that allows them to build constituencies and leadership that can operate in the flexible ways needed for these dynamic circumstances is limited.

This project, undertaken by the P3 Lab at Johns Hopkins University in partnership with the Movement Capacity Building Team of the Chan Zuckerberg Institute, seeks to summarize research about strategic capacity from a range of different disciplines. Scholars in management studies, social movement studies, labor studies, organizational behavior, and economics have all researched how strategic capacity operates in business firms, public sector organizations (e.g., agencies, government corporations, etc.), unions, movements and movement organizations, and other non-profit organizations. These literatures, however, frequently are not in conversation with one another, and the learning is not shared across those domains.

This report seeks to synthesize what is currently known across disciplines about organizations that successfully build and wield strategic capacity, with a particular eye toward how it might apply to constituency-based organizations. The report concludes with an assessment and facilitated conversation guide to support movements and movement organizations in understanding how developed (or not) their strategic capacities are. Those interested in the methodological details of this project can find this information in **Appendix A**.

In looking across these literatures, we find that strategic capacity is the ability of an organization to adapt to uncertain and dynamic power environments in a way that moves it closer to achieving its goals. It is largely a function of two core capabilities:



LEARNING: does the organization have systems to learn about the changing world, the changing needs of the constituency, and the changing opportunities it has to act on the world?



RESOURCE ADAPTABILITY: can the material and non-material resources of the organization be flexibly adapted to meet the organization's changing needs?

This report defines these concepts in greater depth, and highlights the functions, practices, and processes organizations should invest in to enhance its strategic capacity.



Why Strategic Capacity?

Power itself is dynamic, relational, and context-specific.

An Approach to Measuring & Understanding People-Power

This investigation of strategic capacity is grounded in an effort to help movements learn how they can better build power for their constituencies. We focus on strategic capacity because it is fundamental—yet under-valued—in the effort to engage in any power-building work. Many organizations prioritize tactical skills over the kind of capabilities described below. Tactics may, at best, help an organization achieve short terms goals but contribute very little to bringing about and sustaining power and success in the long term.

As described in the P3 memo, *An Approach to Measuring & Understanding People-Power*, **power itself is dynamic, relational, and context-specific**¹. If the outcome that organizations are seeking to achieve (power) is dynamic, then organizations must be similarly dynamic to win and hold onto the power they seek. Indeed, organizations of all kinds must learn to adapt to the changing power dynamics in which they operate in ways that allow them to achieve their goals.

Strategic capacity determines the extent to which organizations can adapt strategically—or not—when knocked off balance by any of the myriad obstacles that can emerge in frequently changing social and political contexts. Change is hard. Power does not easily give up power. Particularly for movements representing race-class subjugated communities, challenge is inevitable. Such unexpected challenges can sometimes serve as a knockout blow for organizations that lack the strategic capacity to adapt. In contrast, organizations with high strategic capacity are more likely to anticipate the challenges, react in the moment, and proactively react. All of these abilities increase the likelihood of an organization building power for the long-term. In the next section, we detail what strategic capacity is before breaking down the two core capabilities that generate it, as well as what organizational practices and features contribute to the enhancement of those capabilities.

¹ Han 2021



What is Strategic Capacity?

Strategic capacity represents **the ability of an organization to think about how to manage its resources and capabilities in pursuit of its strategy.**

Strategic capacity is the ability of an organization or movement to adapt to changing power dynamics in ways that help it move closer to achieving its goals. Strategic capacity interacts with an organization's resources, capabilities, and strategy. Resources are material and non-material goods (e.g., campaign money, membership, staff, volunteers, etc.) that organizations mobilize in order to advance their agenda. Capabilities are sets of processes and routines that organizations use to transform inputs into outputs². Strategy "denotes the planning of a whole campaign or war, in contrast to the tactics deployed in a single battle."³ Strategic capacity then represents the ability of an organization to think about how to manage its resources and capabilities in pursuit of its strategy. It requires strategic thinking that is "reflexive and imaginative, based on how leaders have learned to reflect on the past, pay attention to the present, and anticipate the future."⁴

In some contexts, the most effective strategies and tactics to support a successful outcome are relatively straightforward. In seeking to reduce a flu outbreak, vaccines can directly reduce the number of contagious people and consequently deaths from the flu. In cases like this, the relationship of inputs (the vaccine) to

outputs (reduced contagion) to outcomes (reduced illness and death) moves over relatively predictable terrain. Effective vaccines act on universal aspects of human biology to reduce the incidence of illness or disease. In the work of building people-based power, however, the relationship of inputs to outputs to outcomes is much more variable—because humans all act agentially, it is hard to find universal social regularities in the same way universal laws of biology determine how the human body acts. As a result, movement-based organizations deploy inputs in dynamic and unpredictable situations. Thus, they must move beyond rigid strategies and lists of tactics to respond to changing circumstances with flexibility by building what are called "strategic capacities."

Three Key Principles of Strategic Capacity

Because we focus on strategic capacity as it enhances or inhibits an organization's ability to generate political power in a dynamic, unpredictable and highly contingent context, it is worth calling attention to three aspects of strategic capacity that frame this report.

² Collis (1994).

³ Hyman (2007), p. 198.

⁴ Ganz (2000), p. 1009.

1. **FIRST**, strategic capacity becomes most important when organizations find their power challenged. Many movements and organizations have strategic plans at the outset of their campaign. The true measure of strategic capacity emerges, however, when things do not go as planned, when they are challenged in ways they did not expect. Strategic capacity is the overall ability of the organization to think and act collectively in response — that is to say, strategic capacity is what allows organizations to gather themselves for a counterstrike or a strategic defense.⁵ **It requires seeing opportunities and threats that others do not, the ability to challenge narratives, the skills to mobilize and re-combine existing resources, the ability to acquire new ones, and so on.**

2. **SECOND**, strategic capacity is a property of *collective* units. **It should reside within organizations, not just individuals.** The danger of relying on just one effective, visionary leader is that the strategic capacity of the organization is too dependent on one person. Instead, organizations with the best strategic capacities harness the interplay of individuals coming together as a collective.

3. **THIRD**, strategic capacity is about managing uncertainty. This means that strategic capacity is not, and cannot be, a boilerplate checklist of routines for organizations to follow. There is no one-size-fits-all approach to building strategic capacity. Rather, **judgment is required to leverage an organization's strategic capacity in a way that best serves the particularities of any given situation** that an organization is confronting. So, while strategic capacity is collective, individuals – typically leadership – still play a large role in putting it into action and supporting its development.

This report aims to synthesize evidence about the organizational choices that underlie strategic capacity and have a broad base of evidentiary support. Given the tremendous variety of contexts and structures differentiating one organization from the next, there is no guaranteed path to achieve strategic capacity. Instead, organizations must weigh the most relevant types of capabilities and supporting structures for them.

Capabilities are sets of processes and routines that organizations use to transform inputs into outputs.³ **Strategy** “denotes the planning of a whole campaign or war, in contrast to the tactics deployed in a single battle.”⁴

3 Hayman (2007), 4 Ganz (2000)

5 This definition is closest to that provided by political scientists Teles and Schmitt (2011) but is essentially the same as that provided by sociologists Ganz (200) and Levesque and Murray (2010), as well as business and management scholars Teece et al. (1997) and Eisenhardt and Martin (2000).



Two Core Capabilities Of Strategic Capacity

Across diverse disciplines and subfields, two core capabilities consistently emerged as being fundamental to enabling strategic capacity in movement-based organizations: learning and resource adaptability.

Within each capability, we identify the kinds of organizational choices that support it. These choices represent concrete opportunities for organizations to invest in building infrastructure to support strategic capacity. Many of these capabilities and potential choices will seem familiar to movement-based organizations, such as a commitment to diversity or non-hierarchical decision-making models. The key is to understand their

relationship to each other and strategic capacity, so that organizations can make intentional decisions about if and how to invest in them. Additionally, in some cases we identify organizational choices that will support both learning and resource adaptability. We've included them in both places to demonstrate the intentionality needed for these practices to translate into either learning capabilities or the ability to adapt resources to meet the moment.

We review each of these capabilities and the things that define them in greater detail throughout the remainder of this report.



LEARNING CAPABILITIES

Learning capabilities refers to an organization's ability to recognize, make judgments about, and, if appropriate, apply new learnings. This capability is widely recognized across disciplines as essential for strategic capacity.



RESOURCE ADAPTABILITY

Resource adaptability refers to an organization's ability to acquire, mobilize, and, most importantly, *re-organize* resources to adapt to challenges and opportunities, instead of utilizing old habits or plug-and-play campaign strategies.

FIGURE 1.
Choices to
Build Learning
Capabilities



Learning Capabilities

Research shows that across many different types of organizations, the ability to detect new challenges, deliberate about them, develop effective responses, and unlearn responses that are ineffective is fundamental to organizational effectiveness.⁶ That said, developing learning capabilities is more complex than simply incorporating evaluations or hiring a data manager – although these are important steps. In this section we’ll lay out different types of learning before identifying key choices organizations face.

Organizations need the ability to engage in three key types of learning:

- **FIRST**, an organization must be able to look around its environment to assess what is changing and what is static. In the business management literature, this is often referred to as an organization’s ability to “sense.”⁷ Gathering information in this domain can take several forms, including deliberate ones such as actively seeking out information from well-regarded

sources or by setting up in-house research and development programs, as well as serendipitous ones like surfacing learning from programs during debriefs. Organizations use their sensing capabilities in order to learn about emerging opportunities and threats alike, how the world around them might be changing, and what needs their constituencies might have.

- **SECOND**, organizations must be regularly assessing new potential resources, tools, and tactics that might support their goals. This can mean reimagining what constitutes a resource, and the extent to which the (sometimes undervalued) resources constituencies hold can be turned into assets for the organization. It can also include updating existing tactics or adopting entirely new tactics or tools to replace an outdated approach. For example, in canvassing, organizations have increasingly layered tactics such as peer-to-peer texting or targeted social media ads on top of their doorknocks.⁸

⁶ Hyman (1997), p. 199.

⁷ In particular, we are drawing on the “dynamic capabilities framework.” See, for example, Teece (2007) and colleagues.

⁸ As an example of different canvassing approaches being shown to be more effective than others, see Kalla and Broockman (2020).

THIRD, organizations need to be able to collectively interpret and synthesize the new information to support learning across the entire organization.⁹ To make learning collective, organizations should have mechanisms to disperse it throughout the organization.

What organizational choices can support this kind of collective learning?

Democratic Governance Structures and Practices

Democracy and collective decision-making are often core values for movement-based organizations. Research shows that the ability to apply these values to internal governance practices is not only nice-to-have; it's essential to learning.¹⁰ Building collaborative decision-making practices in an organization is a function of both structure and culture.

