



ASSESSMENT & ACCOUNTABILITY

**For community wellness and
sustainability**

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for the Canadian Unitarian Council



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Introducing

Assessment and

Accountability

01

Welcome to your toolkit on assessment and accountability tools for sustainable community!

This is a practical toolkit to help support your work wherever you are in the process of assessing your community's possibilities. It is never too early or too late to do an assessment and this toolkit will help demystify that process. It offers you a variety of ways to explore assessment AND accountability practices to help your community thrive in sustainable ways.

Assessment is a complex matter. These resources pull heavily from adrienne maree brown and Dean Spade, as well as a few other experts on this topic to emphasize that how we assess capacity, harm, need, and desire helps to determine what is imaginable and what is possible.

Assessment helps us clarify;

- What we actually have (vs. what we wish we had)
- What we are resourced to sustain
- What our values ask of us
- What/ who we are accountable to or for and how that shapes our decisions and their impact

Without assessment, accountability collapses into urgency or guilt or performative action. With assessment, accountability becomes relational, strategic, sustainable, and above all else, encouraging.³

Assessment



There are lots of different ways to map resources and assess capacity, skills, and possibilities. One of the most important things to keep in mind with any assessment tool is whether or not it's helping you ask the right questions for your purpose.

In the next few pages you'll find tools for individual assessment, group assessment, power and risk assessment, values-based assessment and more. It may seem overwhelming, but you don't need to use all of them for every project. Start with yourself, then work outward from there.

If you're in a group, make sure you're doing an assessment as a group. Make it clear to each other that there is no judgement in assessment, judgment gets in the way of reality and creates systems that lead to burn out or scarcity.

Ground yourselves in the knowledge that an assessment is an opportunity to really understand potential and the only way you can do that in a sustainable way is if you're transparent about your own needs and capacities as well as the organizations.

Let yourselves take the time needed as an act of love for yourselves and the project you care about.



What is an Asset?

Before we start, here is a general break down on what assets are from [A Guide to Community Asset Mapping offered by the Tamarack Community](#), pages 4 and 5.

Assets are what we want to keep, sustain and build upon for the future. They come in many shapes and forms:

- **Natural** assets are what we have in our natural environment: water, wood, minerals, wildlife, fertile soil, etc.
- **Built** assets are physical structures like buildings and public infrastructure (recreational facilities, water and sewage treatment, etc.)
- **Social** assets are the values and culture of the community, including traditions and attitudes of sharing, cooperation, and mutual support.
- **Economic** assets are the jobs and businesses which provide livelihoods.
- **Community**: A social group, of any size, in a given locality, who share governance and a common economic and/or cultural history.
- **Public** (service) assets include medical and educational services – hospitals, schools, municipal services and others provided by governments.
- **Intangible** assets are usually undiscovered or underutilized skills, expertise and willingness to volunteer and participate in working towards common goals

Before You Start

Assessment and accountability conversations activate threat responses because we are conditioned to think in punitive rather than transformative ways. Try these to help:

Capacity Check:

Feet on the floor
Name 3 sensations
Rate your nervous system
Breathe
Adjust your expectations accordingly

Boundary Breath:

Inhale "I can contribute"
Exhale "I do not have to carry everything"

Integrity Scan:

With one hand on your heart and one hand on your stomach ask yourself:

Does this commitment feel expansive or constricting?
Is this aligned or performative?

Keep in mind: It is common to have reactions and triggered responses to accountability work. Defensiveness, shut down, fighting, people pleasing, dissociations, avoidance, anger... all of that are normal varying responses to feeling "attacked" which is a feeling accountability often brings up. Get in a practice of regulating before seeking resolution. It's ok to move slowly, to take the time to separate harm from identity and be intentional about reconnecting.

