

Quick Strategic Action Assessment & Facilitator Guide

Part A: Quick Assessment Tool (15-20 minutes)

For workshop participants to rapidly evaluate action readiness

Your Strategic Action: _____

Quick Readiness Check

Rate each area 1-5 (1=major gap, 5=fully ready)

Vision & Values

- This action advances justice and sustainability goals: ____/5
- I understand how this connects to larger movements: ____/5 **Subtotal:** ____/10

Systems Thinking

- I understand how this action affects multiple domains (ecology, economics, politics, culture): ____/5
- I can anticipate potential unintended consequences: ____/5 **Subtotal:** ____/10

Personal Readiness

- This fits my current life situation and capacity: ____/5
- I have the key skills needed or know how to get them: ____/5 **Subtotal:** ____/10

Community Support

- I know who my key allies and stakeholders are: ____/5
- My community is ready for this kind of change: ____/5 **Subtotal:** ____/10

Resources & Infrastructure

- I have access to the essential resources needed: ____/5
- The basic infrastructure exists to support this action: ____/5 **Subtotal:** ____/10

TOTAL QUICK SCORE: ____/50

Immediate Action Plan

Green Light (40+ points): Ready to proceed with detailed planning **Yellow Light (30-39 points):**

Address 2-3 key gaps before proceeding

Red Light (Under 30 points): Significant preparation needed or consider different action

My top 3 development priorities:

1. _____
2. _____
3. _____

Support I need from workshop community:

Part B: Facilitator Guide

Pre-Workshop Preparation

Materials Needed:

- Quick Assessment sheets (one per participant)
- Sticky notes in 5 colors (red, orange, yellow, light green, dark green)
- Large wall charts for each assessment domain
- Markers and pens
- Timer

Room Setup:

- Tables for small groups (4-6 people)
- Wall space for 5 large assessment domain charts
- Open area for movement activities

Workshop Flow (90-120 minutes total)

Opening (10 minutes)

Purpose Statement: *"Today we're moving from inspiration to implementation. This assessment helps ensure your chosen actions succeed."*

Key Message: *"This isn't about discouraging action - it's about setting yourself up for success and identifying where our community can support each other."*

Individual Assessment (15 minutes)

Instructions:

1. "Take 15 minutes to complete your quick assessment honestly"
2. "Focus on your gut instinct - don't overthink"
3. "Remember: gaps aren't failures, they're development opportunities"

Facilitator moves through room: Available for clarification, not coaching answers

Color-Coding Activity (10 minutes)

Instructions:

1. "Take sticky notes matching your scores:"
 - Red (1): Major gap
 - Orange (2): Significant challenge
 - Yellow (3): Some concern
 - Light green (4): Mostly ready
 - Dark green (5): Fully ready
2. "Place one colored dot for each domain on your assessment sheet"

Community Mapping (20 minutes)

Round 1: Domain Strengths (10 minutes)

- Post 5 charts around room (one per assessment domain)
- Participants place GREEN dots on domains where they scored 4-5
- Creates visual map of community strengths

Round 2: Support Needs (10 minutes)

- Participants place RED/ORANGE dots on domains where they scored 1-2
- Creates visual map of community development needs

Facilitator narrates patterns: *"I see lots of green in Personal Readiness... and red clustering in Resource Assessment. What does this tell us?"*

Peer Consultation Rounds (30 minutes)

Round 1: Strength Sharing (15 minutes)

- Form pairs: one person strong in domain A, one needing support in domain A

- 7 minutes each direction for advice/resource sharing
- Ring bell, switch roles

Round 2: Gap Troubleshooting (15 minutes)

- Form new pairs based on similar challenges
- Brainstorm solutions and mutual support strategies
- Focus on: "What would it take to move from red to yellow in this area?"