An organization's governance structure refers to the way organizations make internal decisions – especially regarding who and how many people are meaningfully involved in those decisions. A democratic governance structure includes broad and authentic participation in decision-making across management, middle management, other staff, and volunteer members in the strategic planning, tactic development, program evaluation, and other processes.¹¹

Building structures that invite active participation from people across the organization strengthens the ability to sense a wide range of opportunities and threats, as well as the ability to leverage the vast and diverse knowledge of the full organization. Organizations should encourage engagement from those who don't possess traditional expertise in a particular area, as such

practices help guarantee a constant sharing of fresh viewpoints and knowledge. Coupled with leadership's deliberative oversight and sound judgment to adjudicate between competing ideas, participatory governance practices increase the likelihood of better, more creative decisions. People should be incorporated in decision-making not only at moments of rapid response but also while developing strategy. Often, strategic thinking "is least likely when there is a homogenous leadership group deeply embedded in bureaucratic routines."¹² Organizations should break out of those tendencies.

The dividends of integrating strategic input from outside the top brass are such that many different kinds of institutions have integrated participatory practices.¹³ Facing pressure to adapt to tremendous internal and external changes around the turn of the century, the U.S. Navy piloted Appreciative Inquiry (AI), "a tool for connecting organizations to their positive change core by opening every strength, innovation, achievement, imaginative story, hope, positive tradition, passion and dream to systematically [sic] inquiry."¹⁴ Inverting the typical top-down strategic planning and problem management process, AI involves engaging almost all organizational members to take "the best of 'what is/ was 'from each participant and joins these ideas together to stimulate a collective imagination of 'what can be.'"¹⁵

Younger officers and personnel who participated described being trusted as transformative and having enhanced their confidence that they indeed contribute to a larger mission and higher purpose.

Admiral Vernon Clark, Chief Naval Officer has since become an evangelist of "whole system in the room approach" to large-scale strategic planning.¹⁶

No one-size-fits-all design for democratic governance emerges from the literature, but there are agreed upon

9 Broadly, we are using Huber (1991)'s framework of organizational learning.

10 For example, in the sociology literature focusing in trade unions, see Levesque et al. (2005), Hyman (2007), Heery (2005), Milkman (2006) and Offe and Wisenthal (1985), and in the business management literature see Hamel (1996) and Manville and Ober (2003).

11 Hyman (2007).

12 Hyman (2007), p. 199.

13 Saxton, (2011).

14 Tripp & Zipsie, (2002), p. 13.

15 *Ibid.*

16 Tripp & Zipsie, (2002), p. 41; Cooperridge, (2012).

principles to keep in mind. Organizations should build structures that facilitate broad participation, treat participants as agents instead of data points for input, center values of community, and invest in a culture of accountability. Participatory structures should be designed to minimize hierarchy and engage all levels of staff and volunteers in decision making processes. In smaller organizations, it may be possible to routinely involve virtually everyone who desires to participate in the decision-making process. In larger organizations, however, this may be unfeasible. Large organizations can still be democratic, however, by rotating the group of individuals involved in decision making. In this model, a leader lends their experience and skills to setting the agenda or facilitating the deliberations, rather than unilaterally making decisions. Additional ideas for democratic governance processes for large groups include preset limits on speaking times to ensure no one person dominates, or using secret ballots following discussions if a group has failed to reach consensus.

In movement contexts, democratic governance often includes empowering those experiencing injustice to direct strategy and campaign efforts.



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING DEMOCRATIC GOVERNANCE ARE:

Who is involved in decision-making? Are people treated as data points for input, or are they engaged in an authentically participatory process?

What systems and processes enable participatory decision-making?

How are people encouraged and cultivated in becoming authentic partners in a participatory governance process?

The Deep South Center for Environmental Justice (DSCEJ)

The Deep South Center for Environmental Justice (DSCEJ) published a series of case studies highlighting successful community-based efforts to dismantle existing or defeat proposals for new polluting facilities in Louisiana’s “Cancer Alley,” an 85-mile stretch of the Mississippi River home to more than 150 heavy industrial facilities. In one example, the Concerned Citizens of Norco fought for fifteen-plus years to get Shell/Motiva to address the extreme health risks its refinery posed. The Black residents of the Diamond neighborhood, some of whom lived within 10 feet of buildings emitting noxious fumes and particles, were especially endangered. The campaign, which won an historic victory in 2002 when Shell paid to relocate Diamond residents, established partnerships across the state and attracted support from national figures such as Greenpeace and Congresswoman Maxine Waters. Importantly, though, the presence of legal experts and professionalized nonprofits did not dissolve the group’s commitment to local, community-led directives. The case study closes: “It is important to note the command that Ms. Richards [the Norco resident community members elected to lead the group] and Concerned Citizens of Norco had in directing the assistance offered by allies so that each partner organization or individual worked in service of the Diamond community and not the other way around.”¹⁷

¹⁷ DSCEJ, (2020). P. 7, emphasis added

Clear Lines Of Accountability

Building clear lines of accountability across an organization – constituencies included – is an important factor in learning and resource adaptability. This means that organizational leaders are truly responsive to the base an organization is building and the collective vision of the organization rather than making decisions unilaterally or responded to an unelected board, for example. “Organizations have to be grounded in their constituencies and have mechanisms of communication and accountability in place to know what the changing needs of the constituencies are.”¹⁸ In some organizations, accountability is a function of culture and practice. In other organizations, it is built into the structure of governance itself. In general, research shows that having structural lines of accountability mean that when push comes to shove, leaders are more likely to stay authentically accountable to their constituents. Such practices of accountability allow constituents and staff across hierarchy to challenge misguided processes, bad decisions, and misbehaviors that threaten the organization and its community. It supports strategic planning that reflects the needs of the constituency. Finally, it deepens the investment of the base.

To build accountability, organizations need to center values of community and focus on developing a shared identity. These foster a sense of collective ownership

over the organization’s destiny, and keep people engaged even as decision-making processes become contentious. Ideally, people who are part of the organization – including staff and members – should understand the organization as being inseparable from the community of people who comprise it, rather than as a simple physical manifestation in which people show up, take orders, go home, and then repeat the process the next day. Accountability is also valuable from an organizational morale and talent retention point of view.

“The objective is not to get people [those who comprise an organization] to support change but to give them responsibility for engendering change, some control over their destiny” because, after all, a democratic strategy making process “is not simply about the right to be heard; it is about the opportunity to influence opinion and action.”¹⁹

Historically in the United States, organizations were more likely to have structures designed to ensure that organizational leaders would stay accountable to constituents’ interests. This included practices like (a) having elected leaders, who were accountable to the base because their positions depended on it, and (b) local, state, regional, and national conventions in which constituents would collectively gather to determine the organization’s priorities for the coming year.²⁰ These types of organizational practices diminished in the final decades of the twentieth century as direct mail and

“The objective is not to get people [those who comprise an organization] to support change but to **give them responsibility for engendering change, some control over their destiny.**”

¹⁹ Hamel (1996), pp. 75-78

¹⁸ *Ibid.*

¹⁹ Hamel (1996), pp. 75-78

²⁰ See Lipset 1952; Clemens 1997; Skocpol, Ganz and Munson 2000; Andrews, et. al 2010; Skocpol 2003.



mass media enabled “armchair activism,” organizations shifted from organizing to mobilizing strategies, and the kind of widespread participation needed to make elections and conventions worthwhile declined.²¹ Even now, however, some organizations maintain a tradition of deep accountability to the base, which enables a kind of strategic flexibility that is distinct from organizations whose leaders are more accountable to funders or an unelected board.

Accountability intersects with many of the other choices facing organizations. For instance, without accountability, internal democracy is unlikely to have any positive effects. Deliberative decision making and governance should be carried out in a consistent, fair, and timely fashion.

Moreover, decision making processes that take place following deliberations need to be made transparent.²²

Strategic Coalitions and Collaboration

No matter the area of literature, networking among organizations with shared values and goals is associated with a litany of benefits. Building such coalitions isn’t just about increased influence; they provide a great conduit for learning as well.²³ Indeed, some scholars go so far as to claim that learning from others is “the whole point” of collaboration.²⁴

Organizations have different specialties and strengths, which translates into specialized knowledge their partners may lack. Collaboration allows organizations to diversify their knowledge by absorbing that of others, which provides organizations greater flexibility to respond to changing circumstances.²⁵ Importantly, this occurs even when mutual learning is not an explicit goal of organizations involved in a collaboration – for example, research shows that knowledge about tactics diffuse between organizations simply from co-engagement in events and other actions.²⁶ Recent work focusing on constituency-based organizations has made the case that organizations with diverse tactical repertoires are better equipped to adopt even more new tactics because they have better developed the practice of identifying and learning new strategies. In other words, learning through collaboration begets more learning in the future.²⁷



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING CLEAR LINES OF ACCOUNTABILITY ARE:

To whom does the organizational structure make leaders structurally accountable?

From whom does the organization generate the material resources it needs, and how does that affect accountability?

Are there mechanisms for developing a culture of shared commitment that hold leaders accountable?

21 Skocpol 2003; Schier 2000.

22 Manville and Ober (2003).

23 Levesque and Murray (2005).

24 Hamel (1989).

25 Bearman and Everett (1993) and Lin et al. (2007).

26 For a discussion, see Wange and Soule (2012).

27 Wange and Soul (2012).

Until We Are All Free

Until We Are All Free is a racial justice initiative rooted in arts and culture that began in California in early 2015. In an example of a Cultural Strategy intervention, Until We Are All Free “works with artists across disciplines and leaders across sectors to break down the walls that separate us and challenge the incarceration, deportation, and detention of our communities.”²⁸ Power California, a statewide network of grassroots organizations mobilizing young voters and their families from communities of color and Indigenous Nations for civic engagement, reflected that participating in the effort emboldened and prepared its staff to push for a greater emphasis on culture-driven strategies alongside the traditional electoral work. The then co-director noted: “The easy answer to ‘Why culture?’ is that we can’t make the scope and scale of transformative change that we want in governance, especially structural changes that redistribute power, without Cultural Strategy.”²⁹ The collaboration also shaped the organization’s internal structure; Power California ended up creating its first-ever Cultural Strategist position in 2017. Comments from the first person in that position illustrate how participating in that campaign shaped the organization’s understanding of its own theory of change: “Civic engagement without a Cultural Strategy won’t create the world that we need because then we’re not shaping culture though it is the foundation of everything we believe and practice.”³⁰

The key here is not only that Power California learned about a new strategy from the coalition work—but also that they took the time to synthesize and integrate that learning in a long-term shift to their power-building approach.

Collaboration also improves organizations’ sensing capabilities. Having a robust network allows organizations to not only keep their own ears to the tracks, but also to tap into the knowledge network of others who are also monitoring their environments.

Finally, to be successful at coalitions, organizations need to invest in capacity for navigating the differences across organizations. Each group is likely to come to the table with different identities, tactics they focus on, demands, and interests, which may be in contention with one another. To foster collaborative actions, organizations must mediate between these contrasting factors and would be wise to build skills on their teams to support these relationships.³¹



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING STRATEGIC COALITIONS AND COLLABORATION:

With whom are organizations choosing to be in coalition with?