Assessment Tools- Self

Individual Capacity Scan: adapted from adrienne maree brown's work in Emergent Strategy on fractal thinking (how the small reflects the large)

Map out 6 quadrants:

- Time capacity (time is finite, what is already on your plate?)
- Emotional capacity (energy is also finite, what is in your heart right now?)
- Skill capacity (what skills do you have that you can offer?)
- Material capacity (what resources do you have? Money? Space? Tools? A kitchen?)
- Relational capacity (who are you in trusting relationships with?)
- Spiritual capacity (what sustains you and how much access do you have to it?)

As you reflect on your quadrants, ask yourself:

What can I reliably offer without resentment or burn out?

What drains me consistently?

What do I need to stay in integrity?

*When you know you'll be doing a group assessment, try to find time to do a self assessment first, so you have clarity on what you can and can't offer before you show up for the group.

Assessment Tools- Group

Community Resourcing

Draw three circles and name them, “individual gifts”, “institutional resources”, and “associated networks”

Fill in the circles asking yourself;

- What skills already exist among us?
- What resources do we have?
- What resources have we forgotten we have?
- What informal networks/relationships carry the most trust/leadership?
- What modes of communication are most valued?
- What already exists?
- What/Who is missing?

See where they overlap.

Power and Risk Assessment

Thinking about justice and community organizing movement traditions.

Set up 5 rows or columns with the following;

- What is the goal?
- Who has decision making power?
- Who will be impacted?
- What risks are involved?
- What protection strategies are there?
- What/Who is missing from the conversation?

Assessment Tools- Group

Sustainability Scale

Inspired by adrienne maree brown's book Emergent Strategy thinking about adaptation.

With your project in mind, rank for yourself from 1-5 (low to high) the readiness you feel around:

- Emotional Sustainability
- Financial Sustainability
- Financial Sustainability
- Volunteer Sustainability
- Leadership Succession Plan
- Conflict Repair Capacity

Low scores indicate where accountability structures must be strengthened.

Values Alignment Audit:

Inspired by pleasure activism and transformative justice models of growth.

With your project and involvement in mind ask:

- How alive does this make me/our community feel?
- Who benefits most?
- Who carries any burdens and what are they?
- Does this align with our stated values?
- Are we replicating extractive dynamics? (relationships or situations that take more than they offer, often leading to burn out and sometimes other emotional/material abusive dynamics)

Assessment Tools- Group

Desire Map Inspired by adrienne maree brown's book *Emergent Strategy*. There are several assessment tools within this book which are highly recommend for exploration!

Write or draw out your ideal plan, let your ideas flow as a group or as individuals. Spend time imagining what a thriving future of this project and/or community looks like.

Special note: Avoid focusing on deficits and urgent needs that lead to reactive thinking; try to stay in an emerging and abundant space to create your desire map. If you notice yourself thinking reactively or with scarcity in mind, take a short break to interrupt that pattern before continuing.

Combine this map with another one of the listed assessment tools to compare present and future desires. Then, note differences, lessons, feelings, and reflections that came up either alone before joining together to compare and discuss, or as a group.

Some questions to reflect on taken from adrienne marie brown's *Emergent Strategy* Assessment on Possibility:

- What are all your gifts?
- Are you living a life that honours all your gifts?
- If yes, how did you create all this possibility for yourself?
- If no, how can you create more possibilities today?
Tomorrow? This month? This year?
- What are your organizations unique gifts? Is your organization able to hold complexity?

Assessment

Tools- Leadership

Leadership Style The following is taken from Dean Spade's book *Mutual Aid: Building Solidarity Through this Crisis (and the next)* which also provides several supporting tools to explore for community organizing.

