

Developing a Model for Effective Community Organizing Training

Noel Hagins, Christine Martinez, Inga McManus,
Lola West, Nien-Tsu Nancy Chen

Acknowledgements

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Abstract

This study is based on research conducted to evaluate the effectiveness of a three-day community organizing training workshop involving 38 organizers based in Ventura and Santa Barbara counties. The training was co-sponsored by the McCune Foundation, Fund for Santa Barbara, Kaiser Permanente Foundation and Weingart Foundation. Data were collected through baseline surveys conducted with training participants and the Executive Directors of their organizations, as well as field observations by researchers from California State University Channel Islands during the training in April 2017. Descriptive statistics and t-tests were used to analyze survey results, and thematic analysis was performed on the field observation data. The analyses led to a list of recommendations for foundations interested in hosting similar events in Ventura and Santa Barbara counties and beyond in the future.

Developing a Model for Effective Community Organizing Training

Community organizing is the process of empowering residents with the necessary skills and resources to mobilize around issues of collective concern and develop solutions (Christens & Speer, 2015; Staples, 2012). In Ventura and Santa Barbara counties, there are many organizations dedicated to social justice issues. Research has demonstrated that the effectiveness of these organizations depends on several factors, such as having staff who are well versed in the principles and strategies of community organizing and collaborating with other organizations addressing common causes (Cooper & Shumate, 2012; Ellingson, Woodley, & Paik, 2012; LoaCom, 2015). However, small and less established organizations often lack the opportunities and resources to create interorganizational collaboration and provide professional training to their staff.

In order to address this challenge, the McCune Foundation, Fund for Santa Barbara, Kaiser Permanente Foundation and Weingart Foundation co-sponsored an organizing training between April 28 – 30, 2017, to help local organizers hone their skills and provide them an opportunity to connect with one another. Three trainers from a well-known national training institute were invited to implement the training. Based on discussions with the event co-sponsors, the trainers focused the three-day workshop on the following topics: leadership development, approaches to social change, campaign strategy, direct action principles, and door-knocking skills.

In order to evaluate the effectiveness of this training, baseline surveys and field observations were conducted to answer the following questions:

RQ1: What is the current organizing capacity of community organizations represented in the training?

RQ2: To what extent do these community organizations currently engage in interorganizational collaboration with other community groups?

RQ3: What are the factors that enhance the effectiveness of the training workshop?

RQ4: What are the factors that lessen the effectiveness of the training workshop?

Baseline Surveys

Methods

Participants & procedure. In order to obtain a fuller understanding of the organizing capacity of the community groups that attended the training, both the Executive Director (ED) of these groups and the training attendees – mostly grassroots organizers – were invited to participate in the baseline surveys. In doing so, any discrepancy in the perceptions of the EDs and those of the organizers could be identified. A pen-and-pencil survey was fielded with the attendees on the first day of training (i.e. April 28, 2017) to gauge their assessments of organizational capacity. Out of the 38 attendees representing 24 organizations, 22 completed this questionnaire.

Furthermore, in the month prior to the training, the ED or a management staff member from groups that had been selected for the training were invited to complete a similar questionnaire online using Qualtrics. A total of 24 management staff completed the questionnaire on behalf of their organization.

Measures. The questionnaire distributed to the training attendees included the following measures:

- 1) General information about respondent
- 2) General information about respondent's organization

- 3) Respondent's overall level of confidence in rating their organization's capacity (1 = not confident at all; 10 = extremely confident)
- 4) Respondent's assessment of their organization's capacity: Items were adapted from the Marguerite Casey Foundation Organizational Assessment Tool (Marguerite Casey Foundation, 2017) to measure a group's capacity in the following areas on a 4-point scale (1 = elementary level; 4 = advanced level):
 - a) Ability to motivate and mobilize community members
 - b) Ability to influence policy-making
 - c) Ability to involve community members
 - d) Ability to organize
 - e) Ability to form and leverage partnerships
 - f) Ability to build base
 - g) Ability to have community presence and standing

In addition to the abovementioned questions, the online questionnaire distributed to the EDs included more detailed questions about each organization (e.g. annual budget, number of full-time and part-time staff as well as organizers and volunteers). Furthermore, the EDs were asked about their current interorganizational communication and collaboration patterns. These items would serve as a baseline for measuring the impact of the training on creating new interorganizational partnerships.