Do key leaders have time to do the coalition building and ancillary learning they need?

What mechanisms exist to carry learning from these coalitions to the organization?

How often does the organization practice incorporating new tactics, habits, or routines?

²⁸ untilweareallfree.org/about-us

²⁹ Sen, N. (2019), p. 9.

³⁰ *Ibid*, p. 10

³¹ Compa (2004) and Levesque and Murray (2010).

A Diverse Team

Like values around democracy, diversity and equity are also central values of many movement-based organizations. Yet these same organizations often struggle to live out those values internally. This gap between so-called values and action not only opens them up to charges of hypocrisy, it also undermines the ability to learn and adapt.

Fundamentally, greater diversity within a collective should increase ideas and perspectives, which should in turn increase the likelihood that effective ideas and observations emerge.³² Benefits of diversity are greatest when it exists not just in entry level positions, but in leadership, where it reduces the number of potential blind spots that hinder decision making and, ultimately, progress. This is an especially important point to reflect on considering that over-representation of white cisgender men has characterized leadership among American constituency-based organizations and social movement organizations, much like virtually all other types of organizations, historically and to the present day.³³ As summarized by Marshall Ganz, “encounters with diverse points of view and ways of doing things thus facilitate innovation ... whether based upon one’s life experience ... or the experience of a group.”³⁴

The learning advantages that diverse organizations enjoy may be particularly pronounced in uncertain environments or during highly disruptive moments caused by an unforeseen event. In these contexts, the problem(s) at hand may themselves be largely unprecedented, and solutions are likely to emerge from non-traditional bases of knowledge.

Finally, recalling that strategic capacity is organizational rather than individual, we note that diversity is about the overall culture of the organization rather than individual attributes. To be most powerful, it needs to interact with the other facets of learning related to meaningful

democratic governance, collective identity, accountability and the ability for team members to try new things through experimentation.



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN THINKING ABOUT BUILDING DIVERSE TEAMS:

Whose voices are centered within the organization? How does this vary across different levels of the organization?

How are differences handled? What mechanisms or habits for negotiating difference exist?

Learning-Oriented Data, Analytics, And Experimentation

Learning systems require data. The choice that organizations face is what kind of data to focus on and how to incorporate it into their work. Organizations undertake an often-dizzying number of actions, amassing an equally dizzying amount of data. Yet they lack structures to collect and analyze data related to core goals, like information about who is in their base and what they are doing. The data manager is siloed. Organizations are easily overwhelmed or distracted by big numbers that have little to do with their strategy.

A significant body of work across literatures demonstrates that a robust information and data gathering and analytics infrastructure is associated with strategic organizations.³⁵ It has become an increasingly important component of decision-making processes in the business and government sectors.³⁶

The key here is building learning infrastructure that is tied to an organization’s goals and strategic processes. While technology for collecting, sorting, and visualizing data has proliferated and become more affordable, analytics

³² Ganz (2000).

³³ See, for example, Terriquez (2015) and Bebbington and Ozbilgin (2013).

³⁴ Ganz (2000), p. 1012.

³⁵ Germann et al. (2014).

³⁶ In business, for example, see Hagel (2015), whereas for governance see Abbarno and Bonoff (2018).

infrastructure does not end with the purchase of a powerful CRM or data storage protocol. Organizations need to first ensure that they are collecting data that is useful and, secondly, that they have the know-how to be able to analyze that data. By useful data, we mean data that facilitates directly assessing the performance of a given program in terms of the goal it is meant to accomplish. By data know-how, we mean that **organizations should have staff who are literate in data analysis so that the data can be leveraged fully.**³⁷ Connecting the two, this points to the need for capable data staff who are deeply grounded in the organization's goals and strategies rather than isolated or interacted with transactionally. A 2010 survey of 116 nonprofit organizations showed that 98 percent of respondents said their organizations collected a lot of information. But one-third reported that "they were unable to reflect on it and integrate it in a meaningful way into program activities."³⁸

Next, organizations have much to gain by integrating experimentation into their daily work. This includes the staff capacity to run tests as well as a high degree of comfort with trying new things, admitting that an assumption was wrong, and learning from what results show.

38 Degrees

An analysis of 38 Degrees, one the United Kingdom's largest and more active civil society organizations, for instance, deconstructed the role of the "Testing Whiteboard." An object around which brainstorming sessions elevated the crucial organizational question for each week, the whiteboard enabled a set of routinized strategic conversations that otherwise would not occur. It promotes a culture of testing, which leads activists to question old assumptions and try out novel strategies."³⁹

37 Kiron et al. (2014) and Wamba et al. (2017).

38 Saxton, A. (2011).

39 Karpf, (2016a), p. 17.

40 Achtenhagen et al. (2013).

41 Brown and Eisenhardt (1997).

42 Karpf (2016b).

Normalizing these processes and being intentional about creating space to complete them also encourages the sharing of new ideas across units of an organization, which further enhances learning.

Experimentation allows organizations to compare the effects of competing ideas and approaches under different conditions and to move toward the more effective tactics. Organizations can engage in trial-and-error learning without investing significant resources in launching an unknown program.⁴⁰ Team members focus on current projects while simultaneously developing a sense of where to go next using insights gleaned from experiments.⁴¹

Finally, building a culture of data, analytics, and experimentation is an excellent example of how these structures connect to each other to build learning capabilities overall. A solid data infrastructure should be integrated into strategy development. The data manager should be included in campaign and capacity for metrics should be focused on progress toward core goals of the organization. Data can then inform – not replace – the kind of face-to-face conversations that deepen shared values and solidify commitment to a group's cause.⁴²



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING DATA, ANALYTICS, AND EXPERIMENTATION FOR LEARNING:

Does the organization have a system for tracking the quantitative and qualitative data it needs to enable learning? Is that data system, and the people who lead it, integrated into the strategic decision-making of the organization?

Do all metrics allow the organization to directly assess whether progress is being made toward its goals?

Does the organization have a culture of experimentation, of trying new things and ensuring it does not get stuck in mindless habits?

Resource Adaptability

The second key to strategic capacity is the ability to effectively develop and deploy resources in order to explore, learn, and adopt new tactics from external and even internal resources.⁴³

Once organizations have sensed new threats or opportunities in their environments, they must be able to mobilize and reconfigure existing resources or, if needed, develop new resources to respond to them in timely fashion. This may seem obvious, yet not all organizations are equal in their ability to do this – it is a capacity that must be purposefully developed.

The ability of the organization to adapt its resources nimbly in response to changing strategic imperatives is a function of structure, interdependence, collective identity, commitment and strategic partnerships. We review each in turn below.

Operational Flexibility

Across multiple bodies of scholarship, perhaps the most frequently appearing word in studies related to strategic capacity is “flexibility.” Flexibility in operations and programmatic work facilitates quicker detection of threats and opportunities, as well as faster reorganization of resources to address them.⁴⁴ Even if investing in flexibility is costlier up front, it pays to do so in the medium to long run.⁴⁵ Successful organizations move beyond naming flexibility as a value to build structures and processes that support flexible adaptation.

Operational flexibility flows from strategic flexibility. In conducting the day-to-day business of the firm, there are competing goals to balance, and sometimes the means to achieve a goal may prove inimical to the achievement of other goals. Strategic trade-offs abound:

FIGURE 2.
Choices to Build Resource Adaptability



managing tensions between short-term and long-term objectives, between building power and deploying power, between efficiency and flexibility, and between routines and innovation. Management scholars often refer to the processes needed for strategic flexibility as ambidexterity and simultaneity. Ambidexterity refers to an organization’s ability to navigate these trade-offs and adjust accordingly. Simultaneity (also known as the “semi-structures” approach) recommends that organizations embrace the tensions inherent in simultaneously seeking things like both efficiency and flexibility.

43 Cohen and Levinthal (1990).

44 See, for example, Hyun and Ahn (1992), as well as Gerwin (1993).

45 Van Mieghem (1998).

The research identifies several ways in which organizations can make choices about the organization of relationships between team members, teams, and skillsets, and the flow of information and capacities across the organization. Some key enabling pre-requisites or “enabling conditions for organizational flexibility include:”⁴⁶

- **Clarity and collective buy-in on organizational mission and theory of change:** A clear definition of organizational mission, strategy, and theory of change helps to build commitment from the team, a culture of accountability, and, importantly, provides a consistent north star even as the organization adapts to changing conditions.⁴⁷ There needs to be widespread understanding throughout an organization, not merely among a small subset of its leadership, of how the campaigns’ pieces fit together in a larger strategy. This makes shifting in response to new conditions smoother and more intuitive across an organization.
- **Structures and processes built to manage competing tensions:** To build ambidexterity and simultaneity, organizations need structures that are able to manage the tension between things like centralization and decentralization, between routines and innovation. Organizations need to have enough decentralization and autonomy to allow for multiple conduits for risk-taking, innovation, and the emergence of unknowns.⁴⁸ The key here is moving beyond saying “we value risk taking” to creating intentional space for it in a workplan.⁴⁹ For example, rather than calendaring-out every detail of a campaign plan, an organization might protect the capacity to seize a sudden moment of cultural importance or set aside a portion of an organizer’s workplan for rapid response. Larger

organizations might even have programs or even entire departments devoted to experimentation and devote substantial attention to managing the tension between competing goals in one’s organization.⁵⁰

- **Co-Specialization or Interdependence:** Strategic unbalancing is a term management literature uses to refer to intentionally maintaining flexibility as organizations grow (since organizations tend toward increased rigidity as they mature). As an organization adds staff, it may hire people with seemingly duplicative skillsets or roles. This ensures shared knowledge across an organization. “When organizations need to restructure or remake themselves in response to changing needs, that change is made easier when there is co-specialization or interdependence, between organizational units. People within distinct units need to have relationships with and expertise in how the other units work, making it easier to take groups apart and reconfigure them.”⁵¹ Some people may interpret this recommendation as being about redundancy; the key here, however, is not redundancy but instead creating interdependence across individuals within teams so that reconfiguration of resources is easier when change is needed.

Putting all of these pieces together, some management scholars argue that flexibility can be operationalized in four basic ways: (1) Adaptive flexibility: “defensive or reactive use of flexibility to accommodate unknown uncertainty”; (2) Redefinitional flexibility: using flexibility proactively to increase uncertainty for opponents; (3) Banking flexibility: setting aside material resources to create room for flexibility in moments of flux; (4) Reduction flexibility: relying on temporary staff or partnerships for flexibility.⁵²

46 Wageman et al. (2005).

47 Battistella et al. (2017), Han and Argyle (2016), and Milway and Saxton (2011).

48 Brown and Eisenhardt (1997).

49 Eisenhardt et al. (2010, p. 1264).

50 Eisenhardt et al. (2010).

51 Han and Argyle (2016, p. 16).

52 According to Gerwin’s (1993) framework, as summarized in Beach et al. (2000, p. 43).



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING OPERATIONAL FLEXIBILITY INCLUDE:

Is there clarity about our mission and theory of change across staff and members? Does collective buy-in exist on mission and strategy?

