

# Using Engagement Skills to Improve Community Assessments

## Joining “Micro” and “Macro” Through Tactical Self-Awareness

### THE PREPLANNING BEGINS

The two macro practitioners were about to sign off when Ellis sat back and whistled for a moment. He could see Kay's bemused expression.

“Kay, remember when we hugged back in Grant Park in '08? We were so hopeful and happy. And I had some disappointment, too. Thought for sure that anti-gay Proposition 8 in California was going to be defeated, but it wasn't. Thought marriage for me and Rob was off the table for a long, long time. But now the Supreme Court's hearing the case—and the fight's being led by a Republican lawyer!”

“And look at Maine and Washington State! People voted it in!”

“And Obama was the first sitting president to support us!” Ellis shook his head in silent wonder. “It's crazy times, but maybe that man in the Oval Office assesses some things better than we give him credit for.”

“Like they say, it's a lot harder to govern for change than to campaign for it. He and his people know how to crunch numbers way better than we did.”

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"He sure keeps doing that 'ongoing assessment' work better than we started out, don't you think?"

They both laughed, remembering their first difficult work together. As they signed off from Skype, each was reflecting on how they met in 1990 in their first macro-organizing class, and their dreaded group assignment—a community assessment of their own choosing. Sitting together in a small classroom, there were four of them in the group: Ellis; Kay; Esperanza, an older Puerto Rican woman who'd gone back to college after her children were grown and had completed her undergraduate degree in 3 years; and Jill, a quiet White woman whose luminescent brown eyes grew tight only when Kay and Ellis argued, which was often.

"So we chose Harlem to look at. There's so many oppressive conditions there, I say we just take poverty and racism and that's enough. I mean, look at how poverty's grown over the last 10 years!" Ellis was as emphatic as he was certain as the group members met for the first time.

"Well, yeah, sure, but couldn't we slow down a bit and find out why we chose Harlem? It's not the only community in New York. It's not even the only Black neighborhood. We must have our own reasons. Couldn't we start there, at least a little?" While less certain, her voice trembling slightly, all the group members noted that Kay was no less emphatic in her request.

"*You're* telling me about Black neighborhoods?" Ellis gave Kay a withering look.

"I wasn't telling anybody anything. I was just trying to slow down and learn about each other and why this assignment might matter in some special way to each of us." She looked at the others for support. "Maybe we all can agree on a focus together after that."

"Whatever." Ellis continued to stare at Kay. "I just hope we move on to the work sooner rather than later. Racial oppression isn't solved with talk-talk-talk."

Esperanza spoke up. "So let's take a minute or two, okay? I chose to look at Harlem because it's pretty close to my community, East Harlem, and my daughter's first middle school was there. We could even walk to school from our apartment, but the school was so bad I had her transferred out in a month. That was 10 years ago. Now I see that the cuts in education keep coming, but they keep talking about school reform, too. I want to see if that school has gotten any better." Without speaking, Jill got up and wrote "Schools" on the blackboard.

Kay spoke next. "I worked for 4 years in a homeless shelter, and some of the staff I got to be friends with come from Harlem. They told me about what a great place it was, with the Apollo Theatre, restaurants like Sylvia's, the architecture, the famous churches with Adam Clayton Powell, Jr. It also has one of the largest numbers of homeless shelters in the city. So I thought I could learn more about how people handle homelessness, even with all the poverty and drugs the papers are writing about. People up here may have answers about how to get people into permanent housing that we could learn from, I'm sure." Jill paused, and then wrote "The homeless" and "Local resources."

It was Ellis's turn. "I already know Harlem. I don't need a tourist's trip to visit there. Walk away from 125th Street and you'll see problems galore: poor housing, men and women out of

work, kids with nothing to do except hang out and end up in jail. Poverty goes up, prison levels go up, too. Like they say, when America gets a cold, the Black community gets pneumonia. Hey, the issues in Harlem come from the conditions of oppression created over the last 350 years. If we're going to help young people, whatever we do up here better deal with that reality." Jill wrote "Poverty," "Oppression," and "Prisons" on the board. Wordlessly, Ellis got up and added "Youth."

Jill was the last to speak. "My best friend in high school lived in Harlem until she was 13. Then something happened to her brother, and her family moved to Long Island. She told me she was happy to be with so much green all around her, but she missed the friends and family members she saw on the street every day. Her family came back to church there every Sunday, a 2-hour commute each way. It always amazed me that she never complained about the trip." She paused, and looked keenly at her group members. "I thought it would be great to find out why." Kay wrote "Connections" and "People" next to "Local resources."

"So now what do we do? The whole community is too big to work on." Ellis looked at the blackboard. "Youth, schools, oppression, poverty, homelessness, and the people and resources to fight back. How do we narrow this down to make it mean something?"

"And make it manageable so we get it done?" added Esperanza.

Their first meeting broke up soon after—the three women pleased with their progress, the lone man frustrated that they were still talking and not doing something. Much to Ellis's dismay, it would take them a month of meetings, twice a week, to make their project both meaningful and manageable. Looking back, he would later say it was one of the most painful group experiences of his time at school. It was also, he readily admitted, one of the best learning experiences.