Both surveys – for training attendees and for EDs, respectively – were available in English and Spanish so respondents could answer in their preferred language.

Analysis. In addition to descriptive statistics, t-tests were performed to see if training attendees and management staff differed on their overall level of confidence in rating their organization's capacity, as well as on their assessment of each of the seven capacity elements.

Results

On a scale of 1 to 10, 1 being "not confident at all," and 10 being "extremely confident," training participants scored significantly lower on their overall confidence to rate their organization's capacity ($M = 3.33$, $SD = 1.06$) compared to the EDs ($M = 8.17$, $SD = 1.56$). However, training participants' rating of their organization on each of the seven capacity elements actually did not vary significantly from the ED's assessment, suggesting that organizers and management staff tended to concur on their evaluations.

To address RQ1 about participating groups' current organizing capacity, descriptive statistics indicated that across the seven capacity elements, survey respondents on average scored the highest on capacity in forming and leveraging partnerships and the lowest on capacity in influencing policy-making and in building base (see Figure 1).

To address RQ2 regarding interorganizational collaboration, 20 out of the 24 groups had worked with at least one other organization during the past year. The average number of organizational collaborators for the past year was 3.21 ($SD = 2.93$). See Figure 2 for a detailed tally.

Figure 1. Mean score on each organizational capacity element (1 = primary level; 4 = advanced level of capacity)

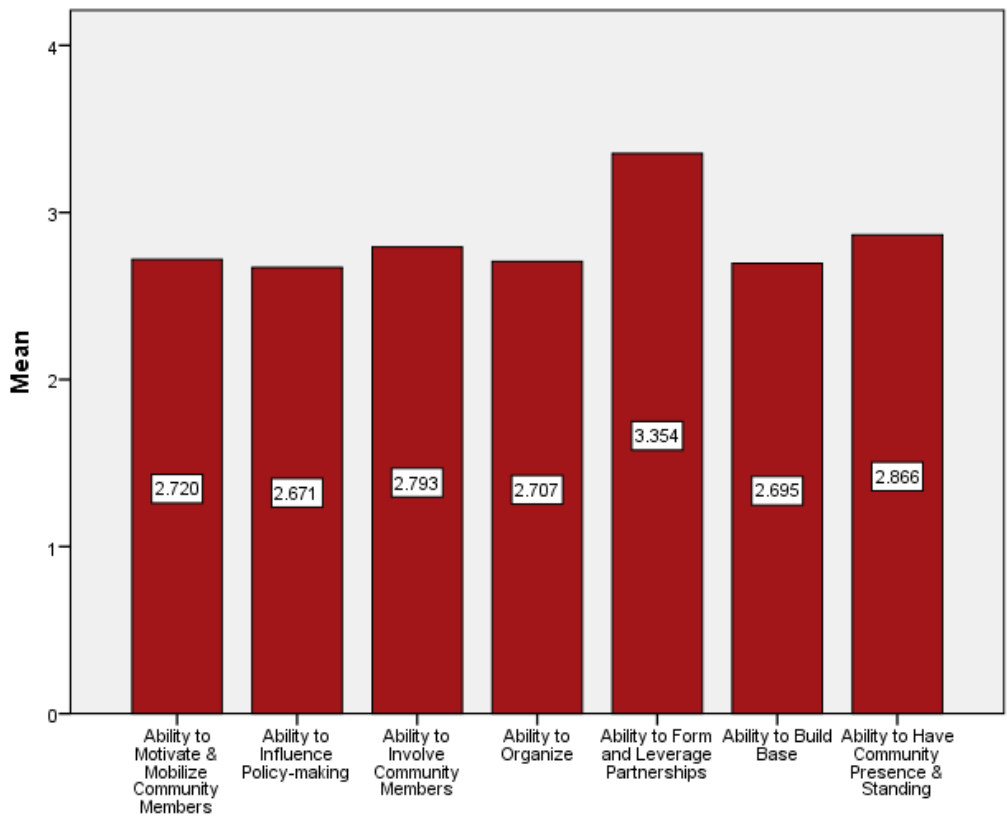
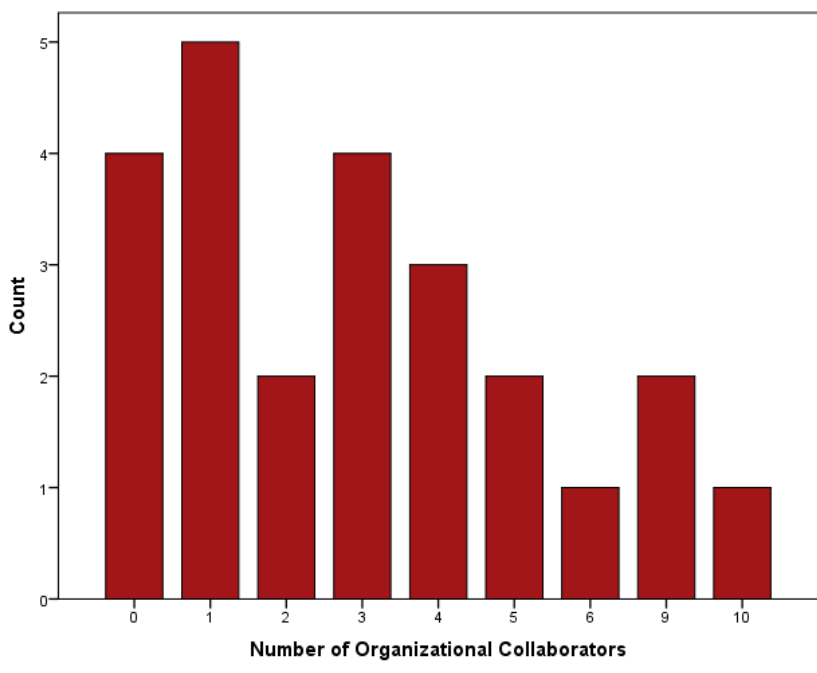