Do our structures and processes enable the appropriate balance between centralization and decentralization, between innovation, risk, and routines?

Are our teams organized interdependently? If we had to reorganize ourselves, are the appropriate relationships, knowledge bases, and skill-sets shared across the organizations?

Organizational Culture And Collective Commitment

Organizational culture is central to resource adaptability: organizations need to foster a belief, grounded in reality, that the organization values change and adaptability. In addition, they need to have commitment among their relevant constituencies. As Han and Argyle summarize, "Organizations are better able to react nimbly to change when their staff is committed and loyal. These traits make people more willing to adapt to change."⁵³ Establishing a culture that embraces change and fosters commitment encourages personnel to get on board more quickly than one where adaptiveness is an afterthought, or a topic broached only under duress. This is important as the more quickly that a team member takes up enacting necessary change, the greater the chance to be effective.⁵⁴

53 Han and Argyle (2016), p. 16.

54 Milway and Saxton (2011) and Teles and Schmitt (2011) and Ganz (2009).

55 Cossyleon and Flores (2020), Ganz (2009), and Levesque and Murray (2010).

56 Battistella et al. (2017).

Collective organizational commitment motivates people to fight for the causes of one's organization, including when circumstances force an organization to adapt. In these circumstances, changing priorities and tactics, while necessary, can be difficult and exhausting, especially if the change is taking place under challenging conditions – as when plans are derailed, or an organization faces defeat. It is important to recognize that this is likely to be the case not just for management but for all levels of an organization. Strong collective commitments make it more likely dedicated and motivated staff will soldier through difficult periods of change.⁵⁵ Whether it's picking up slack or step into new roles, this dedication from staff and volunteers lends substantial flexibility to organizational leadership tasked with re-configuring in response to changes in the political environmental.⁵⁶

These commitments are often rooted in people's commitment to each other, not their commitment to the cause. As a result, the key to generating commitment is not just about the analysis of the problem or building narratives for change. Nurturing collective commitment requires a latticework of relationships within which people are nested to sustain those commitments.



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER AS THEY THINK ABOUT BUILDING A SHARED ORGANIZATIONAL CULTURE AND COLLECTIVE COMMITMENT ARE:

Do we have the necessary latticework of relationships among our staff, leaders, and constituents to cultivate, nurture, and sustain the commitments people need to each other?

Do we model and enact a commitment to adaptability and change, so that change is inherent to how people interact with the organization, instead of coming as a surprise?

Strategic Coalitions And Collaboration

In addition to supporting learning capabilities, building networked relationships across organizations increases resource adaptability by enhancing both efficiency and efficacy, ultimately producing what some scholars call strategic agility.⁵⁷ Alliances allow partners to coordinate their responses to changing circumstances, which allows organizations to choose from a broader menu of responses.⁵⁸ For example, in response to a frustrating decision by an elected official, coalition members could issue a joint statement or could choose to complement each other with one organization going on attack while the other offers a more tempered response.

Building coalitions across organizations is notoriously hard, however. Many coalitions fracture or become nothing more than thin alliances on paper. Scholars have highlighted a variety of strains on coalitions, including conflicts between coalition work and organizational maintenance, a neglect of indigenous organizing, tensions between national and local organizing, and the achievement of a coalition's public policy goals.⁵⁹ Three major themes, however, emerge from the literature. First, competition between organizations for resources—whether money or activists—can lead to conflict and must be carefully and intentionally managed. Second, shifts in the coalition's political environment can place its members at odds with one another. Third, ideological divisions create cleavages along which coalitions might divide. Managing all of these dynamics requires explicit commitment and intentional discussions on all sides.

Relatively little research examines the strategic choices that coalition leaders can make to offset these forces. One notable exception, a study of the pro-choice movement, offers three solutions to problems arising from resource scarcity. First, flexible membership arrangements can allow member organizations to

select into varying degrees of participation. Second, coalitions can use resource scarcity to their advantage by focusing on joint projects that require resources beyond what any individual member possesses. Third, external funding can ameliorate interorganizational competition over resources.⁶⁰ Some scholars argue that coalitions can mitigate turf battles by reaching a “domain consensus”—an agreement among coalition members regarding the “skills, competencies, tasks, and prices of the partners to the exchange.”⁶¹ Such consensus allows organizations to achieve “cooperative differentiation,” in which groups play complementary roles in service of a shared goal.⁶² Finally, because ideological divisions are more likely when groups share few activists, scholars find that overlapping memberships produce strong bonds between organizations, perhaps increasing such alliances’ resilience to external strains.

Dakota Access Pipeline

Protests against the Dakota Access Pipeline in North Dakota illustrate how alliances can multiply tactical possibilities and increase access to resources during long-lasting disruption efforts. Local Sioux tribes — on whose land the proposed pipeline would traverse and potentially spill crude oil — spearheaded the Water Protectors alliance, which included different Indigenous groups, activists, nations and non-Indigenous allies. Although the various viewpoints and identities indeed demanded negotiating, most assessments ascribe to the coalition a remarkable degree of solidarity and cohesion. Networking locally (e.g., with

57 Battistella et al. (2017).

58 Battistella et al. (2017) and Lin et al. (2007).

59 Staggenborg 1986; Jenkins and Eckert 1986; Kleidman and Rochon 1997; Mische and Pattison 2000.

60 Staggenborg 1986

61 Zald and McCarthy 1987

62 Krinsky and Reese 2006



Photo by Vlad Tchompalov on Unsplash

non-Indigenous farmers) as well as across the country (e.g., with existing campaigns to pressure divestment from oil companies) helped Water Protectors, “develop defense mechanisms against strategies deployed through the petro-state.”⁶³ For instance, online fundraising tapped into global Indigenous, environmental and land rights networks to generate material support for site-based efforts (the Protectors set up a camp as headquarters on a proposed site to physically disrupt construction and to illustrate their role as guardians of the resource), including bail and legal funds for Water Protectors arrested during civil disobedience. At the same time, the composition of the alliance meant it could leverage networks with additional tactical approaches — such as suing the companies building the pipeline — and access to diverse mass communication strategies: “Indeed the massive mobilization of resources for camp supplies to sustain the blockade against the combined resources of the state and the industry would not have been possible without an enormous degree of intertribal and Indigenous/non-Indigenous solidarity.”⁶⁴



SOME KEY CHOICES FOR ORGANIZATIONS TO CONSIDER IN BUILDING STRATEGIC COALITIONS AND COLLABORATIONS:

Do we have the right relationships with other organizations that enable us to innovate on the tactics, strategies, and resources we need?

Do the coalitions we join have mechanisms for managing internal conflict, competition over resources, and disagreements about strategy?

Do we discuss with our coalition partners the different resources we bring to the table, roles we might play, and how they complement one another? Is this assessment incorporated into campaign planning?

How are the coalitions and networks we are part of connected to our constituency? How is our constituency connected to other members of the network or coalition?

63 LeQuesne (2019, p. 197).

64 *Ibid.*



Review and Next Steps

Strategic capacity increases the likelihood of organizations consistently achieving power in a dynamic political arena. Our research highlights two core capabilities that support strategic capacity for organizations to consider: learning and resource adaptability, with key choices organizations face to intentionally build these capabilities.

Strategic capacity is collective —something that must be built and nurtured at the organizational level rather

Outstanding Questions

We deliberately **avoided discussing organizational factors such as budget size, age, issue area or theory of change** in our review of the building blocks of strategic capacity. Our review of evidence and experience in movement spaces suggests organizations of all kinds have room to improve on each of the practices above. That said, such organizational characteristics certainly

Key questions about the way race, class, and other forms of intersectionality shape... strategic capacity are fundamental and as yet unanswered.

than prioritized in leaders alone. Our decision to use “built” and “nurtured” is a deliberate one, and it’s worth dwelling on this for a moment. Many of the organizational choices that we identify as critical are ones that most organizations would likely claim they already value. But **valuing an idea is not the same as its deliberate, ongoing application.** Rather than choices that can be made once and forgotten, we view the pursuit of strategic capacity as a practice that requires intention, iteration and reflection on the processes central to the organization’s functioning. To realize strategy capacity, organizations must be intentional about investing time and resources to build these capabilities.

While the literature we have synthesized here clearly shows us that there is much that we already know about strategic capacity, there is plenty that remains unknown. In conclusion, we’d like to look at potential future areas for study as well as a tool for how organizations might apply this research to assess their own strategic capacity.

interact (or even create friction with) efforts to nurture the capacities above. It’s unclear, for instance, how organizational learning unfolds at a start-up grassroots organization created with democratic governance from the onset versus a more mature organization trying to transition away from a legacy of hierarchical management.

One particular question that arises in the context of movement organizations is the extent to which some of these features may vary by the type of constituency an organization engages. Because much of the literature on strategic capacity emerges from the management literature, less attention is paid to questions of constituency. Yet, in movement organizations, key questions about the way race, class, and other forms of intersectionality shape the ability of an organization to enact practices related to strategic capacity are fundamental. Further research can explore this.

Valuing an idea is not the same as its deliberate, ongoing application.

Additionally, the literature suggests that coalitions of organizations can generate more power for a specific cause than a group working in isolation. The *cross-organizational* capacities and infrastructure necessary to build strategic capacity at the network or movement level, however, are still being investigated. Relatedly, social movements comprise organizations of all kinds. We need more data on how partnerships between and among organizations with uneven learning or resource adaptability capacities maximize strengths. Studies show that groups indeed learn tactics from alliances, but can mismatched capacities complement one another in the context of a campaign or long-term power building effort? Or do fundamentally different approaches to decision-making or experimentation hinder rather than empower partnerships?

Finally, recognizing that many of these characteristics are difficult to measure, we are interested in exploring how we can know strategic capacity when we see it as well as surfacing the steps to build these capacities.

How Can Organizations Apply This Research?

As we described at the beginning of this report, strategic capacity is intrinsically connected to the ever-changing terrain on which movement-based organizations are contending for power. Consequently, there's no one-size-fits-all package to support organizations in building strategic capacity. We believe that completing an agitational assessment that supports organizations in having conversations about how they are (and aren't) building and wielding strategic capacities is a useful step forward.

Ideally, processes and values necessary to cultivate the capabilities outlined here would be built into an organization from the outset, including budgeting, the build-out of staff and initial program strategy. We recognize that for older organizations, though, tackling strategic capacity gaps might begin with an assessment of a segment of the strategic plan or a few core operations. The literature offers little guidance about *when* in an organization's lifecycle such an assessment is most powerful. As such, we encourage constituency-based groups to initiate these conversations with regularity and, whenever possible, to holistically access how to foster commitment and build processes to support the concepts emphasized here.