This is a very abridged version of a chart he has called: Leadership Qualities Supporting Mutuality vs. Hierarchy. [Follow this link for the full chart and break down](#), or get a copy of his book.

| Hierarchical Leadership Qualities | Just and Accountable Leadership |
|---|---|
| Successful by dominating others/being the decider | Supports the growth of decision making processes that include everyone effect by the decision |
| Concerned with maintaining reputation, looking like "the best", looking "right" | Willing to admit mistakes |
| Fosters competition in the group | Fosters compassion and a desire that no one is left out of the group |
| Impulsive, plans change on a whim | Holds steady to the groups' decisions and purpose; reliable |
| Outcome-oriented | Supports processes with integrity that lead to more people participating in decision-making |
| Controlling, micromanaging | Can delegate, can ask for help, wants more people's participation rather than more control |

Assessment Tools-

Organizational

Organizational Culture The following is taken from Dean Spade's book *Mutual Aid: Building Solidarity Through this Crisis (and the next)* which provides several supporting tools to explore for community organizing.

This is a very abridged version of a chart he has called: Qualities of Organizational Cultures. It is meant to help us think more critically about non profit structures and organizing styles. [Follow this link for the full chart and break down](#), or get a copy of his book.

| Aspirational Qualities | Challenging Qualities |
|--|---------------------------------|
| Reliable, responsible, punctual, follows through | Flakey, late, no follow through |
| Welcoming to new people | Unwelcoming |
| Flexible, experimental | Rigid, bureaucratic, formulaic |
| Collaborative | Isolationist, competitive |
| Realistic workload, sustainable, real culture of wellness and care | Overworking, martyrdom |
| Direct feedback and growth | Silence and/or gossiping |
| Forgiving | Holds grudges |



Key Values of Democratic Organizations:

Taken directly from Dean Spade's work are these points of democratic organizing. From his article from December, 2018 called "Organizational Culture chart"

Transparency and Participation: We all know how decisions are made, how the money comes in and is spent. We can all participate in decisions that are important to us. Smaller delegated decisions are in service to a larger goal or objective that everyone agreed on and smaller teams or individuals are implementing. There are not hierarchies that make some people have more decision-making power and information than others (e.g. Executive Director decides direction of the work alone or decides who to hire and fire and who to pay what in secret).

Accountability: Our priorities come from our principles, and our actions match our priorities. We do what we say we are going to do and for the reasons we say. We are responsive to the communities we say we serve rather than to elites or our funders' priorities.

Planning and Clarity: We plan ahead and know why we are doing things. We value balance, taking on the right amount of work that we can do well, assessing the most strategic action. We are based in shared values and a shared imagination of liberation, not reactivity.

Ways to use these charts:

Again taken from Dean Spade's work are suggestions for how to engage with the charts above:

- Write or talk in your group about what is missing from these lists.
- Circle qualities you see in yourself that you are working to cultivate and grow. What might help them grow?
- Circle qualities you see in yourself that are challenging or don't fit your values. What helps you move toward not acting out of those qualities? Where did you learn those qualities? How did they serve you? How did they get in the way of what you want or believe in?
- Notice qualities that are prevalent in organizations you are in. What could help cultivate the ones you think are beneficial and reduce the ones that are harmful?

We leave this section with this quote by Dean Spade:

"Organizational culture can be changed, and is changed by new people entering, people changing their behaviors, and the context and conditions shifting. We can intentionally change organizational cultures by opening up conversations about an organization's tendencies and methods, talking about what is working and what is not, reflecting on how own own behavior can match what we want more, influencing each other."

Congregational Assessment Worksheet:

Use this worksheet as a general framework for assessing where you are as a congregation. This assessment worksheet can be done at any time! But is especially useful before starting a new project.

Part 1: Values

What are our top 5 stated values?

When was the last time they were revisited?

Who participated in defining them?

Where do our practices contradict our values?

Score 1-5

- Clarity of mission
- Shared understanding of justice commitments
- Alignment between preaching and practice

Part 2: Power and Governance

Who makes decisions?

Who sets agendas?

Who controls finances?

Do marginalized members hold real authority?

What is the difference between informal and formal leaders?

