A CONGREGATIONAL ORGANIZER'S PRIMER

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The organizer's initial goal in congregational or faith-based community organizing is to develop a relationship with the senior clergy-person, to uncover his or her deepest interests and values. This process goes on over a period of months, sometimes as long as a year or two. It involves a series of hour-long, one-to-one visits with the pastor, priest, rabbi, or imam.

The organizer's character, competence, commitment, and confidence are critical variables in the outcome of these relationship-building efforts. It's essential that, at the outset, the organizer resist talking about the mechanics of the organizing process. Clergy not uncommonly press for details about how the organizing works, wanting immediately to "get down to business." Instead, it's important that the organizer's self-perception as a colleague be clear and confident, that the early conversations focus on mutual sharing of personal and professional biography and current values and interests.

For reasons that should become clear momentarily, any variation on a "sales" approach will be self-defeating for the organizer. Another major pitfall is over-confidence, imagining one knows more about the clergy, congregation, or community than is actually the case. As Jose Carrasco says, "go in smart, come out stupid; go in stupid, come out smart."

In a first visit, the organizer's agenda begins with a credential. The credential includes a brief statement, certainly not more than a minute or two. The credential should specify who referred the organizer, and recognizable names of members of the sponsor committee (e.g., movement leaders and luminaries). It should include the broad purpose(s) of the organization (indicating in a very general way its methodology), the size of its membership (or numbers "represented"), and a statement of the visit's purpose.

Over a number of visits, ranging from as few as two to as many as 12 or 15 hours, the organizer's objective is to increase the clergy-person's investment in their relationship. This is achieved by eliciting information about the leadership style of the clergy-member, the congregation and its problems, rabbinate or ministry for developing the institution and its members, plus the character of the community and the challenges it presents. Ideally, a detailed explanation of the organizing process, and a proposal to begin one-to-one visits with the congregational staff or key leaders, doesn't happen before the third or fourth visit with the clergy-person.

By all reasonable means the organizer must delay detailed discussion of the organizing process. This is possible by posing incisive and challenging questions to the clergy-person. Clergy have a stake in answering such questions because, by doing so, there is direct stimulation and insight into areas of practice that are confused or are constraining personal or institutional self-interest.

Conversation Content

After sharing personal biography, I usually begin asking questions about the congregation—its history, activities, key leaders, etc. This tends to be an "easy" conversation, frequently one that is comfortable for the clergy, allowing storytelling and illustrations of personal and institutional struggle and achievement. If all goes well, information about the congregation and personal biography dominate most of a first visit.

On a second visit my agenda is to talk about the surrounding community and how the congregation relates to it, both as individuals and families and through their religious institution. This conversation is ordinarily more difficult for the clergy, commonly moving us into areas that recall unproductive programs—but building trust between the organizer and clergy-person.

A third visit typically begins uncovering the clergy-person's rabbinate or ministry in three critical areas:

1. *Personal rabbinate or ministry* is how the clergy-person is using the gift of life—vision, goals, methods, etc.

   Questions and talk in this area usually touch on life goals, getting a call to the ministry, or, for an older pastor, hoped-for legacy of a life's work.

2. *Institutional rabbinate or ministry* is broadly related to developing the institution and its congregation. This too involves vision, goals, and methods—but now in relation to increasing the membership, erecting a new school building, modifying the liturgy, even bringing faith to life in action-programs.

   Here my questions to the clergy are often about whether the institution and its members have been able to integrate their "internal" and "external" lives. That is, whether the huge amounts of energy and other resources (e.g., money and time) that members normally invest in the external, mundane world, often running amok morally, are being turned back to vitalize the internal life of the congregation. Or, on the other hand, whether the internal dimensions of the congregation—worship, liturgy, ritual, the-

ology, fellowship, etc.—are directly and actively guiding life in the mundane world, or simply remaining the piety of a religious social club.

3. The third area of conversational exploration is the clergy-person's *human development rabbinate or ministry*, that is, what the clergy-person does to develop individual human beings, to feed their growth in faith, knowledge, skill, capacity for relationship and risk-taking, and modeling the integration of internal and external worlds.

   Often my approach to this part of rabbinate or ministry is to ask if the clergy-person keeps a list—it may be on paper or simply a mental list—of people identified for leadership development. About three-quarters of the clergy I've asked say they have no such list. For those who have a list, I ask if they have a defined set of experiences they want those people to have over some period of time as the main means of their leadership development. About three-quarters of the clergy say they do not. Of those who do, when asked what those experiences are, without exception they answer with a list of formal jobs and tasks related to managing and operating the institution. I then ask if the clergy-person does anything to develop leaders who model for others in the congregation practical ways to bring the internal life of the congregation to bear in the external world, in a way that effectively relieves conditions that are destroying individuals, families, and whole communities. Typically the answer is "no." My final questions in this vein to the clergy: "If your leadership development produces people who will run the institution, will they also model bringing faith to life in worldly action?" To this, too, they typically answer "no." Then I ask my final question: "If your leadership development produces people who model bringing faith to life in worldly action, will they also run the institution?" This typically leaves them nodding affirmatively and reflecting on their leadership development perspective.