You can find the assessment and facilitated conversation guide below in **Appendix B** or at www.P3ResearchLab.org.

Organizations must be intentional about **investing time and resources** to build capabilities.



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Appendix A: Research Methodology

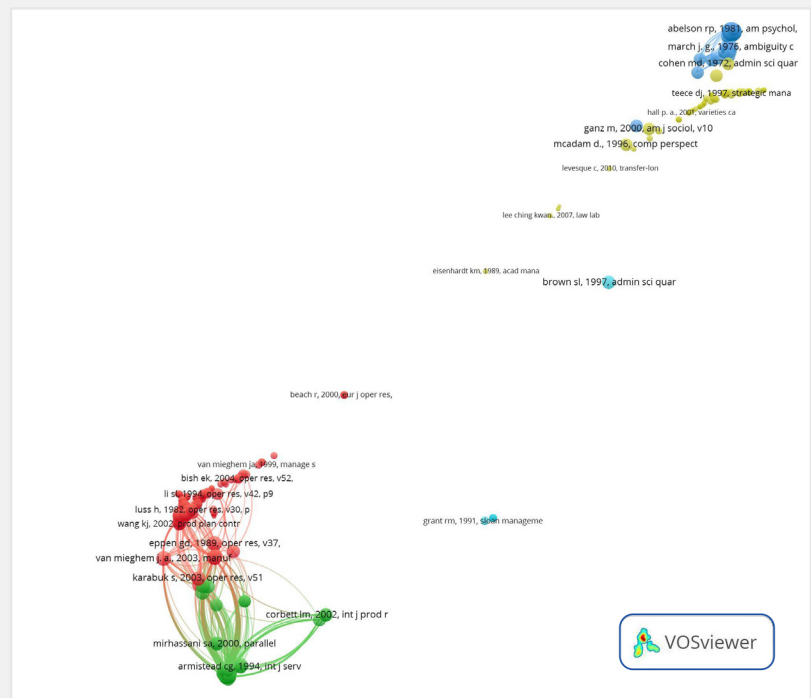
Our project adopted a multifaceted approach. First, we began with a set of 10 relevant studies in management, labor studies, sociology, and political science that members of our team already knew about. Using these as a starting point, we tracked the citations in these articles to identify other works. We repeated this process 5 times with each new batch of studies that we identified. Ultimately, we identified 36 books and articles dealing with some aspect of strategic capacity.

Second, to capture scholarship that might be outside our own lens on strategic capacity, we used general scholarly databases to map the citation networks of a large sample of the literature related to strategic capacity. First, we entered the search terms “strategic capacity” and “dynamic capabilities” (a common term in management studies) into the Web of Science database. This yielded 6,086 articles spanning a broad range of disciplines, including management, economics, operations research,

applied psychology, and public administration. We then exported the citation information from those articles into a tab-delimited data file. Next, we imported that data into VosViewer, a software tool used to construct and visualize bibliometric networks. VosViewer enabled us to map citations from all of the papers that were cited five times or more.¹ The maps plot the “association strength” between papers. Association strength is a measure of the co-occurrence of frequencies of citations – that is, how often citations appear together in the 6,086 articles that we analyzed.² The association strength between citations is visualized on the citation maps using distance. The closer two citations are on the map, the stronger their association strength. The number of times that a given article is cited across all papers is visualized by the size of its corresponding node on the map. **Figure A1.** The map for the search on the term “strategic capacity” is below:

Figure A1:
Strategic Capacity Map

Caption: The figure above depicts all citations cited by 5 or more sources in all papers related to “Strategic Capacity” in the Web of Science databases. Each node represents a distinct citation. Citation nodes that are close together are cited frequently in the same papers, whereas those that are far apart are cited together less seldomly (or never). Larger nodes have been cited more than smaller nodes. Overall, this figure depicts that there are multiple distinct and disparate literatures on strategic capacity, ranging from sociology and political science (blue and yellow clusters) to business management and manufacturing (red and green).



1 While we acknowledge that this threshold (as with any other alternative threshold) is an arbitrary one, we imposed it for two reasons: 1.) to make the number of citations we analyzed manageable; 2.) to help eliminate irrelevant citations on the front end.
2 For a more detailed discussion, see Van Eck and Waltman (2007).

Figure A2: Dynamic Capacity Map

Caption: The figure depicts all citations cited by 5 or more sources in all papers related to "Dynamic Capabilities" in the Web of Science databases. This literature is largely confined to business management and closely related subfields. Each node represents a distinct citation. Citation nodes that are close together are cited frequently in the same papers, whereas those that are far apart are cited together less seldomly (or never). Larger nodes have been cited more than smaller nodes. Overall, this figure shows that scholarly research focusing on dynamic capabilities is very cohesive and largely focused on the same subject matter, unlike the literature on strategic capacity (see Figure A1), and political science (blue and yellow clusters) to business management and manufacturing (red and green).

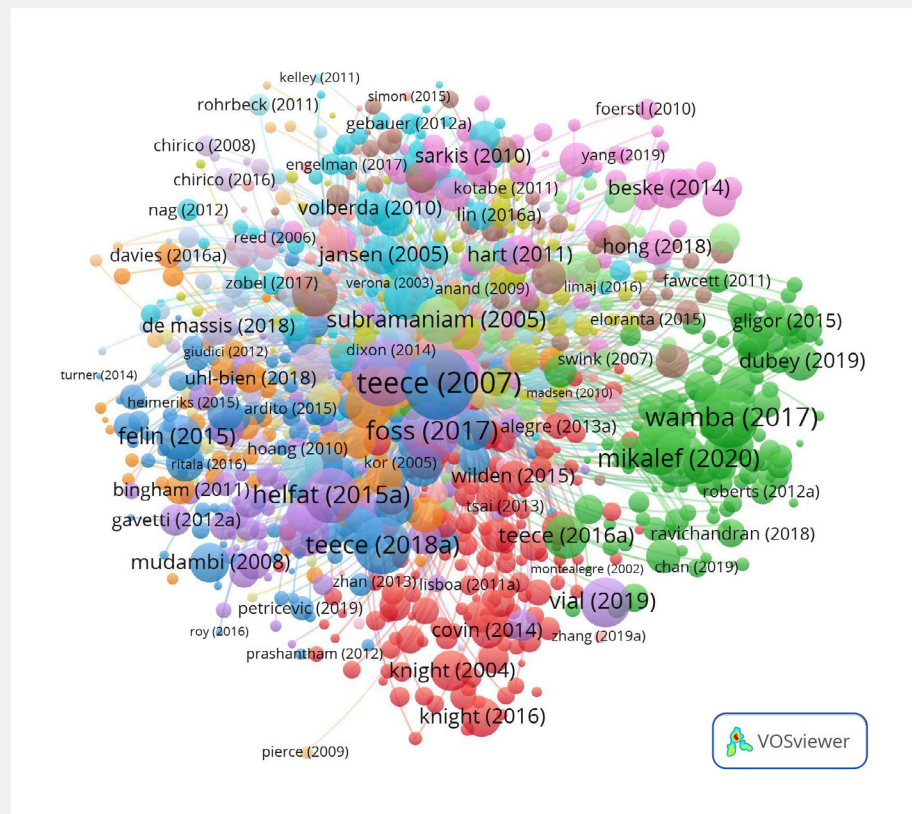


Figure A2. The map for the search on the term “dynamic capabilities” is above.

The citation mapping process helped identify literature outside our own immediate circles of knowledge and provide greater confidence that we were not missing any large bodies of work related to strategic capacity.

After producing the citation maps, we used them to investigate additional areas of scholarship. Studies that we had already read and deemed relevant were on the map and became our starting points. From those articles, we worked “outward” through the map, directing our attention first to larger nodes. If the paper corresponding to that node was relevant, we examined smaller connected nodes. We read the titles and abstracts of several hundred papers to make a judgment regarding relevance that ultimately yielded 72 additional papers that we read in full. The key criterion used to determine relevancy was whether the article focused on explaining why some organizations (e.g., businesses, labor unions,

government agencies, etc.) were more successful than others. Through these papers, we surfaced organizational choices the authors identified as contributing to strategic capacity.

Throughout this process, we carefully tracked the differences between constituency-based groups and other types of organizations when determining which lessons were likely to apply to building strategic capacity in constituency-based organizations. For example, the business and management literatures are the most thoroughly developed regarding strategic capacity. We were especially sensitive to the ways in which the profit-driven nature of business may be out of step with the transformative civic and/or political goals of constituency-based organizations, particularly when it comes to concepts such as “efficiency.” That said, this review yielded significant learnings that are relevant to many different types of organizations and can be applied to constituency-based power building contexts.

Appendix B: Assessing Your Organization's Strategic Capacity

As leaders working to build power centered in people, we know that you regularly weigh the most important types of capacity to build. Should you invest in digital organizing or data capacity, add additional organizers to your team, or build out operations structures? Once you have those organizers on board, what kind of training is most important for them to have?

We also know that you're all too familiar with how rapidly a campaign can change and how a tactic that had an enormous impact one year is less powerful the next. Given the inherently uncertain terrain that you're operating on, there is no guarantee that one type of capacity lead will to the outcome we want – the power to win meaningful changes in our community's lives.

Instead, research across multiple disciplines and sectors demonstrates that organizations that focus on strategic capacity ahead of tactical skills are ultimately more powerful.

This assessment is an agitational, reflective tool designed for teams and organizations to build a shared understanding of and investment in strategic capacity,



This assessment was created by the P3 Lab at Johns Hopkins University, a team of researchers and organizers seeking to understand how we can make participation across race and class possible, probable, and powerful. We worked with the support of the Movement Capacity Building Team at the Chan Zuckerberg Institute. This assessment is part of a larger report which synthesizes what we know from research on strategic capacity across multiple disciplines. There are many definitions of strategic capacity out there, and we are not trying to create the perfect one. Instead, we tried to identify key elements that were consistent across multiple scholarly literatures (We encourage you to read the full report at www.P3ResearchLab.org.)

while taking an honest look at how effectively you have (or have not) already built the practices and processes likely to help cultivate strategic capacity and identifying how to prioritize your time going forward. It will work best for people-powered organizations that have a mission, vision, and theory of who their people are and why people matter in making change in place.

There are two major parts to this assessment:

1. **An individual survey** that people complete to reflect on their understanding of a set of organizational practices and processes that make the emergence of strategic capacity more likely
2. **A collective meeting** in which people learn about strategic capacity, look at the survey responses as a whole, and identify areas to focus on in the coming year.

We hope that this assessment will drive honest and productive – if potentially tension-filled – conversations across your organization and look forward to hearing from organizers as you dive into the world of strategic capacity.

You will need:



Copies of the “Understanding Capacity in Constituency-Based Organization” Report/Survey

Copies of the “Understanding Strategic Capacity in Constituency-Based Organizations” report & individual surveys for your team – participants should read the description of the research on strategic capacity before filling out the survey on paper or at our website.