*Educational Policy 2.1.1—Identify as a professional social worker and conduct oneself accordingly. This chapter emphasizes core competencies related to how social workers "practice personal reflection and self-correction to assure continual professional development; attend to professional roles and boundaries; and demonstrate professional demeanor in behavior, appearance, and communication."*

## **THE PREPLANNING PHASE TO COMMUNITY ASSESSMENT: CLARIFYING ASSUMPTIONS OF COMMUNITY**

### **Strategic Step 1: The Preplanning Begins to Clarify Assumptions on Why the Work Matters for the Group**

While often given short shrift, one of the most important phases of a community practitioner's work occurs during what others have called the preplanning phase of a

group (Glasser, Sarri, Sundel, & Vinter, 1986; Rothman, 2008). Preplanning is when people discuss and clarify the basic assumptions of what community (or problem) they are examining. During preplanning, a community group frames the basic ways it will approach the actual planning and assessment undertaken. While preplanning can appear to be less labor intensive than sifting data, interviewing people, and analyzing trends, its work is the foundation on which the assessment will be measured for its effectiveness.

For example, our four students of macro practice in the case study each carried distinct assumptions about the community they were about to assess.

- Esperanza spoke in terms of a *geographic community*, one made distinct from others by certain assumed physical borders that made Harlem different from East Harlem (Fellin, 2000; Warren, 1987). Such geography has set limits to its borders even though the actual borders may be defined not only by space but also by shifts in population (East Harlem is more Hispanic; Harlem is more African American) or activities (the commercial strip of 116th Street is seen as the dividing line between the south—East Harlem—and north—Harlem).

- Kay's interest in the homeless given shelter in Harlem and those who worked with them related to a *functional community*. Her emphasis was on the shared activities and functions of a group of people responding to a particular problem. Added to her definition was interest in the particular resources of the community applied within this functional community, a dimension of *bridging social capital* among organizational members. Bridging social capital is created among those networks of affiliations that join professionals and community members in shared activity so that a defined problem across that community—in this case, the functional community concerned with homelessness—is dealt with more effectively than otherwise might occur (DeFilippis & Saegert, 2007; Putnam, 1994).

- Jill's story of her best friend highlighted a *community of shared interest and affiliation*. While similar to a functional community in its shared interests found at church, its emphasis is on the *bonded social capital* that does not necessarily extend beyond the particular church itself. While less integrative, functionally, across a larger community's population (it was, after all, just one church), it adds deeper emotional ties of long-term affiliation that a functional community will not (Anton, Fisk, & Holmstrom, 2000; DeFilippis & Saegert, 2007; Putnam, 1994).

- Finally, Ellis's mix of historic conditions and common problems of an entire group of people refers to the classic *solidarity community* based on race, religion, ethnic heritage, or ideology. As such, it can be located inside both geographic and functional communities as long as groups recognize and find common solidarity in that reference. For example, such a community of shared interests based on historic background remains of prime

concern to people of color, has a more varied response among some White ethnic/religious groups (Reform Jews and Lubavitcher Jews in the United States), and is less easily defined for White Protestants (Winters & DeBose, 2002).

### REFLECTIVE QUESTIONS



What is the definition of *community* that your campaign or agency works from? What is the strength in that definition? Is there a potential limitation?

### Why Preplanning Matters

It is through the airing of what people mean by *community* that a group begins to sort through what it is interested in assessing and why. This sifting matters, because otherwise a group's members could be looking at the same issues through different lenses. Data collected, interviews undertaken, and implications drawn would all appear with different emphases: Ellis would locate connections to the past, while Kay would be trying to interpret the same data for the future. Jill would be drawn to what happened inside a bonded community, while Esperanza would seek data to spot trends across a geographic community and perhaps beyond. As community groups have limited resources, especially related to time and money, the necessary sifting of assumptions so that a group agrees on what it will and will not be addressing is the bedrock on which the group's eventual results will be evaluated.

Finally, with the exception of Jill, whose focus was drawn to affiliated church activities in the area, all the others mention the defensive and reactive posture common to poorer neighborhoods and their professional allies in the early 1990s. Esperanza thought about assessing what happened at one school, not in the whole school system. Kay was concerned about how to work with the homeless on housing relocation. Even Ellis, while concerned about systemic issues, had begun to narrow his focus to one group of people—youth—rather than considering all the residents of Harlem.

As such, their implicit level-one assessments took as a given that a poor community in the 1990s was worse off than it had been and that its actors would be fighting an uphill battle for community needs to be met. Fitting this level-one assessment into their overall practice framework was a necessary adaptation to the political and economic dynamics of the day. Had they been looking for and proposing wide-scale social movement activity or a more far-reaching set of demands on what they thought was achievable, they would have been strategically ineffective before they began their actual work. Today's macro practitioners will be called on to make their own level-one assessments under conditions that may be quite distinct from those of Ellis, Kay, and their classmates.

## FROM PREPLANNING ASSUMPTIONS TO PLANNED ACTION: CHOOSING MEANINGFUL TARGETS AND TIMELINES

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### THE HARLEM GROUP GETS BUSY

"I don't care about what social workers want! It's what young people of Harlem want and need that matters!"

"Ellis, will you stop speaking about 'the people'? Aren't social workers people? Aren't we?" Kay and Ellis were disagreeing for the third time that afternoon.

Finally Esperanza interrupted them both. "Listen up, you two! Ellis, Kay wants to look at youth programs to see what they need so they can be improved. Kay, Ellis wants to make sure young kids of color have their voices heard. You know, it is possible to do both. Something could benefit the program professionals and the kids. It's not one or the other, right?"

"I just don't trust the focus on what professionals in programs have to say. Professionals have been living off the lives of poor people forever." Ellis folded his arms across his chest and turned away from his combatant.

"And I don't trust something so vague that it just ends up making some political point but doesn't do anything to actually help anybody. What good does it do to remind people they're oppressed if you don't do anything to help?" Kay bit into her pencil, chewing the final piece of eraser off.