Figure 2. Number of organizational collaborators last year



Discussion

Survey findings indicate that grassroots organizers and EDs from community groups represented in the training are on the same page regarding their assessments of their group's organizing capacity. Among the seven capacity elements, participating community groups are least confident in their ability to influence policy-making and to build base. It is therefore important for community organizing training designed for organizers in our region to focus on these two capacity elements in its curriculum.

Survey results also reveal that many local groups already engage in interorganizational collaboration, but there is still room for improvement. Four of the 24 participating organizations currently do not partner with any other group at all, and five organizations collaborated with one group only during the past year. Community organizing training can play a role in facilitating interorganizational partnership by bringing together staff from different groups under one roof and creating opportunities for participants to connect with one another through group discussions and activities.

Field Observations

Methods

A total of five researchers took turns to observe the training over the three-day period, with at least two researchers present at any time of the training so their findings could be triangulated. Based on prior discussions, the researchers focused their attention on documenting factors that facilitate or lessen the effectiveness of the workshop. Each researcher took comprehensive field notes, and one researcher analyzed all field notes at the end using inductive content analysis to identify recurring themes.

Results

Space and proxemics. A larger venue was used for the training on the first day, and the workshop moved to a smaller venue for the second and third days. With the smaller venue, it was almost as though participants had to become engaged because they could not distance themselves from the training. In addition to the main room, the second venue had a few smaller rooms inside and several communal tables outside, where participants could work on their group activities. When an activity was assigned and groups were sent to different rooms, groups that worked in the smaller rooms had an easier time collaborating, communicating and getting started. The more intimate space and seating arrangement in these small rooms seemed more conducive to team collaboration and participation. On the other hand, when a group was assigned to stay in the main large room, things did not get rolling as fast. Communication lagged a little more. The large space and more dispersed seating within it did not seem as conducive as the small rooms.

In other words, the size of the venue and seating arrangement could either facilitate (RQ3) or hinder (RQ4) communication and collaboration during the training. A smaller venue tended to facilitate more frequent and intimate interaction compared to a larger one. However, seating arrangement might help alleviate the communication challenges associated with a larger venue. For example, on the first day, the trainers asked everyone to sit around a double-sided table with chairs in a block “U” shape so that all participants could see one another. The layout of this seating model seemed to enhance the flow of conversation and invite participation among most participants.