Action Planning Carousel (25 minutes)

Station Setup: 5 stations around room, one per assessment domain

Station Activities (5 minutes each):

Station 1: Vision Alignment

- Poster: "How does your action connect to bigger movements?"
- Participants write connection points on sticky notes

Station 2: Systems Impact

- Poster: "What ripple effects might your action create?"
- Participants map potential impacts across domains

Station 3: Personal Readiness

- Poster: "What support do you need to sustain this action?"
- Participants identify specific capacity-building needs

Station 4: Community Support

- Poster: "Who are your key allies? Who might resist?"
- Participants map stakeholder engagement strategies

Station 5: Resources & Infrastructure

- Poster: "What's your minimum viable resource list?"
- Participants identify essential vs. nice-to-have resources

Community Commitment Ceremony (15 minutes)

Traffic Light Sorting:

- Green corner: "Ready to proceed" (40+ points)
- Yellow corner: "Preparing to proceed" (30-39 points)
- Red corner: "Building capacity" (under 30 points)

In each corner:

- Share one specific next step you'll take
- Offer one specific support to someone else
- Receive community witnessing/encouragement

Closing Circle (10 minutes)

Reflection Questions:

- What surprised you about your assessment?
- What support are you most excited to offer others?
- How has this changed your approach to your chosen action?

Facilitator Tips & Troubleshooting

Managing Emotional Responses

If someone gets discouraged by low scores:

- "Low scores aren't judgment - they're information"
- "Every successful activist started with gaps"
- "The assessment shows you what to learn, not whether to act"

If someone dismisses the assessment:

- "What would it look like to honor both urgency and strategy?"
- "How might rushing into action actually slow down change?"
- Redirect to peer learning rather than defending tool

Encouraging Honest Self-Assessment

Model vulnerability: Share your own gaps in past actions **Normalize struggle:** "If this was easy, it would already be done" **Focus on learning:** "The goal is wisdom, not perfect scores"

Adapting for Different Group Dynamics

Highly motivated group: Emphasize strategic thinking over enthusiasm **Discouraged group:** Focus on community support and small wins **Mixed experience:** Pair experienced activists with newcomers **Large group (20+):** Use breakout rooms, extend timing by 15-30 minutes

Post-Workshop Follow-Up

Immediate (within 1 week):

- **Send summary:** Community strengths/needs map from sticky note activity
- **Create matches:** Connect people who can support each other's gaps
- **Share resources:** Compile specific resources mentioned during workshop

Short-term (within 1 month):

- **Check-in calls:** Individual 15-minute calls with participants
- **Skill-sharing sessions:** Workshops targeting common gap areas
- **Action launches:** Support green-light participants with startup help

Long-term (3-6 months):

- **Success tracking:** Follow up on implementation progress
- **Assessment refinement:** Adjust tool based on what predicted success
- **Community learning:** Share stories of how assessment helped/hindered

Variations for Different Contexts

Virtual Workshop Adaptation:

- Use breakout rooms for peer consultation
- Create shared digital whiteboards for community mapping
- Send assessment form in advance, focus workshop time on peer support

Shortened Version (60 minutes):

- Skip carousel stations, extend peer consultation to 20 minutes
- Combine community mapping with commitment ceremony
- Focus on top 2 development priorities instead of 3

Advanced Group Variation:

- Add stakeholder mapping exercise

- Include systems diagramming activity
- Use full assessment tool as homework with workshop for peer review

Key Success Indicators

During Workshop:

- Participants honestly assess rather than inflate scores
- People actively offer support to others
- Energy shifts from individual excitement to collective strategy

Post-Workshop:

- Participants follow through on identified next steps
- Community connections formed during workshop continue
- Actions launched with assessment guidance show higher success rates

Common Pitfalls to Avoid

Over-emphasizing assessment: Balance evaluation with encouragement **Perfectionism paralysis:** Emphasize "good enough" over perfect readiness **Individual focus:** Keep returning to community support theme **Generic advice:** Encourage specific, actionable commitments **Rushed timing:** Better to skip activities than rush through them

Materials Checklist

Print before workshop:

- ☐ Quick Assessment sheets (# of participants + 3 extras)
- ☐ 5 large assessment domain posters
- ☐ Facilitator script/timing guide
- ☐ Sign-up sheets for post-workshop support matching

Gather materials:

- ☐ Sticky notes (5 colors, 3 pads each color)
- ☐ Markers (thick tip, multiple colors)
- ☐ Pens for participants
- ☐ Timer or phone with alarm
- ☐ Masking tape for posting charts
- ☐ Name tags and markers

Optional enhancements:

- ☐ Bell or chime for transitions
- ☐ Flip chart paper for additional notes
- ☐ Camera to document community maps (with permission)
- ☐ Sign-up sheet for follow-up activities

Remember: The tool serves the participants, not the other way around. Stay flexible and responsive to your group's energy and needs.