"Esperanza's right." Jill spoke for the first time that afternoon. "Let's just start by focusing on prospects for youth in Harlem and go from there. We don't even know what we're concretely talking about yet. Maybe if we look at some actual data we can narrow down what we're looking at. Is it job prospects? School prospects? After-school prospects? Let's do the work and find out." Jill looked at Kay. "That means we can look at programs as well as people." Kay nodded in quiet assent. "And of course we have to talk with young people, Ellis. They're central to our work, right?"

Ellis was quiet for a moment, then pulled a neatly sorted folder from his briefcase. "Actually, I did some data sorting already. I went over to the Community Planning Board and got data on all the issues we've been discussing: poverty, test scores, numbers of homeless." He ruffled through the material, selecting two pages that were both heavily marked with yellow highlighter. "These data sets stood out. The first one shows school dropout rates in Central Harlem." He pointed across a bar graph, showing the upward trajectory. "All the data show increasing dropout rates." He went on to explain three other highlighted graphs on the next page that connected these rates to where the dropouts lived, the percentage who came from single-parent homes, and levels of poverty.

The group was silent with their admiration for Ellis's work. "Where'd you learn to do that?" Esperanza asked.

Ellis blushed, then quickly looked away. "You know, when I was in school. I was always into math, liked to see what underlay things." He pointed at the pile of papers on the table. "This kind of work is fun for me."

For once, Kay laughed warmly. "Hey, no wonder we always fight! I hate math, and math hates me." Kay shyly reached into her large and obviously messy book bag and pulled out a single piece of paper. "I did speak with my field instructor, and she gave me a list of all the youth agencies in Harlem. Turns out there's a task force of social workers who meet once a month to discuss common problems and advocate on their agencies' behalf. My field instructor gave me the name and numbers of the chairperson to contact." She smiled again at Ellis. "Between your data sets and my contacts, maybe we could get something done!" A small grin momentarily appeared on his face as well.

While they were talking, Jill had been quietly writing on the blackboard. At the top were lists of specific tasks: collection of data, interviews with program professionals, interviews with youth in programs/not in programs, and interviews with community leaders. "Here's some things for us to do. How about we divide up? Ellis, you're good at data, so you handle that. Kay, you've got your task force, so you do those professionals. Esperanza, you probably know community leaders already, so maybe you could take them. I like to write lists, so I'll be the recorder/keeper of everyone's records." Her fellow group members looked at her, then began clapping. The quietest group member had gotten them to move!

She hesitated for a second, embarrassed by all the attention. "So let's set timelines for all the things in each section." They quickly did so, making specific suggestions within each other's lists of contacts, other data sources, and possible leads for more information.

Then Esperanza spoke again. "Hey, let's not forget one thing: Our macro teacher says we have to walk the streets, too, in pairs, and get to know the neighborhood as well as the people in it. So maybe we can get to know some of the kids that way. Okay?"

The group nodded in agreement. Then they drew straws to pair up. Naturally, Ellis and Kay wound up together.

### **Strategic Step 2: The End of the Preplanning Phase—"Problems" Are Tactically Clarified and Assessment Choices Are Made . . . at Last!**

The minor skirmish between Ellis and Kay in the above scenario is symptomatic of the classic confrontation that occurs in almost every initial macro-organizing class: an argument

between community organizers like Ellis who are motivated by ideological beliefs and who enter social work to find a well-paying, progressive job, and social workers like Kay who decide to do organizing as the best example of what the profession has to offer. Such differences crop up in the preplanning phase of a community group's work because each type of practitioner is having his or her core assumptions tested by the other. The battle over targets that so often occurs in groups is not only about the difficult choices one must make to effectively manage the assessment work; it is also about the struggle to guarantee that core beliefs about who matters will not be discarded. (The issue of who matters will be discussed in greater detail in Chapter 7.) Esperanza and Jill helped bridge the divide between Ellis and Kay by helping them see that their extremes could be encompassed within the same framework. By including both the voices of young people and a review of existing program needs, the group guaranteed that the target focus would have *meaning* in what it eventually accomplished. Working to bridge different group members' core interests is a primary task an organizer undertakes in this often tumultuous and important phase of a group's development.

### **Joining Targets to Meaningful Goal Achievement**

Jill broke through the group impasse and began to move toward problem clarity by sorting the target as "youth in Harlem" and the goal as "to better their prospects." While still vague, *prospects* was understood to mean both issues that concerned young people *and* programs that could meet them because of the clarifying, albeit intense, arguing of Ellis and Kay that had ensued in the preplanning phase.

In this way, the goal itself becomes a filtering lens as group members go about their tasks of data collection, interviewing, and analysis. As implied above, if a strategic goal is too vague ("helping youth"), the tasks at hand remain equally broad, forcing a group to later reassess as the questions asked and the answers given remain too broad for actual use. Likewise, a goal that is too specific (to help one particular program run better), while more manageable, may lack the meaning to one's work that a community group seeks for its young people. "Helping the prospects of young people" has enough specificity to clarify the direction of a group's efforts while remaining open enough to guarantee that key actors (both youth and professionals) are part of the group's eventual recommendations for change.