A Trusted Facilitator Outside the Organization

The conversation will work best when facilitated by someone outside the organization. This could be a person from a trusted organization or an organizational coach. If not, identify someone within your team other than the Executive Director who will guide the conversation.



A Six-to-eight-hour Session

Block time with your team to discuss results of the survey and what they mean for your priorities. For large organizations, invite a representative swath of your organization. Organizations with fewer than 30 people on staff should invite the full team.



Clarity on Who Should Participate in Assessment

Ideally both paid staff and volunteers at every level of the organization who exercise leadership in any capacity. In most cases, this should involve your full staff and a set of members. At minimum you will need to include people across different levels of the organization. If you are a smaller organization with just one or two staff members, be sure to invite your board and members to fill out the survey.

Facilitation Guide: Unpacking Survey Results

This next section is intended to support an individual or pair in sharing the assessment and facilitating a session to understand what the survey results are saying about the organization and its strategic capacity.

We’ve laid out three phases of work – grounding for yourself, sharing the survey, and the facilitated session.

Overall, the purpose and outcomes of this process are:



DESCRIBE: Build a deeper understanding across your team of strategic capacity, its importance, and the choices connected to it;



EXPLAIN: Develop a shared assessment of your organization’s own strategic capacity and why or why not you have certain strengths and weaknesses;



ACT: Identify where to prioritize your efforts in building strategic capacity in the coming year.

Phase I: Learning About Strategic Capacity & Preparing

This first part of your work is focused on your own understanding of strategic capacity and preparing the logistical components of the process. This will ensure that you can confidently facilitate the session, drawing on both the research as well as your own experiences, and that you are able to create a calm and clear space for people to engage in this process.

- ✓ **Your own learning:** Read the report www.P3ResearchLab.org and the summary [chart](#) below that lays out the capabilities we are seeking to cultivate to build strategic capacity. Reach out to the P3 Lab team if you have questions or would like to discuss.

- ✓ **Set your timeline:**

Week 1	Share the individual surveys on Monday.
Week 2	Individual survey reminders & deadline on Friday.
Week 3	Review the survey results and incorporate what you find into your preparation.
Week 4	Six-to-eight-hour session scheduled for a time that is accessible to a range of people.

- ✓ **Identify roles:**

- » **Facilitator:** This person is responsible for the overall process. Your role is to ensure that you and the organizational leadership are on the same page about the purpose and structure of this process, to clearly share information with participants, to understand the survey responses, and to lead the facilitated session.
- » **Co-Facilitator:** If more than 15 people will be at the in-person session, you will want to invite someone to facilitate with you.
- » **Organizational Leadership:** This person or people are responsible for sharing with their team that the how and why of this process to ensure buy-in.
- » **Survey Analyst:** This is someone who will take the lead on compiling the individual survey results and organizing them into displays that can be shared with the group for the collective meeting. Basic skills in working with spreadsheets are helpful.



ASSESSMENT NOTES

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P3 Lab Contact Information:
 Need to chat? Contact Jane Booth-Tobin, jboothtobin@jhu.edu

.....
Set your timeline checklist:

Week 1	
Week 2	
Week 3	
Week 4	

.....
Identifying Roles

 Facilitator Name

 Co-Facilitator Name

 Organizational Leadership

 Survey Analyst

- ✓ **Identify participants:** Who will you invite to participate in the individual survey and facilitated session?
 - » **Staff:** The full staff of an organization should be invited to participate in the individual survey. At organizations with a staff of less than 30, the full team should be invited to the facilitated session and strong attempts should be made to find a date that works for almost the entire team. At larger organizations, select a representative range of participants to join the facilitated session. Above all, ensure that people across roles and hierarchy have filled out the survey and attend the facilitated session no matter the size of the organization.
 - » **Members:** Invite a range of committed members, including board members and active volunteers to complete the survey. From those people, invite a few to join the facilitated session.

- ✓ **Decide how you'll field the survey:** We encourage you to have participants fill out the individual surveys at our [website](#). This will allow for easier distribution and analysis. You will have the option of sharing your results with the P3 Lab to support our continued research on strategic capacity and potentially receive support analyzing the results or keeping your results private. If you'd prefer, you can distribute the printed version of the survey below and capture handwritten results.
 - » As you decide how to field the survey, **you also need to make a decision about whether or not you want to ask people to share their results anonymously or not.** People should not be able to opt in or opt out; instead you should make a collective decision that all responses will be anonymous or all responses will not be anonymous. The question of anonymity only matters for whether people will share their results with their names attached to it in the collective reflection discussion.

There are pros and cons to consider with anonymity. Having people identify their own results means that you can have a more focused discussion about the patterns that you see emerging from people's responses. What if all the volunteers feel one way and paid staff feel the other? What if all the BIPOC people feel one way and white people feel another? Knowing who is saying what can often lead to a more focused discussion. This is only possible, however, in an organization that has enough trust that people feel like they can offer their honest responses without fear of reprisal in any way. The main con to consider in having people share their identities, thus, is the question of whether people will change their responses to the survey based on knowing that their results will be shared publicly.

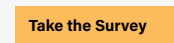
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Identifying Participants

Staff:

Members:

Click the button to be taken to our website to take the survey.



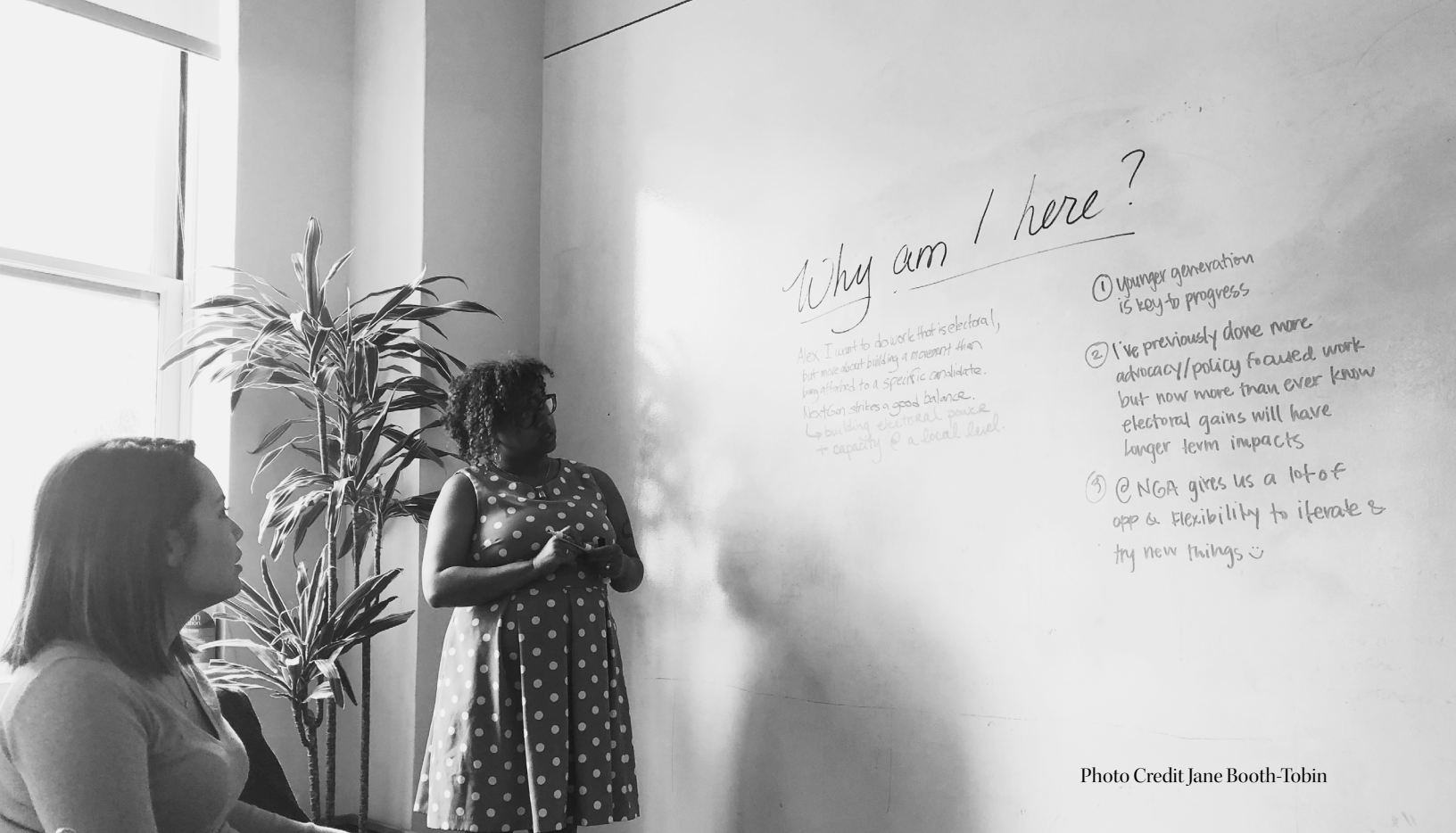


Photo Credit Jane Booth-Tobin

Phase II: Sharing the Survey

Once you feel grounded in what strategic capacity is and the choices an organization faces when deciding how to build it as well as the logistics prepared for the survey and session, you are ready to share the survey with participants.

At this time, you'll need:



[Communication to participants](#)



The survey itself, either [printed](#) or accessed at www.P3ResearchLab.org



[Survey Analysis Guide](#)

COMMUNICATIONS TO PARTICIPANTS

Thoughtfully inviting staff and members into this process is an essential step in making this a valuable tool for the organization. This phase allows people to ground themselves in what strategic capacity is, to understand this process as a trustworthy one where they can be honest, and to focus specifically on strategic capacity rather than the organization as a whole.

We encourage you to begin by sharing background information at a team meeting or via email. After the team meeting, invite supervisors to discuss the process with their staff either in one-on-one check-ins or smaller team meetings.

Here is a sample email introducing the process that could also serve as a guide for a conversation at an all-staff meeting:

New Message

Sender: Organizational Leader

To: Organizational staff, members, and board

Cc: Facilitator(s)

Subject: Building our strategic capacity

Hello team!

I'm writing today to share about a process that we're going to engage in over the coming months to better understand our organization's **Strategic Capacity**.

What do I mean by strategic capacity? Our ability to adapt to changing power dynamics in ways that help us move closer to achieving our goals. In many ways, it's more important than any tactical capacity we could build. It's an interplay of our resources, our capabilities, and our strategy. It's about our whole team, not just my abilities as a leader. And it's intangible, there's no checklist we can follow to build it and say that we're done.

A research team at Johns Hopkins University called the P3 Lab – focused on making participation of our people possible, probable, and powerful – has recently completed a study synthesizing what we know about this type of capacity and how organizations like ours can build it by investing in our ability to **learn** and **adapt**. They've also built out an assessment to help us get on the same page about what strategic capacity is, the capabilities that support it, and how to prioritize what we do next.