Score 1-5

- Transparency of decision making
- Access to leadership roles
- Anti-racist actions
- Clear conflict resolution pathway

Part 3: Resource and Capacity Inventory

Quantitative:

- Budget allocated to justice work
- Volunteer hours available monthly
- Staff Capacity

Qualitative:

- Emotional resilience of leadership
- Burnout levels
- Succession planning in place?

Score 1-5:

- Financial sustainability
- Leadership sustainability
- Volunteer sustainability
- Administrative capacity

Part 4: Accountability Practices

Do we have a feedback system?

How do we respond to harm?

When was the last conflict repaired well?

Do we track commitments publicly?

Score 1-5

- Feedback accessibility
- Transparency in finances
- Responsiveness to marginalized people
- Follow through on public commitments



Part 5: Relational health

Is disagreement welcomed?

Are difficult conversations avoided?

Do leaders model repair?

Score 1-5

- Trust levels
- Conflict literacy
- Repair culture

Part 6: Anti-Oppression and 8th Principle

How is anti-racism upheld?

Who benefits from current structures?

How is land acknowledgement lived beyond words?

Score 1-5

- Anti-racist training/knowledge
- Budget aligned with equity work
- Leadership diversity
- Concrete reparative action



Scoring:

Mostly 4-5:

Ready for expansion!

Mostly 2-3:

Strengthen internal structures and relationships before expanding

Mostly 1-2

Focus on repair and sustainability before launching new initiatives.

Reflect on the following after going through this worksheet and your scoring:

- What can/should we stop doing?
- What can/should we strengthen?
- What are we uniquely positioned to do?

Make this an annual practice! Connect together and review:

- Commitments
- Accomplishments
- Mistakes
- Feedback
- New goals

Be small, specific, and measurable!

Accountability

Accountability is relational practice within a structure. Accountability shares similarities with concepts like consequence or responsibility – since they are responses that follow an action or a commitment – but they don't equal the same thing. Accountability does not inherently involve anything wrong, shameful or punitive. At its core, accountability is a discipline – it is the practice of following up with our commitments and living in alignment with our values.

Accountability is how we acknowledge and stay connected to responsibilities we hold. Through intentional actions, we stay on track and maintain good relationships with ourselves and each other. Accountability can be a meaningful gift that fosters deeper connections grounded in transparency, encourages reflection, and when necessary, supports the process of repair.

There can be no repair without accountability. It touches some of our most tender parts – fear of rejection, shame, embarrassment, discomfort, annoyance, jealousy, trust... these feelings, deeply human, are often set aside or ignored. Accountability calls them forward and gives us the opportunity to work through them. This is hard, since this demands vulnerability and courage. Accountability gets a scary reputation because it asks for us to be brave and face uncomfortable truths. Yet, accountability is ultimately an invitation to courage and a gift to be invited into relationship where someone cares enough to seek reconnection.

Just like with assessment, the tools below for accountability can be used for yourself, or with others. Once you've assessed a situation and made a plan, use the tools below to help keep you on track.