### **FROM ANALYZING A SOCIAL PROBLEM TO DISTINGUISHING "FELT NEEDS" LEADING TO ACTION**

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Both Ellis and Kay were wrapped up in compelling and heartfelt arguments about problems important to them. What they were not doing was using the assessment process to



move through problem definitions so that the eventual focus of their group's efforts was actionable and thus tactically meaningful. One of the hardest issues new practitioners have to confront is the difference between the genuine injustice of a social problem and a community's desire to act on that problem through a well-worked-out campaign. The importance of engaging with community members is that they serve as a powerful barometer in directing a group from a *heartfelt issue to a felt need*. Deploring the level of unemployment among young people (a genuine and heartfelt problem) and waging a campaign that all box stores in a community fill at least 75% of their entry-level positions with neighborhood youth between the ages of 16 and 23 (a potential felt need) is a difference in focus and strategic effectiveness.

Practitioners thus use preplanning and engagement phases of their assessment process to accomplish the following:

- *Analyze social problems* in the community, using survey and other forms of aggregate data to distinguish what seem to be key issues or problems of the community or neighborhood.

- *Understand the nature of the problem* so that issues eventually worked on will target solutions that resolve at least some of that problem's cause (or lay a foundation for doing so). Decrying a lack of housing is insufficient; focusing on a city's plans for low-income housing or housing lenders' loan programs for low- and moderate-income housing has located a source of an issue that, were it successfully challenged, could actually alter the housing market of a neighborhood. Such clarity moves a group from abstract, albeit heartfelt, concern to potential activity. While such a campaign may be long and require many levels of engagement, planning, and action, it is nevertheless a powerful antidote to the despair of widespread analysis of issues without focus ("the problem is too big").

- *Clarify the problem* in ways that can lead to focus and action. Knowing a source of the problem—the city has not supplied financial assistance for low-income housing development—shines a bright light on where things are wrong (lack of financial assistance) and how to make them right (use city revenues from the capital budget for this neighborhood). *Combining an analysis with what's wrong and a way forward to make it right* can create powerful energy in what would obviously be a long-term campaign.

- *Finally, this sifting process of problem definition helps community members and groups arrive at issues that they experience as felt needs*. The difference between a "need" and a "felt need" is the difference between a group of people bothered by conditions in the world and a group acting on the world to make it a better place for themselves and others. Practitioners engaged in community assessments need to go through the seemingly long process of moving from problem analysis to felt need so that together with community members they can *find issues that people care enough about and experience in ways that will motivate them to act*. The next section explores the strategic issues at play that go into how this process occurs.

## Connecting Meaningful Goals to Manageable Targets as You Move From Problem Definition to Action

Staying open to problem definition throughout, the assessment thus begins to move forward with planned tasks and strategic direction. Using the goal as a filter, a community group then separates out tasks that are manageable based on the group's resources related to *time, technology, and financial costs*. All three resources serve as balancing weights to the meaningful power embedded in the strategic goal. One may hold "change the world" as an overarching goal, but having a day or two a week to accomplish something that profound may require rethinking either your resource commitment (can you really give up all your sleep?) or making the goal itself more concrete and realizable. For our four practitioners above, manageability required a careful assessment of all three resources.

- *Time*: Work on this group assignment had to take place when members were not doing fieldwork (3 days a week), not in class (part of 2 other days a week), and did not work (three had part-time jobs of 20 hours a week, and Esperanza was in a work-related school program that let her go to school 1 day a week while she worked 10-hour days the other 4 weekdays). Such time constraints are typical for both social work students and people running community programs with volunteer members. This means that weekends, weeknights, and other free hours are the "time resource" this group has to work with.

- *Technology*: In 1990, Google was neither a powerful web search engine nor a verb used by people seeking information. While information could be found on the web, Ellis's legwork regarding the local Community Board was far more common for hard data searches than it will be in the 21st century. Today, web-based information can far more easily facilitate a group's need for hard data on the conditions of a particular program, population, or problem within a community. The Internet has greatly enriched community groups' capacities to mine data to develop powerful arguments related to needs and resources for a community group. For example, geographic information systems are used within many large urban as well as rural areas and are capable of tracking issues such as the impact of hurricanes on streets and neighborhoods so that zoning regulations can be strengthened. It is possible for citizens to report potholes, street crime, and transit problems using smartphones with city-based apps (see Esri, n.d.). Whether neighborhood blight (Shlay & Whitman, 2006) or community food assessments (Cohen, 2002), the use of hard data found on the Internet has so greatly strengthened a group's capacity and the ease with which it can make its arguments for change widely known that *not* using the Internet today would diminish a community group's credibility.

That said, the risks of technology have shifted from professionals' struggles to utilize it to the dangers of overreliance on Internet-based information as a substitute for

on-the-ground assessments of real people affected by the issue under review. Ellis's visit to the Community Board for data also created the opportunity to meet and interact with people from the community being assessed. The value of adding texture to the search engine's hard data on a community by gleaning informal information from such interactions as a practitioner goes about his or her work cannot be underestimated.

Furthermore, there are class and racial biases associated with both web utilization and the information collected via the web (National Urban League, 2009). Poor community groups, especially groups working with those most often perceived as being on the margins of public discourse (like the homeless in the 1970s), have sparse webpages and use their resources on program development, not Management Information Systems development. Their webpages likely will not reveal the work being done with a teen fathers' program, housing efforts with undocumented workers, or antiviolence activities on behalf of homeless LGBTQ youth.

Finally, not all of a community's members are comfortable with or have access to personal computers. While the web has great potential to create a broader and more democratic experience (see Chapter 9), it can do so only if its users make the effort to extend its use throughout their communities to those least able to afford it.