As an important part of our organization, we're asking you to participate in this process by filling out an individual reflection and joining a collective conversation on [DATE facilitated by NAME]. [If not being invited to the facilitated conversation, share that there will be a conversation, be transparent about who is participating, and identify how results will be shared.]

The first step is the individual assessment. It will take about 30 minutes to complete. The survey is not anonymous as a key part of our learning will be about how different people understand and experience our organization based on their role, background, or identity. Please be as honest as possible, even if what you have to share might create tension within our team. We're prepared to work through that tension with FACILITATOR'S support. [IF YOU'VE OPTED FOR ANONYMOUS RESULTS: We've decided to keep survey results anonymous. This will give us less visibility of patterns that emerge from people's responses but allow for a level of honesty we didn't think people would be comfortable with otherwise.]

At our facilitated session, we'll dive deeper into what strategic capacity is, how learning and the ability to adapt support it, and what our individual assessments of these different areas tell us about our current strategic capacity. Then we'll work together to identify where we should focus our energy in the coming year to build strategic capacity.

You can find the survey here [LINK OR ATTACHMENT]. Please complete it by DEADLINE.

Be in touch with FACILITATOR or me if you have any questions or ideas.

In solidarity,

NAME

Send



UNDERSTANDING THE SURVEY RESULTS

Before the facilitated session, the facilitators should work with the survey analyst to review the survey results using these [charts](#) to get a sense of what the organization is facing and might need to prioritize. As you read the results, questions to consider might be:

1. Do any patterns emerge of areas where they are thriving? What about areas where they have less developed capabilities?

2. Do you observe any outliers or disconnects across the organization? Are there themes to these outliers based on type of role, position in the organization, or identify?

3. Where do you see areas of agreement across the organization, and where do you see areas of disagreement? In areas of disagreement, are their systematic characteristics that differentiate people who agree and disagree with each other?

.....

Survey Analysis Notes



Photo Credit ISAIAH

Phase III: Facilitated Session

Now you are ready to convene people for the facilitated session! You will need:



Materials:

- ✓ Flip charts
- ✓ Painter's tape
- ✓ An easel
- ✓ Post-it notes in 4 colors
- ✓ Pens
- ✓ Fidget toys
- ✓ Nametags
- ✓ Printouts for participants of full [survey](#) results
- ✓ Printed [notecards](#) with the definitions of capabilities from the chart below. You should have 10 total – learning capabilities and the five areas beneath, resource adaptation and the three areas beneath. Be sure to list the broader capability that it connects to. For example, “Learning: Internal Democracy”.



Survey Results:

Using these [spreadsheets](#), print packets for each participant that lay out the results by individual. Add any key categories that you might have included in the survey, such as senior leadership. (Note that even if you have chosen anonymity, we recommend laying them out one-by-one with a number assigned to each person so that you're able to see outliers.)



Space:

Ensure that you have a quiet and spacious room for the session with round tables and space for people to have small group discussions. Set up the following flip charts:




- ✓ Agenda
- ✓ Community agreements (*blank until developed together*)
- ✓ Parking lot
- ✓ Reflection questions in each section: keep these folded up and hidden until you arrive at that section



Snacks & Meals

Grab fuel that align with the timing of your session.



SECTION FOCUS & TIMING	FACILITATOR'S NOTES
<p>Grounding 45 minutes</p>	<p>Purpose: People are thoroughly welcomed into the space with a clear understanding of what to expect throughout the day. People begin to get in touch with their hopes for expanded strategic capacity to ground them in tense moments.</p> <p>Welcome: Start the day by introducing yourself and how you came to be part of the process. Ideally you can share a story about how you have thought about and wielded strategic capacity in the past.</p> <p>Visioning: Invite people to close their eyes if they feel comfortable. Envision a moment where everything shifts in a campaign. How do we want to respond together? How might we prepare for that moment? Really encourage them to imagine the organization operating with power, connectedness, and joy. Invite them to also imagine the ways they don't yet live up to that vision. Identify a hope they have for today about how they might close that gap.</p> <p>Introductions: Go around the room and invite people to share their name, pronouns, connection to the organization, and something from their reflection.</p> <p>Review the day: Walk through the purpose outcomes for the day and review the agenda.</p> <p> DESCRIBE: Build a deeper understanding across your team of strategic capacity, its importance, and the choices connected to it;</p> <p> EXPLAIN: Develop a shared assessment of your organization's own strategic capacity, and why and why not we have particular strengths and weaknesses;</p> <p> ACT: Identify where to prioritize your efforts in building strategic capacity in the coming year.</p> <p>Be clear here that this is not a strategic planning session or general staff retreat. We are specifically focused on strategic capacity. Acknowledge that many of the categories have connections to our broader work and may bring up other important conversations. Name that you will attempt to keep focused on strategic capacity, but that we have a "parking lot" set up to capture additional conversations needed in the future.</p> <p>Community agreements: Develop agreements for how people will work together based on the practices of the organization. For example, "make space, take space" or "what's happened here stays here, what's learned here leaves here."</p>



Agenda

SECTION FOCUS & TIMING	FACILITATOR'S NOTES
<p>Initial Reaction to Survey Results 45 Minutes</p>	<p>Purpose: Shared information about how people responded to the survey and a deeper understanding of what patterns and outliers exist.</p> <p>Instructions: Handout the survey result packets and describe the activity and its purpose. People will have 15 minutes to review the results in their packets and reflect individually on what they're seeing by continuing to walk and think, drawing, or writing. Encourage people to get up and move away from the table as they reflect.</p> <p>Reflection questions:</p> <ul style="list-style-type: none"> • <i>How does what you're seeing connect to your own survey responses and experiences at the organization?</i> • <i>Are there any disconnects? What might be behind these disconnects?</i> • <i>Does anything that you're seeing surprise or excite you?</i> <p>Invite people to discuss in groups of 3-4 before sharing broad reactions with the group. Be sure to capture the reactions on a flip chart.</p>
<p>Break 15 minutes</p>	<p>Encourage people to clear their heads, move their bodies, and not just read emails.</p>
<p>Capabilities that Make Up Strategic Capacities 60 minutes</p>	<p>Purpose: this section is meant to unpack the different choices behind learning capabilities & resource adaptation and how they build strategic capacity. Divide people into groups of 3-4 different from the last exercise, no more than ten groups.</p> <p>Connection to survey: Start by inviting people to share their sense of what the survey focused on. Name that many of these areas will be familiar to people, and they'll also notice that some overlap both learning and adaptation. For example, involving people from across your organization in decision making isn't just nice to have. It's core to developing sharp and strategic plans, your ability to learn from campaigns and apply those learnings, as well as your team's willingness to shift strategies in a moment of change. We encourage you to look at these choices with a new focus on the connection to strategic capacity.</p> <p>Let's dive deeper into what each capability is and how it supports an organization in moment of challenge and change.</p> <p>Instructions: Divide the capability notecards among the groups. Groups will have 10 minutes to discuss the topic listed. <u>Reflection questions:</u></p> <ul style="list-style-type: none"> • <i>How would you define this capability in your own words?</i> • <i>How might the capability listed connect to learning or resource adaptability, and consequently, strategic capacity?</i> • <i>What are some things we learned from the survey about how our organization does (or doesn't) operate in this way?</i> <p>Presentations: Each group comes to the front of the room to present the capability/ies that they discussed and answer questions from the team.</p>
<p>Break 45 minutes</p>	<p>Share a meal together. Encourage people to clear their heads, move their bodies, and not just read emails.</p>



Agenda

SECTION FOCUS & TIMING	FACILITATOR'S NOTES
<p>Deeper Dive: Strengths, Weaknesses, Priorities 60 minutes</p>	<p>Purpose: The organization develops a deeper understanding of their own relationship to these capabilities and identifies priorities for building capacity going forward.</p> <p>Instructions: Give people 2 post-its of each color. They should have 8 total. Share that we're going to dive deeper into some priority areas for the organization to understand:</p> <ul style="list-style-type: none">• <i>Which are we doing best at?</i>• <i>Which do we struggle most with?</i>• <i>Which feels most important to build?</i>• <i>Which feels less relevant?</i> <p>Assign a post-it color to each question. Invite people to take 10 minutes to reflect and as they are ready, to vote with their stickers on how to focus their time today. For example, if they think the organization has clear democratic structures that support strategic capacity – put their appropriate post-it there. If they think that coalition building isn't a priority for the organization right now – put their appropriate post-it there.</p> <p>Identify the top vote getters in each category and ask people stand next to the flip chart they're most excited to discuss. Attempt to have somewhat distributed groups in terms of number and a range of roles at the organization.</p> <p>Share these <u>reflection questions</u> with each group and invite them to write or draw their ideas on a flip chart:</p> <ul style="list-style-type: none">• <i>Most successful:</i> Describe the ways in which the organization is successful in this area. What specific steps did you take to become so? What specific structures support it? How might you apply these to other areas?• <i>Most difficult:</i> In what ways do we struggle with this area? What are some choices we have made (or avoided making) that have led to these difficulties? What are some steps we might take to become stronger in this area?• <i>Most important:</i> What makes this a particularly important area for us to invest in? What are the costs if we don't? What are key steps we could take to begin to invest in this area?• <i>Less relevant:</i> Why does this feel less important than the other categories right now? What might be difficult for the organization if we don't focus on building it? <p>Presentations: Invite groups to share their flip charts with the full team. Protect 10 minutes at the end to debrief what themes you are observing overall.</p>
<p>Break 15 minutes</p>	<p>Encourage people to clear their heads, move their bodies, and not just read emails.</p>



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SECTION FOCUS & TIMING	FACILITATOR'S NOTES
Visioning & Priorities 60 minutes	<p>Purpose: Identify three areas to focus on in the coming year with key steps they can take.</p> <p>Instructions: Give people three post-its of any color. Offer a grounding that it is important to focus on a limited number of areas to increase their strategic capacity over the year rather than haphazardly trying to build all the capabilities. These should be at the intersection of important and challenging, although we encourage groups to pick capabilities where they have some traction rather than the most difficult. Reminding people of the themes that emerged in the last section, ask them to place their post-its on the three areas where they think the organization should focus in the coming year. Divide people into three small groups and give them 30 minutes to work together.</p> <p>Each group should identify:</p> <ul style="list-style-type: none">• Specific steps the organization can take to build this capability• A timeline these steps could happen on• Resources needed• People who should be involved• Potential roadblocks or challenges <p>Presentations: Small groups share back with the full team. They don't need to finalize the plans here but to generate overall buy-in and invite additional ideas.</p>
Closing & Next Steps 45 minutes	<p>Purpose: Consolidate the learnings and relationships built throughout the day. Identify clear next steps.</p> <p>Instructions: Invite people to take 10 minutes to review the flip charts from the day and to take note of next steps. Afterward, ask people to share the next steps they see and come to agreement with clarity on timeline and roles.</p> <p>Reflection: Ask people to regroup in their vision from this morning. Given what they've learned today, identify a personal commitment they want to make to building strategic capacity in the organization.</p> <p>Closing circle: Invite people into a closing circle where each person shares their personal commitment and an appreciation for the person to their left. Thank them for joining.</p>



Notecards



Learning Capabilities

Let's look beyond basic evaluations and data capacity and consider an organization's ability to create a culture of learning, so that they can recognize changes in the world around them, make judgments about, and, if appropriate, apply new learnings.