Language and interpretation. The training involved participants who were either bilingual in English and Spanish or monolingual in one of the languages. Among the three trainers, one was bilingual, and the other two were monolingual in English. To facilitate understanding and participation, simultaneous interpretation in Spanish and English was offered

throughout the three-day workshop. Monolingual participants and trainers listened to the interpreter through headsets so they could understand each other.

The training was, for the most part, conducted in English. However, the bilingual trainer facilitated a session entirely in Spanish on the second day. When this occurred, the monolingual Spanish speakers participated much more than they had previously. As for everyone else, the Spanish speaking facilitator seemed to have no negative effect on their participation. This was probably because at least a half of the individuals seemed to be bilingual. Even the monolingual English speakers seemed comfortable engaging when the training was in Spanish.

These observations suggested that even with the availability of simultaneous interpretation, monolingual Spanish speakers might still be hesitant to engage in Q&A during the training. However, the engagement gap narrowed when a trainer facilitated a session in Spanish, suggesting this as a promising strategy for enhancing the effectiveness of the training for all regardless of their backgrounds (RQ3). Small group activities and pair discussions were also effective strategies to encourage participation from monolingual Spanish speakers, as such setups seemed to make people feel more comfortable, and English speakers would not outweigh Spanish speakers as much as they would during larger group activities.

Time and scheduling. In order to deliver as much content as possible, the training lasted for 8-9 hours each day. It was evident that toward the end of the day, many participants started to get tired and seemed less able to concentrate. In other words, the length of the workshop was potentially detrimental to learning (RQ4). Furthermore, not all attendees were able to participate in all three days of training. Since the training components were often cumulative, individuals who missed part of the workshop had difficulty grasping lecture content and participating in group activities later on (RQ4).

New concepts and terminology. The trainers introduced many new concepts during the three-day workshop, such as “issue,” “strategy,” “tactic” and “power.” These terms have specific definitions in the context of community organizing that differ from their everyday usage, and this was a source of confusion for some participants (RQ4). Even for those who attended all three days of workshop, some still misunderstood these terms’ meaning and application by the end of the training.

Discussion

Based on findings from the field observations, a number of recommendations can be generated for foundations interested in sponsoring similar organizing training in the future. First, the training venue should ideally contain several smaller rooms with a communal seating arrangement to encourage collaboration during group activities. When needing to use a large room, a U shape or circular seating arrangement is more conducive to conversation and collaboration than more dispersed seating.

Second, for similar workshops that involve linguistically diverse participants, it is important to provide simultaneous interpretation to facilitate understanding and engagement. Furthermore, it is beneficial to have bilingual or multilingual trainers facilitate sessions of the training in different languages to encourage participation from those with limited English proficiency. These sessions would preferably take place earlier on during the training schedule (e.g., during the first few hours of a 3-day training) so the participation gap can be reduced as soon as possible.

Third, training days that last for 8-9 hours could be too long for some community organizers. A 6-7 hour day might work better with the participants’ energy levels, but the downside would be the need to cut back on some instruction or activities. In addition, given that

training components are likely to build off one other, it is crucial for all participants to attend the entire training. As noted in the field observations, missing part of the training would create challenges for participants to fully engage with the training material and with their trainers and peers later on. It is therefore important for coordinators of similar workshops in the future to identify an optimal time and schedule for their participants and to communicate with them the importance of full attendance.

Last but not least, many concepts and terms used by the trainers may be foreign to on-the-ground organizers, especially those are relatively new to this line of work. Given the likelihood that they will be exposed to these ideas for the first time during similar workshops in the future, trainers should ensure that attendees fully understand the meaning and application of these terms in the community organizing context. This can be achieved by constantly reminding participants of the definitions of these terms and helping them connect these concepts with real-life examples and their everyday work.

Conclusion

Using mixed-methods research, this study evaluates a community organizing training involving 38 organizers based in Ventura and Santa Barbara counties. Baseline surveys and field observations shed light on how space, proxemics, language, interpretation, time and scheduling can work to either facilitate or hinder the effectiveness of similar workshops in the future. They also reveal some most pressing topics to be covered by such training and how specialized concepts can be effectively taught to training participants, especially those new to the scene of community organizing. Recommendations from this study are expected to contribute to developing a model for planning and implementing effective community organizing training in our region and beyond.

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