With these caveats, today's Internet technology still creates enormous opportunities to collect relatively accurate hard data that can help a group pinpoint what it is seeking to assess. Because of its accessibility, the Internet can also allow group members to spend that much more time in the community interviewing people, including community leaders; professionals concerned with the program, population, or problem; and those most directly affected by the issue at hand (in this case, youth). In short, while people's work, school, and familial demands have diminished the amount of time they have to make thorough assessments, technology has provided them more time than was possible when Kay, Ellis, Jill, and Esperanza were beginning their assessments in the 1990s.

- *Financial costs:* While the costs of a community assessment may seem minimal for a group such as the one discussed above, there are hidden costs that a socially aware practitioner must identify as assignments are divided among a group's members. Hours spent interviewing could be hours spent at a part-time job. Travel costs related to either public transportation or car mileage (gas, oil, tolls) may be a factor. An entire day spent walking the streets of a neighborhood means food costs, even if only the cost of a slice or two of pizza. Some people, especially women, will have child-care costs, either directly financial or in cooperative arrangements that cost them extra hours later in the week. Taking time to reflect on and showing respect for the varied financial demands on different group members is one of the ways practitioners establish their legitimacy with others. It also allows every group member to honestly assess what he or she is capable of doing for the group so that the tasks at hand are reliably and responsively handled.

Taken together, the resources of time, technology, and financial costs help a group sift through the *meaningful–manageable matrix* between desired goals and available resources. Group members then can focus more clearly on the targets under assessment, the breadth of needs they will attempt to delineate, and the boundaries (whether geographic, functional, solitary, or bonded) of the community itself. After listening to the debate between Ellis and Kay that helped her sort out the matrix that could satisfy them both, Jill successfully moved the group from a discussion about youth and professionals to prospects for youth, giving the matrix a manageable, programmatic focus that pleased Kay without delineating which programs those would be. That, after all, was the meaningful part of the assessment that required input from the youth themselves, central to Ellis’s concerns.

Thus, the meaningful–manageable matrix is the sifting tool a group uses to handle its first practice dilemma: Too broad a focus, and they can’t get anything done; too narrow, and it may not matter what happens. The prod for *concrete specificity* also helps a group get to work. Given limited time, how big a community are we looking at? What can we learn from data sources on the Internet, and what must be learned from direct contact with others? And who is a reliable informant? That professional who runs an after-school program has credibility, but will she admit to gaps in service? That young person can speak openly about his own needs, but does he know what others his age care about? How much time and expense can a group afford to invest in making certain its members are meeting people who are truly reflective of the community they are assessing?

### GROUP EXERCISE: MOVING FROM PROBLEM ANALYSIS TO FELT NEED

In groups of at least three people, list a series of problems in a community you all live in or are a part of (it could be your school community as well):

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Now, as much as possible, identify the sources of these problems. Put a check mark by any source that seems a target capable of change:

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Clarify which issues seem to be more visible and realistic targets for change:

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Which item seems to combine a “wrong to correct” and a “right to make better” that would result in a *felt need* that could become a campaign emphasis?

### **THE STORM BEFORE THE LULL: ASSESSING NEEDS VERSUS STRENGTHS, OPPRESSION VERSUS OPPORTUNITY, AND THE EXPERTISE OF PROFESSIONALS VERSUS THE VOICE OF THE PEOPLE**

As any experienced group worker or community organizer knows, groups often erupt along harsh battle lines as members must decide not only what they want to do but also how they want to do it (Middleman & Wood, 1989; Salmon & Kurland, 1995). Ellis and Kay’s group was no different.

#### **A GROUP STRUGGLES TO GROW**

“So listen, you two, could we argue a little less here?” Esperanza was looking directly at Ellis and Kay. “We have some hard decisions to make and I’d like to get home and make dinner before 7 p.m. So . . . which part of Harlem? There are a million people in the whole community. So what makes sense? And prospects for youth about what? Employment? Education? Health? And which youth? Youth 13 to 17? Youth 17 to 21? And how are we going to find them and the people who work with them?” Esperanza’s voice took on a slight edge of frustration as more and more questions emerged. She looked at her watch and sighed heavily.

“Ellis already gave us an option with his data. Why not just look at Central Harlem? That seems big enough to matter, but it’s not the whole huge community,” Kay spoke quickly in response. “My task force list has about eight agencies right there.”

“Um . . . I like the idea of Central Harlem, Esperanza. We could handle that, and it still is, well, you know,” Ellis smiled, “central to the community. What goes on here affects the rest of the community.” Everyone smiled. Ellis and Kay had finally agreed on something!

Kay went on quickly. “I heard from my supervisor that these groups are doing some excellent work with those new after-school programs. I know we could talk to them about what they’re doing. I’d love to see what’s working so we could pass it on to others.”

*(Continued)*

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Ellis quickly jumped in, the irritation back in his voice. "Excuse me, but before we go to how cool things are, could we examine the actual conditions on these data sheets and compare them elsewhere? I mean, yeah, people can do nice work, but what if that work has been compromised by underfunding? Let's make a little comparison between Central Harlem and the Upper East Side District on the same programs. I will bet you 2 to 1 that we're underfunded up here, even though the need is greater!"

"Come on Ellis, don't we have enough to do on this project? I'm sure the after-school people can tell us their resource issues. After all, they know . . ."

Ellis quickly interrupted. "There you go again, trusting what a few professionals say, making it easier on us by avoiding reality. I am *certain* that a little historical trend data will show us the kind of discrimination and oppression for these Black and Latino kids that some people don't want to admit to. Maybe making it easy on us is just a cop-out . . ."