In other words, are you able to assess what's going on around you to identify opportunities and threats? Do you regularly evaluate existing or potential resources and tactics? Does your team have a practice of interpreting and synthesizing information as it comes to you?

Choosing to invest in the processes and practices identified on cards connected to learning capabilities can help cultivate an effective culture of learning.



Democratic Governance

Structures and practices related to strategic planning and decision making that involve people across your organization's hierarchy as well as members.

Organizations that invest in democratic governance are more likely to identify new and creative strategies.



Clear Lines of Accountability

Organizational leaders are truly accountable to the base an organization is building and the collective vision of the organization through culture and/or structures. Having structural lines of accountability mean that when push comes to shove, leaders are more likely to stay authentically accountable to their constituents. Such practices of accountability allow constituents and staff across hierarchy to challenge misguided processes, bad decisions, and misbehaviors that threaten the organization and its community. It supports strategic planning that reflects the needs of the constituency. Finally, it deepens the investment of the base.



Strategic Networks & Collaboration

Collaboration allows organizations to diversify their knowledge by absorbing that of others, which provides organizations greater flexibility to respond to changing circumstances. It also increases your ability to assess the landscape you're operating in through shared information.



A Diverse Team

Greater diversity within an organization at all levels – not just entry level positions – should increase ideas and perspectives, which should in turn increase the likelihood that effective ideas and observations emerge when paired with collective strategizing and decision making.

This is particularly important in highly disruptive moments. When problems are unprecedented, solutions are likely to emerge from people who've not traditionally held leadership positions.



Data, Analytics & Experimentation

Building data and analytics infrastructure connected to an organization's goals and strategies, combined with a culture of experimentation, allows an organization to assess their work and its usefulness while expanding their repertoire of tactics and strategies.

Resource Adaptation

An organization's ability to effectively develop and deploy resources in order to explore, learn, and adopt new tactics.

Once organizations have sensed new threats or opportunities, is it able to reconfigure your existing resources or, if needed, develop new ones in a timely fashion? This may seem obvious, yet not all organizations are equal in their ability to do this – it is a capability that must be purposefully developed.

Choosing to invest in the following areas can help support this capability.



Operational Flexibility

It's not enough to say you value flexibility. Organizations need to build it into your operations. This includes:

- Developing collective buy-in on your mission and theory of change
- Structures that support risk-taking, ranging from protected time in a work plan to a team dedicated to seizing emerging and sudden opportunities
- Co-specialization: Having shared capacities and knowledge across your organization that may seem duplicative, but support interdependency so that it's easier to reconfigure resources and teams



Organizational Culture & Collective Commitment

Organizations need to foster a belief, grounded in reality, that the organization values change and adaptability. Establishing a culture that embraces change and fosters commitment helps your team get on board more quickly than one where adaptiveness is an afterthought, or a topic broached only under duress.

In addition, strong collective commitments – rooted in commitment to each other, not just the mission – that are nurtured through a latticework of relationships across members and staff make it more likely dedicated and motivated people will soldier through difficult periods of change.



Strategic Networks & Collaboration

In addition to supporting learning, building relationships and collaborating across organizations increases adaptability by enhancing both efficiency and efficacy, ultimately producing what some call strategic agility with a broader menu of responses to choose from at a moment of change.



Survey: Understanding Your Organization's Strategic Capacity

What do we mean by “strategic capacity”? Strategic capacity is the ability of an organization or movement to adapt to changing power dynamics in ways that help it move closer to achieving its goals. Given that strategic capacity is inherently connected to shifting terrains, there's no straightforward process to building it. Instead, it's about making choices around two big areas: **the ability to learn and adapt your resources to meet the moment.**

Some things to know about strategic capacity:

- ✓ It's most important when your power is challenged. Many movements and organizations have strategic plans at the outset of their campaign. The true measure of strategic capacity emerges, however, when things do not go as planned, when they are challenged in ways they did not expect.
- ✓ It resides in your whole organization and your ability to harness the interplay of individuals coming together – not just an effective, visionary leader.
- ✓ It's about managing uncertainty. This means that strategic capacity is not, and cannot be, a boilerplate checklist of routines for organizations to follow. Rather, judgment is required to leverage an organization's strategic capacity in a way that best serves the particularities of any given situation that an organization is confronting.

While we can't give you a checklist – we can offer you a set of choices to make around learning and adaptation that can come together to increase your organization's strategic capacity.

A first step in building strategic capacity is taking an honest look at how you're doing already and identifying which areas are most important for you to focus on. This assessment is designed to do just that – inviting input from a range of staff and members and, most important, provoking conversation across your organization.

This survey should take about 30 minutes to complete. The more honest you are able to be, the more your organization will benefit from this process. This includes identifying when you don't know the answer to a question – even that is valuable information in understanding the full picture across different roles in your organization. After you and your team members have filled out this survey, you'll come together for a facilitated session to better understand what they mean for your organization.

Your organization will make a collective decision about whether or not people's responses will be anonymous. Please check to make sure you understand what your organization has decided.

Part I: The Big Picture

Can you think of a time when the organization has faced an unexpected challenge? How did you navigate this period? Please describe the situation in as much detail as you can remember in any format – writing, drawing, and diagrams are welcomed. Key points might include:

Key Points might include:

1. Did you have a plan for how to react to the shifting terrain or were you operating on the fly?

2. How did decisions get made at that moment?

3. What kind of tensions arose among the staff team? With members?

4. What was your role?

5. Did you shift strategies or stay the course?

6. How did you assess the outcome of this decision?

On a scale of 1 to 5, please rate how strongly you agree or disagree about how your team did in that moment at the following:

		Strongly Disagree ← → Strongly Agree				
a)	I had a clear understanding in advance of how we would make decisions in a moment of uncertainty.	1	2	3	4	5
b)	I felt comfortable with how decisions were made.	1	2	3	4	5
c)	Our decisions felt connected to our mission and longer-term strategies.	1	2	3	4	5
d)	Afterward, we came together to learn from the experience.	1	2	3	4	5
e)	We have applied learnings from this moment to recent campaigns.	1	2	3	4	5


Part II: Learning


Research tells us that a key component of strategic capacity is an organization's ability to constantly learn—about itself, the world around it, its constituency, and so on. Below are a set of questions that ask you to reflect on the practices and processes that can lead to an effective culture of learning.


▲ Democratic Governance	Not Accurate ←————→ Very Accurate				
In making decisions, the organization tries to engage people from across the organization.	1	2	3	4	5
When I am invited to participate in a decision-making process, I feel authentically involved.	1	2	3	4	5
People at all levels of the organization are involved in developing organizational and campaign strategy.	1	2	3	4	5
Our organization has transparent ways of making decisions about who is involved in decision-making.	1	2	3	4	5
 Accountability	Not Accurate ←————→ Very Accurate				
Leaders in our organization have clear lines of accountability to our constituents/members.	1	2	3	4	5
I am clear about to whom I am accountable in my work.	1	2	3	4	5
Our organization makes it comfortable for people at all levels to disagree and dissent.	1	2	3	4	5
Constituents/members in our organization have clear ways of holding decision makers accountable.	1	2	3	4	5
Our organization has healthy ways to challenge misbehavior in the organization.					
Organizational decision makers are more accountable to our people than to our funders.	1	2	3	4	5
Diversity	Not Accurate ←————→ Very Accurate				
Our organization's leadership reflects the community of people with whom we are seeking to build power.	1	2	3	4	5
In my opinion, our organization centers the right voices in decision-making in the organization.	1	2	3	4	5
Our organization has healthy practices for negotiating difference.	1	2	3	4	5
Our organization has healthy practices for building solidarity across difference.	1	2	3	4	5
 Data, Experimentation, and Learning	Not Accurate ←————→ Very Accurate				
Our organization does not get stuck in habits or routines.	1	2	3	4	5
Our organization has good processes for incorporating new tactics, practices, and routines into our work.	1	2	3	4	5
I am often encouraged to try new things and experiment in my work.	1	2	3	4	5
Our organization is good at tracking the data (quantitative and qualitative) we need to learn from our own practice.	1	2	3	4	5
Organizational leaders have good processes for feeding learning back to the organization so that we can adapt our practice.	1	2	3	4	5
We have clear metrics we use to assess whether or not our we are accomplishing our goals.	1	2	3	4	5

Part III: Adaptation

Research also tells us that organizations with high strategic capacity are good at managing their resources (material resources, human resources, and so on) in ways that allow them to adapt to the changing world around them. Below are a set of questions that ask you to reflect on the practices and processes that enable resource adaptability.

 Operational Flexibility	Not Accurate ←————→ Very Accurate				
Everyone in our organization knows and supports our mission.	1	2	3	4	5
We have a clear, shared theory of change in our organization.	1	2	3	4	5
Having a clear north star helps our organization adapt flexibly to changing needs in our campaigns, constituencies, or our political environment.	1	2	3	4	5
Our organization has a good balance between taking risks and maintaining stability.	1	2	3	4	5
Our organization is good at responding flexibly to urgent needs that may arise (such as through rapid response).	1	2	3	4	5
People across teams in our organization work interdependently with each other.	1	2	3	4	5
When we need to, we are able to reorganize our teams to respond to changes in the world or changing campaign needs.	1	2	3	4	5

 Organizational Culture and Commitment	Not Accurate ←————→ Very Accurate				
Our organization has a positive orientation towards change.	1	2	3	4	5
Throughout our organization, there are intersecting relationships between leadership, staff, volunteers, and members.	1	2	3	4	5
Building good relationships is core to how our organization works.	1	2	3	4	5
Our organizational processes and practices enable adaptability.	1	2	3	4	5
I am committed to other people in the organization.	1	2	3	4	5
Other people in the organization are committed to me.	1	2	3	4	5

 Strategic Networks and Collaboration	Not Accurate ←————→ Very Accurate				
Coalitions and work with allied organizations is important to us.	1	2	3	4	5
We have healthy practices for assessing which coalitions we should join.	1	2	3	4	5
We have good practices for managing conflict with strategic partners.	1	2	3	4	5
We often learn new practices from other organizations.	1	2	3	4	5
Our strategic partnerships help us learn.	1	2	3	4	5
When we work in coalition, we are good at navigating the complex relationships.	1	2	3	4	5

Thank you for filling out this survey! Next your organization will convene a session to better understand what these results say about your organization's strategic capacity.