With the relationship deepened by two or three meetings that have covered the essentials, I begin exploring explicitly the clergy-person's own leadership style and how it is related to previous statements of personal and institutional self-interest.

Organizing Process

Invariably, an early clergy response to conversation about the organizing process is to bring out the "gunny sack" of objections. The sooner this happens, the better. These objections encompass a remarkable range. They include: "it won't work here," whether *here* is a rural area, suburbia, or particular religious denomination; "we're broke and can't pay for your services"; "our congregation is split on social action and would never agree to this type of activity"; "we only have a half-dozen real leaders now and this would divert them from critical responsibilities in the congregation"; "as a recognized and respected pastor, I have relationships with decision-makers, successfully influence their policies and practices, and wouldn't want to jeopardize those relationships with confrontation tactics"; "we're already empowering people with our evangelism campaign, food pantry, and homeless shelter"; and so on.

What is the most productive response to such objections? Avoiding them is a serious, probably fatal mistake. Attempting to answer them directly, at the time they're raised, is likely to have three important negative consequences. First, it will arouse the resentment of the clergy-person against an outsider who presumes to have glib answers to intractable problems. Second, it will mark the end of the organizer's learning about the situation of the clergy-person and the institution. Third, it will—*ipso facto*—undermine the building of a relationship between the clergy-person and organizer.

The alternative is to "get one's nose on the ground" in response to these objections, that is, to begin asking detailed questions about each objection—and then to listen with empathy to the answers. The consequences of this approach are that the organizer becomes not a target for resentment but a supportive colleague, the organizer learns a great deal more about the clergy-person, the congregation, and the community, and the relationship between organizer and clergy-person is deepened.

It's at this point, ideally, that the organizer begins to describe the organizing process, not as a "canned" program but by direct linkages to the personal and institutional challenges faced by the clergy-person. For example, if the clergy-person has described building up congregational membership as a major problem and institutional self-interest, the organizer may begin with questions that offer an opportunity to explore the usefulness of a congregational community organizing strategy to accomplish that objective.

Consider such questions: Has the congregation offered its members an opportunity to come together in substantial numbers to talk about the day-to-day pressures they face in the larger community, pressures that are undermining them and their families? Do they receive practical guidance on how they could put their faith into action in a way that would effectively improve the community? Has the congregation clearly communicated to its members its denominational and congregational values and vision for bringing its internal life into the world in a way that fundamentally alters the quality of life for people? If these things are not part of the life of the congregation, is it reasonable to expect that modern people—given the extraordinary pressures

and challenges they face—will find the congregation sufficiently relevant to make it a real priority in their lives?

Initial One-to-Ones

Once the organizer has described the organizing process in the context of the clergy-person's personal and institutional self-interest, it is much more likely that the clergy-person will want the organizer to talk with other congregational staff and key leaders.

It's essential that the organizer do these initial one-to-one visits before convening any meetings or workshops. These contacts and reports back to the clergy-person about individual statements of concerns and willingness to attend training workshops are critical to the clergy-person's decision to move ahead. The decision may be by independent action (as is common with Catholic priests) or by lining up a vote of the lay leadership body (in a Jewish congregation or Protestant church).

The organizer directly and explicitly propositions the clergy-person. The language formula is more or less standardized. "Does this process interest you sufficiently for me to visit a dozen of your key people, get acquainted with them, find out their concerns about what's happening in the larger community, and in the life of the congregation if you like, and invite them to a workshop?"

The organizer makes it clear that the next step following the one-to-one visits is a report back to the clergy-person on their content, that the decision to move ahead is incremental. At each step the clergy-person and organizer evaluate problems and prospects of the process for the congregation, and both have the option of deciding to delay or entirely derail the process. The organizer explains that the decision to introduce organizing into the congregation isn't final until the end of the third workshop. It's then that those who participated in the workshops will formally decide to constitute themselves as a "congregational community organizing committee" or "parish organizing committee."

Presumably, before that third workshop, if necessary, the appropriate formal decision-making body within the congregation has given a mandate to proceed with the process.

Assuming that the initial one-to-ones go well, the organizer will then obtain from the congregational staff an extensive list and begin doing 35 to 100 or more personal visits, depending on the size of the congregation. This list should represent a cross-section of the congregation; it should not be targeted to "activists."