"Hey, Ellis, I didn't say anything like that!" It was Kay's turn to interrupt, her cheeks turning red with anger. "I just said let's see what's working! Besides which, what exactly is wrong with speaking with professionals? If they work here and care about the kids, aren't they part of the community in some way, too? Or is the only good community assessment one that focuses on the victims of oppression? Couldn't people be doing something right as well? Even those professionals you think are jerks?"

The two argued for another 5 minutes, neither giving ground to the other. Finally, Jill got up and started to pack her book bag. "I'm already late to my waitressing job downtown." She looked at Kay and Ellis, her voice wavering as she spoke. "I say make a comparison. A good assessment needs trends to make sense of what's going on. So what's the big deal, Kay? And, Ellis, we're *in* social work! Do you honestly think everyone working those 12-hour days for less pay than teachers' is a sell-out? Why don't you guys just calm down and meet in the middle? My God, we're doing a community assessment here, not planning World War III! Stop making yourselves each other's enemy, okay?"

Esperanza was packing up her bags as well. "So, since you guys monopolized all the time, you get to stay here and finish this up. We've got Central Harlem. We've got these new after-school programs as our focus. So let's compare the past and talk to professionals about the present. And kids, too. Just take a breath and spend time on a work plan . . . we've only got 4 weeks to get this project done." She looked at Kay and Ellis like the mother she was as she made her last comment. "And if each of you could see the other's point of view, just a little, we'd all get the results we want. Kay, talking about the past doesn't mean we ignore good stuff in the present. Ellis, talking to professionals on what's working doesn't mean we forget about injustice." She slung her large book bag over her shoulder as she walked to the door. "Lighten up, okay? And put together sensible timelines for what we've got to do before you leave!"

Ellis and Kay looked down at their notes, embarrassed. Jill had made them see how strident they'd been. And from Esperanza, they'd seen how childish they were acting. Their arguing behind them at least for the moment, they quickly got to work.

The storming that occurred here encapsulates what inevitably occurs at some stage of a group's development as group members must make decisions on how they are going to move ahead. *In that discussion of "how" is embedded the way the core values within the assessment will be expressed.* While there are always minor variations, those arguments most often entail three distinct yet overlapping themes.

### **Needs/Strengths, Oppression/Opportunity, and the Expertise of Professionals/the Voice of the People**

As we saw with Kay and Ellis, the debate will be argued as one *versus* the other, as if the topics were dichotomized and one's choice canceled the other out. That's why the storming occurs; group members, caught in the ambiguity of a group's project formation, overemphasize what matters most to them, hoping to guarantee its place in the project. That the eventual emphasis might be an amalgam of *both* rather than *either/or* may seem obvious, but it is rare in a group's formative stage that this kind of battle does not take place (Middleman & Wood, 1989). In community assessments, such struggles are common to group life and become reflective of core strains that have existed inside the social work field for generations (Abramovitz, 1999; Blau & Abramovitz, 2007; Fisher & Karger, 1996; Jansson, 2008).

### **Needs Versus Strengths**

Twenty-five years ago, community assessments were called community needs assessments, and the focus was overwhelmingly on the problems, disparities, and deficits that could be found in some part of

1. a community's functions—economic production, distribution, consumption; socialization and social control; and participation and support (Fellin, 2000; Warren, 1987);
2. populations—youth, the elderly, LGBTQ, infants, children in foster care, and so on; or
3. structures—education, social services, transportation services, and linkages to other communities.

As Saleebey (2008) cogently argued, such a deficit focus undercuts the strengths, resiliency, and capacity of communities, especially those whose objective conditions are in part limited by conditions of economic and social oppression and social stigma.

Saleebey (2008) argued that for macro practitioners and others to focus only on needs was to further marginalize already oppressed communities and groups. By instead locating the variety of forms of resiliency, organizational capacity, and assets present in communities, this strength-oriented perspective reconfigured how one went

about analyzing the what and how of communities and their members in a resonant and powerful way that corrected the balance between actual needs and the capacity of a community to meet them.

This, of course, was the underlying point to Kay's argument. Ellis's was to guarantee that the historical and present-day realities of oppressive and discriminatory resource allocation in comparison with other communities and groups not be ignored as well. New practitioners (as Ellis and Kay were at the time) fought as hard as they did so that these core dimensions to their community assessment would be neither ignored nor trivialized. Finding a balance between awareness of discrimination and marginalization and not focusing exclusively on deficits and victimization is part of the filtering that group members do as they develop their community assessment project.

### **Oppression Versus Opportunity**

One of the longest debates among American organizers, social workers, and policy-makers concerned with poverty and social welfare relates to one's interpretations of the social conditions impacting people's lives (Blau & Abramovitz, 2007; Jansson, 2008; Reisch & Andrews, 2002). As we can see from the above case study, Ellis is acutely aware of the historic markers of oppression and discrimination that are woven into the conditions of the Harlem community's life. As such, he frames his interpretation of present-day problems within long-term and systematic issues of purposeful discrimination, economic inequality, and conscious marginalization that have long afflicted the community he is assessing (National Urban League, 2009). The identified problem—whether prospects for youth or concerns of the elderly—will always have a comparative, trend-influenced perspective so that any possible inequalities will be highlighted and appear central to eventual problem definition and proposed solutions. Actions would incorporate this principled attention to the past as work was undertaken.

Kay, on the other hand, sought out the opportunities presently at play so that their group could recommend meaningful activities that actually impacted the youth. Her focus, while not denying past injustices, centered on what could be done in the immediate present based on resources and interests of programs and the people who ran them. The problem at hand would have an immediacy and *pragmatic* attention to action based on what could benefit youth, regardless of the past.