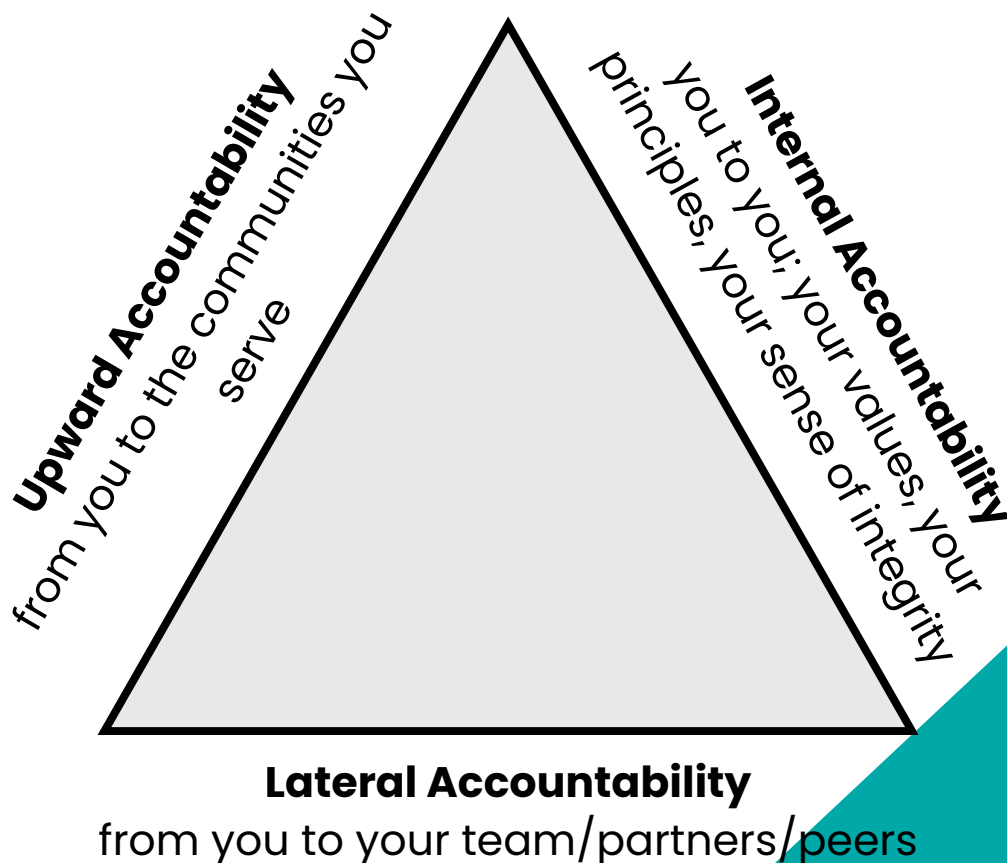
Accountability

Tools- Self

Accountability Triangle: accountability is a living and engaged process that has an inherent flow and relational path. Use this triangle as a reflection option to explore where and how you fit into the accountability triangle in different spheres of your life.

When you want to commit to something, look at the triangle and ask yourself:

- Who are you/we accountable to?
- How can they give feedback?
- How do we respond to harm?



Accountability Tools- Group

Feedback Infrastructure: Feedback is a major part of accountability, because it encourages active listening and an opportunity for participatory governance and restorative justice that helps you and your community grow.

A few options:

- Anonymous forms/surveys
- Regular reflective circles
- Community listening sessions
- An Ombudsperson
- Rotating Process Observers for meetings

Community Project Accountability

Inspired by Dean Spade's book *Mutual Aid*, there are specific practices to take into account when involved in group justice oriented endeavours. Accountability in justice spaces and in mutual aid efforts is very important. In addition to having regular assessments of the project, accountability looks like:

- Regular reflection meetings
- Clear role definitions
- Transparent financial tracking
- Established conflict resolution pathways
- Clarity on decision making processes
- Succession planning that make space for burn out

Accountability Tools- Group

Responsibility Covenant

My UU Principles call me to be accountable in relationship.
I will...

WELCOME

Welcome people to share what's on their hearts in a way that is authentic to them and receive their offering with gratitude.

ENGAGE

Engage my body, mind, spirit, and emotions in learning and embrace different perspectives.

INQUIRE

Inquire into discomfort that arises when my security, worldview, privileges, traditions, protocols, and values are challenged.

ASK

Ask questions with the intent to deeply understand the person's views and resist the urge to make it about me, and what I think I know.

RESIST

Resist urges to debate, analyze, censor, criticize, project, dismiss, minimize, moralize, silence, and perform etc., to deal with my discomfort.

EMBRACE

Embrace discomfort as an invitation to focus inward on personal transformation. If needed, I will seek out pastoral support to process my feelings in a private setting.