In general, the organizer needs twice the number of names than will actually be seen. In my experience, a relatively high percentage of those visited will agree to attend workshops—but of those who commit to come, only about half turn out.

In order to get 15 to 20 appointments set up each week in a one-to-one drive, I set aside late Sunday afternoon and early Sunday evening to make a large number of phone calls. The essentials of these calls include a credential by the clergy-person, reference to the organizing project and the involvement of other congregations, and a request for a half-hour of time to "talk about problems in the community."

The one-to-one itself, as already noted, has an infrastructure of essential elements. At the outset, the credential is repeated. The organizer then gives an overview of the sponsor committee and its perspective. To wit: the sponsors are a group of religious and community leaders who want to do something about forces undermining family life and who see a need for large numbers of people, guided by their faith, to work together on these problems through practical action in the world. At this point I ask, does such a vision make sense for you in this congregation? If I get a negative response to this question, I stop and clarify it. If the answer is firm, I begin closing the visit. If not firm, I begin working to turn it around.

If the answer is positive, the next step is to begin building a relationship by learning more about the individual. The opener may be a statement such as, "Tell me about yourself," or a question such as, "When did your family join the congregation?" This talk should be directed to avoid discussion about solution strategies, focusing instead on specific stories and anecdotes that illustrate personal and family history, and related pressures and hopes.

The organizer, referring back to the sponsor committee's viewpoint, explains that forces in the community are undermining the health of individuals, families, and institutions. Although people of faith are our best hope, we don't see affected faith communities taking action on these problems. Our analysis is that ordinary people in congregations and parishes aren't doing anything about these destructive forces because there's something missing in their relationships: there's a nearly complete absence of talk about deepest pressures and hopes. Because so many people have learned not to think about their pressures and hopes—whether from powerlessness, fear, upbringing, or some other influence—they also fail to talk and act on them.

The conclusion is that people need to develop deeper relationships in which they share pressures and hopes, and through which they learn to work together effectively to change the conditions that are destroying their lives. We have an approach to this problem of deepening and strengthening relationships and building effective organization. The approach begins with three workshops. At this point I give a brief description of the three workshops, with illustrative stories of action on issues.

When doing one-to-one, clergy-referred visits, after describing the three workshops I briefly communicate a picture of coming organization and ac-

tion by sharing stories about other successful organizations, their issues and campaigns. Whenever possible, I attempt to link the individual's problems (e.g., alcoholism) to larger social forces (e.g., unemployment) in the community, and I raise the possibility of dealing with those forces through organized action. It's important that action stories are related in a way that fits the values and commonsense of the individual, so that action is not defined in the person's mind as craziness, mindless conflict, disruption, violence, etc.

The individual is then invited to attend a first workshop with the question, "Does this make sense to you?" If the answer is "yes," the follow-up question is, "Will you come to a first workshop."

Halfway into the one-to-one visits the organizer reports back to the clergy-person on the concerns being raised and the percentage of individuals who have indicated an interest or commitment to attend the first workshop. This information is ordinarily a powerful lever to convince clergy to go ahead with scheduling the workshops. It typically represents a new and significantly deeper level of one-to-one contact and sharing within the congregation.

Workshops

The clergy have important roles in the first and third workshops. In the first session, the clergy-person offers the opening blessing, speaks to the role of the congregation and personal faith in building community, and gives a sermon or reflection. In the third workshop, the clergy-person's role includes relating the material that has been covered in the three sessions to the values and vision of the congregation, and asking whether participants want to form a group that will be the leading edge of moving their faith community into action. The clergy-person raises for discussion and decision-making a range of one-to-one visits (for example, 100 to 200) to be accomplished by the group over a set period of time (for instance, two to three months). The clergy-person offers a commitment ritual at the next worship service(s), a liturgical rite that deepens the faith-in-action commitment of the individual and raises the congregation's consciousness about the organizing process.

The first workshop begins by focusing on the "real world," that is, the down side of daily life, with all its problems and demands. It then moves into the "ideal world," that is, the world that we want our children and grandchildren to inherit. Lastly, it concentrates on the generic characteristics of healthy relationships, whether between spouses, neighbors, parents and children, friends, co-workers, etc.—and how those relationships form a bridge between the real and ideal worlds.

The second workshop is preceded by a one-hour make-up session, allowing those who missed the first session to get up to speed before attending the second session.

The second workshop establishes the connection between family problems and community problems, a link that people often have pushed from consciousness to avoid feelings of futility and frustration that typically accompany powerlessness.