The discussion on oppression and opportunity that macro practitioners undertake eventually gets filtered through the mix of *principles and pragmatism* common to all policy debates (Jansson, 2008), especially as they impact programmatic recommendations for a targeted group whose needs may be both large in the present and historic in the making. Kay and Ellis were arguing in ways familiar to almost all groups as practitioners refine their assessments to be both principled and pragmatic in their analysis of social problems and what they propose to do about them (Alinsky, 1989a, 1989b).



## Professional Expertise Versus the Voice of the People

Ellis and Kay also argued over the *key community informants*—that is, who was most credible in evaluating the needs and assets of the community under review. Any assessment must have *reliable* informants, people whose answers to your questions accurately portray the program, population, or issue for an entire group of people and not just from their own points of view. Likewise, community respondents' answers on trends, problems, and assets must also have a high degree of validity; what they say must carry the authority of soundness and thoroughness regarding the issue at hand. Ellis's desire to hear from young people reflected his belief in the validity of their experience, regardless of whether it could be generalized beyond themselves. In turn, Kay wanted the reliability offered by professionals' wider scope, even though such scope may extend beyond their programmatic interests.

This kind of tension between professional experience and community member voice extends back more than 50 years in social work, as seen in the profession's Code of Ethics (National Association of Social Workers, 2009). As such, this issue is resolved not with an either/or answer but through the mix of both sets of representatives in one's assessment. Esperanza and Jill forced Kay and Ellis to compromise on an age-old problem of the field so they could complete the course assignment. Selecting the mix of community members and professionals to interview in your own community assessment—all fit within the mix of principles and pragmatism that drive any good community project—will be part of the sifting process that you and your group undertake as well.

At the conclusion of this chapter, there is a topical outline from the Community Toolbox on the specific steps and tools you can use for your own community assessment. While we continue to frame the broader strategic issues at hand that impact your practice choices—and your career options—you are invited to use the outline and assess the rich material from the webpage for the step-by-step tools you will need as your projects unfold.

### EXERCISE: CREATING A MEANINGFUL-MANAGEABLE MIX

Choose a campaign you or your agency is involved in: \_\_\_\_\_

Outline what and who the campaign is attempting to influence and change in terms of

Needs/strengths:

---

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(Continued)

(Continued)

Oppression/opportunities:

\_\_\_\_\_

\_\_\_\_\_

Professional expertise/member voice:

\_\_\_\_\_

\_\_\_\_\_

How could the campaign be made more manageable?

\_\_\_\_\_

\_\_\_\_\_

More meaningful?

\_\_\_\_\_

\_\_\_\_\_

**THE FIRST STEPS IN YOUR *PERSONAL* DEVELOPMENT  
OF YOUR *PROFESSIONAL* BEST PRACTICES: MAKING TACTICAL  
CHOICES . . . AND STRATEGICALLY LIVING WITH THEM**

The arguments under way between Ellis and Kay at surface level are about the kinds of tactical choices their group needs to make to get the assignment done: Who do we talk with? Who matters? What are the boundaries of the community we are assessing? Too small and modest? Too big and vague? How much of the past do we compare to the present? How much do we focus on the programs as they are today? As such, these choices are powerfully reflective of the general strategic direction a group will take as its project unfolds. Those are the *professional judgments* of you and the people with whom you work about what you seek to accomplish.

That said, how you respond to different tactical choices in your work is part of your *personal and professional development* into a great practitioner as well. Underlying Kay

and Ellis's arguments is something beyond professional strategic judgment. *There is also the personal fear that what matters to one will be ignored, left out, or trivialized by the other, especially after the group has made its tactical choices on how to mix the amount of focus on oppression/opportunity, needs/strengths, and expertise/voice.* Kay and Ellis are not only arguing; they are also in the beginning stages of their own professional development in living with the choices a group makes that may not totally reflect their own values, beliefs, and personal comfort.

Best practice in macro work is not only about the choices you make in the meaningful–manageable matrix of your project; it is your personal capacity to live within that mix once choices are made. Kay needs to toughen up and pay attention to larger social conditions and dynamics of oppression. Ellis needs to lighten up and allow that not every social work program is a source of control and marginalization of the people he cares about. One's ability to work on the choices a group makes *and* the dilemmas created by the inevitable limits that such choices create is a personal challenge that anyone committed to a life of meaningful social change and social justice must undertake throughout his or her career. It is, in many ways, the kind of “micro” intrapersonal issue that clinical social workers easily embrace and many macro practitioners find more difficult.

Happily, there is also a paradox embedded in this personal and professional challenge that any practitioner can embrace: The more you are able to handle your tactical choices and their limits, the more likely you will begin to embody the qualities of openness, flexibility, and humility that are at the core of Paulo Freire's (2000) charge to practitioners who seek to work with the oppressed:

Dialogue [the ongoing, reciprocal work done among macro practitioners and community members] cannot exist without humility. The naming of the world, through which people constantly re-create that world, cannot be an act of arrogance. Dialogue, as the encounter of those addressed to the common task of learning and acting, is broken if the parties (or one of them) lack humility. How can I dialogue if I always project ignorance onto others and never perceive my own? How can I dialogue if I regard myself as a case apart from others? . . . How can I dialogue if I consider myself a member of the in-group of “pure” men, the owners of truth and knowledge for whom all non-members are “these people”? . . . Someone who cannot acknowledge himself to be as mortal as everyone else still has a long way to go to be at the point of encounter [with those with whom he works]. (p. 90)