Another tool for accountability familiar to Unitarian Universalists is our practice of covenanting. Above is a responsibility covenant designed with equity, justice, and community building in mind by the Canadian Unitarian Council's Justice and Equity team. You can find out more about this tool and the process by which it was created and implemented at this link here.

Accountability

Tools- Discomfort

Be proactive about embracing accountability - prepare for discomfort, tension, and conflict as you engage in assessment and set up your commitments. Anticipating these challenges is a valuable practice in fostering accountability.

Creating clear pathways for conflict resolution is essential in practicing accountability. Regular check ins are opportunities to address concerns and build trust, and are as important as the chain of command - establishing who to talk to when harm happens or discomfort needs to be named. AND it's equally important to introduce moments of playfulness to help counter tensions or anxieties around naming discomfort.

Create a shared language to identify tension early.

- Red flag/yellow flag language
- A bell to ring when tension gets high
- An item or space in your office that denotes wanting to be heard

When roles are assigned, get in a practice of clarifying;

- What are you committing to
- What supports do you need
- What are your limits
- How will you communicate feeling challenged or strained?

Go back to the assessment tools and pick one or two to ground into 2-3 times a year as projects move forward.

Creative Prompts

Here are a few creative prompts to help you get into a flow to think about assessment and accountability. Because these are things that permeate all aspects of our lives, sometimes it can feel messy to navigate. Take a few breaths and do some creative play to help you clarify what you're looking for.

Reflection Questions for any time:

Self:

- Where do I overextend myself in the name of justice?
- What do I confuse with accountability? (urgency? shame? guilt?)
- What am I unwilling to be accountable for?
- What does justice feel like for me?

Community:

- Who feels most ownership of this work?
- Who feels least heard?
- What patterns of harm repeat?
- What conflict do we avoid?
- What does repair look like here?
- Are we resourced for the justice we claim?
- Who is missing from decision making?
- What does accountability to land look like?

Creative Prompts

Draw your ecosystem:

Roots (values)

Soil (resources)

Weather (external pressures)

Trunk (current self)

Branches (connections)

Fruit/Flowers (Impact)

Rot (harm patterns)

Ask yourself:

- What do you notice?
- What needs nourishment?

Write a letter from the future:

From yourself or from your community in 5 years, in 20 years, in 7 generations asking:

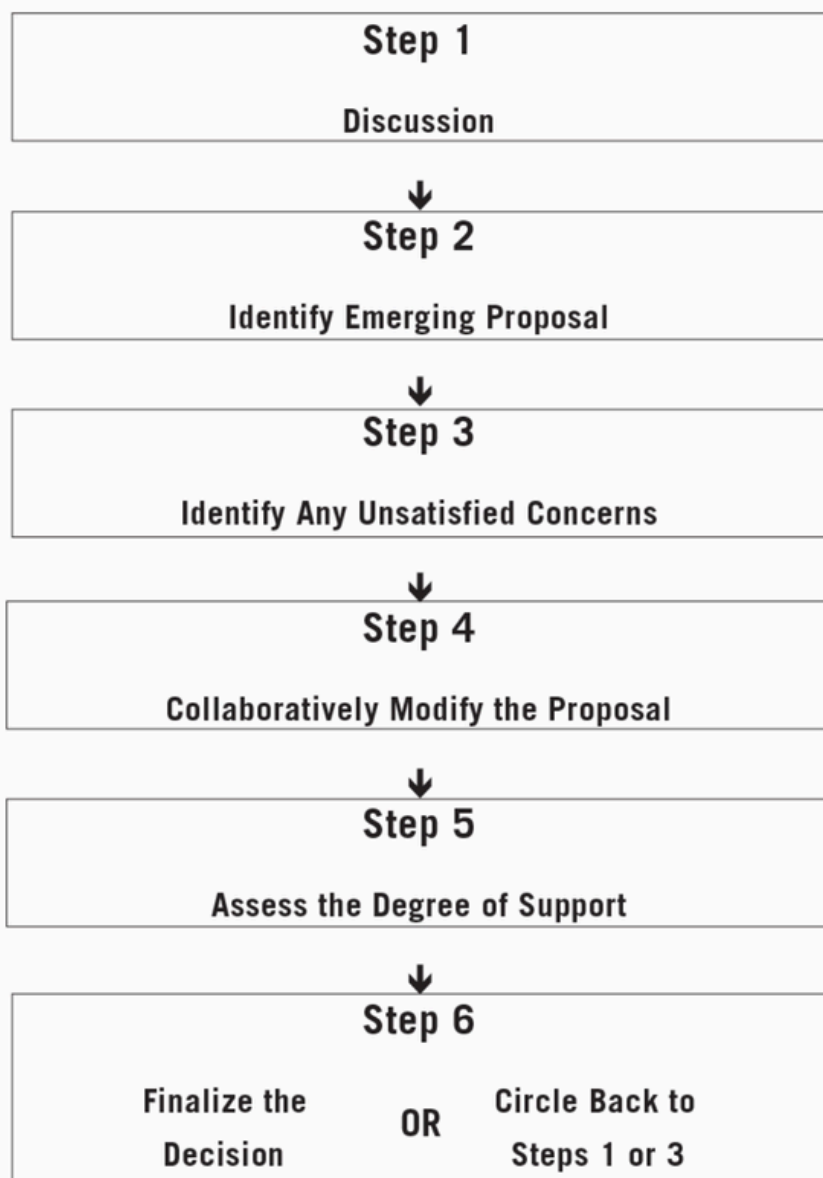
- What did you stop doing?
- What did you strengthen?
- What accountability practices saved you?



Making Decisions

Another decision making tool from Dean Spade's Mutual Aide: Building Solidarity During this Crisis (and the next)

Chart 5. Basic Steps to Consensus Decision-Making



Making Decisions

A Flow Chart for Decision Making

1. Does this project align with our stated values and principles?
Ask: Which value is this project expression? Who named this priority?

Yes: go to step 2

Maybe: clarify and ask again

No: do not proceed

2. Have the people most impacted by this issue been consulted?
Ask: Are we being invited into this? Are we centering ourselves?

Yes: go to step 3

No: pause and build a relationship first. Justice work must be accountable to those most affected first and foremost.

3. Resource and Capacity Check

Rate from 1-5

- Leadership Capacity
- Volunteer Capacity
- Financial Resources
- Material Resources
- Emotional Sustainability
- Conflict Repair Capacity

If you rank yourselves as a 3 or above for at least 4/6 of the above, go to step 4.

If you ranked mostly 1's or 2's with few 3's or above, consider scaling down or delaying to regroup and replan.

Remember, as emergent strategy reminds us: small is good. Right sized is sustainable.

4. What are the risks present?

- Legal
- Financial
- Reputational
- Safety
- Internal conflict

Name what's present and rank them again from 1-5.

If risks are high ask, who absorbs that risk? Do we have mitigation strategies?

If you don't have a plan for risk, don't proceed.

5. Accountability Structure

- Before you launch, name:
- Who are you accountable to?
- How will feedback be gathered?
- What happens if harm occurs?
- Who holds facilitation/processing responsibilities?

If these are unclear, build structure first.

6. Exit Strategy:

- How will we know when to stop?
- Define clear goals
- Review a timeline
- Express conditions for ending or transferring leadership.

No exit or review plan leads to burn out, mistakes, and harm.

7. Final Decision:

Based on your answers and assessments, there are many options ahead;

- Proceed
- Proceed in smaller pilot form
- Delay and resource Build
- Decline and communicate clearly

3 Question Emergency Filter:

When urgency hits ask:

- Is this ours to do?
- Are we resourced to do it well?
- Will this deepen relationships or strain them?