Three analytical questions are used to make the connection: How do you practically accommodate the problem? (For example: To accommodate the problem of a drug dealer on the neighborhood street, a parent in the workshop says that she no longer allows her children to play outside after school.) What kinds of pressures arise within the family from the particular kind of accommodation? (The same parent says that she has five children in a small, three-bedroom apartment, with constant yelling, roughhousing, and breakage.) And what's going wrong in relationships between family members or with individuals because of the pressures? (To this question, the parent answers that lately she's been yelling and hitting her children.)

There's usually enough time in the second workshop to analyze three or four such problems. If the problem is real, not simply a newspaper or TV news headline, the analytical process always produces a similar result. Through their own sharing, participants in the workshop are able to see—often for the first time—the direct connection between what's happening in the larger community and what's going wrong in their families. The participants begin to see that they have been unconsciously isolating themselves from social forces, thinking implicitly that they, acting alone as individuals, had to handle such forces.

In response to the question, "To whom do your turn for help with these concerns and problems?" from a quarter to a third of those present answer, "the church." When asked what that means, the answer is "the staff." With some of the clergy present, the organizer asks them, "How do you respond to all these family and community problems?" They describe their feelings of being overwhelmed, implicitly suggesting the limits of the professionally dominated service approach.

This leads to the idea that the congregation "has to be all of us, not just the clergy and staff providing things for members." The question then raised is, "Do you think it's important that many people in the congregation begin to initiate and deepen relationships by sharing their deepest concerns and hopes, and that they learn to act together effectively on those concerns."

The third workshop is also preceded by a one-hour make-up session. The focus of the workshop itself is practical training on doing one-to-one visits. The emphases are on building a relationship, asking a couple of key questions, listening carefully and non-judgmentally, and selectively inviting participation in the organizing process.

At the end of the third workshop, with the active leadership of the clergy, participants are asked

to vote to form a congregation, church or parish organizing committee. They are asked individually and as a working team to make commitments to do one-to-one visits with a substantial number of the members of their congregation or parish. They set a time, date, and place for the first meeting of the newly formed organizing committee. Subsequently a planning meeting is arranged to set the agenda and make turnout arrangements for the meeting of the organizing committee.

At the end of every workshop (and every subsequent meeting and action of the organization), the organizer conducts a brief evaluation session. Those who remain for these five- to fifteen-minute discussions are recruited informally by the organizer or are self-selected. They often become the nucleus of the leadership planning committee that is organized before the first regular meeting of the organizing committee.

Organizing Committee

Following completion of the workshops, the organizer may have a major role in the first planning meeting, which should involve eight to 12 people. The meeting begins with a request that those present report informally on their progress in making one-to-one visits. The organizer proposes the basic two-part agenda for the upcoming organizing committee meeting: (1) an accountability round-robin, with each member making a brief (one minute) report on their one-to-ones; and (2) an organizer-led, mini-workshop, based on problems revealed during the accountability portion of the meeting, to fine-tune visiting techniques.

My practice in these mini-workshop sessions has been to model a one-to-one visit and then divide the group into triads, with someone who has never before done a one-to-one interviewing someone who has. The third person acts as an observer who, during the discussion that follows, comments on what worked and what didn't. It's important to emphasize that these one-to-ones, although done for practice, nonetheless should be taken as an opportunity to begin real relationships.

The planning meeting then moves on to the business of turnout. The concentration is on both *how* and *who*. That is, when making calls, *how* people will explain themselves and what's happening with the organization, *how* they will extend an invitation to participate, *who* will be responsible for calling particular people, and *who* will be responsible for calling the callers to ensure that they've made their calls.

Moving To Action

At the outset, especially during the period of intense one-to-one activity, during the first three or four months in the life of the new organization, meetings of the organizing committee are held every three to four weeks. As the number of one-to-ones grows and accountability reports begin to pile up, areas of concern emerge and there is an increasing consciousness and confidence among members of the organizing committee about the range of specific pressures faced by the members of the congregation or parish.

In organizing committee meetings, members begin to get a clearer sense of specific conditions and problems that underpin broader concerns, and they begin to learn the essential criteria for deciding to take action on a problem. Before long they decide to test one or two problems for their issue potential by moving into action research, which is the forerunner of direct action.

The organizer develops the research process by initially asking, "Who are the decision-makers who are supposed to deal with this particular problem? What questions do we want to ask them?" This discussion is followed by a sign-up for a first research action, typically involving six to ten members meeting with an expert or decision-maker for an hour in the late afternoon.

Throughout this period, although the clergy may not have a critical, up-front role in the meetings of the organizing committee, it's essential that close liaison be maintained between them, the planning committee leadership, and the organizer. Frequently the clergy are asked to chair the first action of the organization, so it's essential that there is a close working relationship between all the key players, that it gives rise to a solid understanding by the clergy about the objectives, methods, and leadership approach of the organizing committee.

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