Weaving in our UU Principles

Our 8 Principles are foundational tools for assessment and accountability. Each principle offers a unique opportunity to reflect on how it is lived out and to identify areas for development and growth.

Each Principle is an invitation to reflect on how it is being upheld in our lives. They can also be guides or reference points - much like our covenants - for our commitments to our values as people of this faith.

Our principles call us to be accountable to the dignity of every being, to assess and clarify whether justice is substantive or merely symbolic, to engage in decision-making structures, and to dismantle systems of oppression whether they impact other people or the natural world around us.

Things to ask:

- Are we accountable to those most impacted by injustice? How do we measure that?
- Does our governance structure reflect our wants and needs for inclusion and harm reduction? Do our policies?
- How do we repair harm inside our congregations? What is the established protocol? How do we get feedback?

Accountability Pitfalls



It is absolutely normal to make mistakes and run into conflict or disagreement when moving through these processes. It is true that finding consensus in a participatory way takes time and patience; it is almost certain that there will be roadblocks and barriers that will need to be worked through.

Below are a few common blocks and pitfalls to be aware of. As with all things, it is important to move at the speed of trust (am brown).

1. Urgency Culture

Urgency often feels morally justified. Harm exists now, and people want to respond immediately.

However, urgency can create:

- rushed decisions
- burnout
- shallow engagement
- poorly designed projects

Questions to ask:

- Are we reacting or responding?
- What would slowing down allow us to see?
- Is this work sustainable for the people involved?

Move at the speed of trust, take your time to be in sync with your actions to ensure they are addressing the needs as well as the fruits.

2. Martyrdom and Overextension.

In non profit, community sector, activist and justice oriented spaces, we can all fall into patterns of over-extension for a cause we care about. That care is a beautiful thing but it is important to remember that our energy is finite, even if our love is not.

Signs of martyrdom culture:

- exhaustion is normalized
- boundaries are viewed as selfish
- the same people carry most of the work

Healthy accountability includes accountability to capacity.

Questions to ask:

- Who is carrying the heaviest burden?
- Who is consistently asked to give more?
- What would equitable workload look like?

3. Avoidance of Conflict:

Communities committed to kindness sometimes avoid difficult conversations. This repeats patterns of harm instead of offering accountability, changed behavior and repair.

This can result in:

- unresolved resentment
- passive-aggressive dynamics
- people quietly disengaging.

Accountability requires conflict literacy.

Reflection prompts:

- What conversations are we avoiding?
- What fears arise around naming harm?
- What support do we need to engage conflict skillfully?

4. Performative Accountability

This can look like:

- symbolic apologies
- statements without structural change
- social pressure replacing relational repair.

Accountability should prioritize:

- those harmed
- meaningful repair
- changes in behavior and structure
- transparency

Questions to ask:

- Who benefits from this response?
- Does it actually repair harm?
- What structural change accompanies this statement?

5. Saviourism

Communities working towards justice sometimes take on projects that are not rooted in relationships. This comes from working in a charity mindset rather than a solidarity mindset and reproduces colonial dynamics.

Reflection prompts:

- Were we invited into this work?
- Who defined the problem?
- Are we accountable to those most impacted?

Mutual aid frameworks remind us that solidarity must replace charity.



Resources and Further Learning

- Emergent Strategy: Shaping Change, Changing Worlds by adrienne maree brown
- Pleasure Activism by adrienne maree brown
- Mutual aid: Building Solidarity During This Crisis (and the next) by Dean Spade
- Fumbling Towards Repair: A Workbook for Community Accountability Facilitators by Mariame Kaba and Shira Hassan
- Abolition Geography: Essays towards Liberation by Ruth Wilson Gilmore
- Peacemaking Circles: From Conflict to Community by Kay Pranis
- The Little Book of Restorative Justice by Howard Zehr
- INCITE! Women of Color Against Violence
- Tamarack Community Workshop on Community Assessment
- CUC Responsibility Covenant

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