Through one's personal capacity to admit to limits, one's professional capacity to transform the way one works with others becomes more, not less, powerful. Of course, seeing limits as opportunities for growth is an enormous paradox as well: *How can one have the courage to try to change the world and be humble at the same time?*

## **LEARNING TO GROW PROFESSIONALLY THROUGH “LESS IS MORE”: THE DEVELOPMENT OF TACTICAL SELF-AWARENESS**

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This is where the development of tactical self-awareness can make a difference. As we can see from the early struggles between Ellis and Kay, some of their disagreements stemmed from the different ways they approached problem solving early in their group’s development. Ellis wanted to get down to work and move things along; Kay desired a chance to talk things through and to check in with each other before getting down to the rest of the work. Their differences in pace (one fast, one more measured) and focus of interest (one on task, one on process) are reflective of key dimensions to one of the profession’s key domains: *the conscious use of self*.

However, “use of self” has been written about primarily for caseworkers, where transference and countertransference issues are endemic to practice (Maguire, 2001). The social caseworker uses available tools to minimize long-term problems created by such intrapsychic phenomena: Regular clinical supervision, knowledge of cultural and social psychological differences, the spatial limits of an office, and the temporal limits of 45-minute (or less) sessions are all used to maintain practice effectiveness. Such aids help the caseworker and the client overcome what are otherwise emotionally charged problems within the therapeutic process.

Few of these aids exist for the community practitioner. He or she works with varying numbers of people in rarely neutral settings, often at irregular hours. Supervision, when it exists, is structured around the political and strategic concerns of the group. Furthermore, many community practitioners (like Ellis) are predisposed to mistrust the presumably “gloppy” process interests of case and group workers: The task is everything, and the process, if it matters, is a concern for leadership development, not for personal issues related to oneself. Anything else is just talk.

The reality, of course, is that community practitioners, whether organizers or managers, are as much engaged in process as any clinical worker is. As we can see through Ellis and Kay’s arguments, the emotional strains are certainly as intense. This is why, in part, so many organizers leave community organizing after a few years—not because the work is finished but because they are too exhausted, personally, to continue. Instead of the experience being a mellowing process, as Perlman (1989) called long-term professional work, it becomes a justification for exhaustion. The result is that many social work agencies and communities lose some of their most skilled professionals just when they could be of most service (Maguire, 2001).

One of the ways organizers can avoid burning out is through a different appreciation of the use of self, using an approach that looks at personal issues in terms of the community organizing experience, drawing on both casework and community organizing literature to create a viable methodology—one that actively incorporates the self into the socially and politically tumultuous world of organizing. What follows is an attempt to do just that.

## A CASE EXAMPLE OF THE PERSON IN THE ORGANIZING PROCESS

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An example of how an individual's personal makeup affects the organizing process occurred during a legislative session where social workers were intently lobbying for their issues. A young organizer was speaking with me about her lobbying efforts on food stamp legislation. It was a complex and exciting task, one she relished. If passed, the new procedural guidelines would have tremendous impact on thousands of people. The vote was expected to be close, but she looked forward to the effort, complete with arm twisting, late-night negotiations, and constant haggling as the vote drew close. Later in the conversation, we happened to speak about casework, and she visibly cringed when I suggested she also might like being a caseworker. "Never! I haven't the right to do that kind of work—there's too much power over the individual. I'd never do it." When I mentioned that she seemed to relish the power at the legislative level, which could affect thousands of people, her consternation grew. "But there's a difference—one's individual, the other's collective. I want to help communities, not just one person." She and Ellis have a lot in common.

As she later admitted, however, her initial response to my query had been personally, not politically, based. While she still felt politically correct in choosing organizing over casework, part of her justification had centered on her discomfort with intense personal interaction. Unfortunately, the blanket political justification also had diminished her effectiveness as an organizer. Personality is not destiny, but since *people* implement strategy, one's own personal understanding becomes tactically necessary. This otherwise effective organizer later found herself limited in her arm-twisting techniques. She was highly effective when working in groups, but lobbying's one-on-one interaction left her awkwardly inarticulate. If she had been more aware of this personal limitation, her ensuing difficulties, repeated throughout the legislative session, might have diminished.

## THE INTROSPECTIVE CUTTING EDGE OF ORGANIZING

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As the above example suggests, the introspective cutting edge of organizing is neither a political nor a personal issue but one of *tactical self-awareness*: How aware are you of your personal skills in the array of organizing settings that you are part of daily? Can you distinguish between objective and personal limits? Did that important contact at the fundraiser turn you down because her funds were already committed or because your own discomfort in social situations dampened her interest in your organization? Did the plans for the large rally fall apart because people truly weren't interested or because, like Kay, you don't have the necessary attentiveness for the minor details beforehand?

There are no easy answers, but the rest of this chapter will focus on how heightened tactical self-awareness can increase one's organizing effectiveness.<sup>1</sup> As we will see, the community assessment group's struggles to create an effective plan of action would have been diminished had Ellis and Kay been developing their own tactical self-awareness of the organizing situation at hand.

The term *tactical self-awareness* has been chosen carefully, for the phrase emphasizes both personal temperament regarding one's preferred approaches to problem solving and the specific organizing techniques required at that strategic phase of the group's development.<sup>2</sup> Tactical self-awareness, with attention to both one's personal and political skills, is an extension of the relationship Saul Alinsky (1989b) discussed in his classic *Rules for Radicals*. In analyzing the failure of some organizers to grow beyond a certain elementary level of skill, he stated:

[Those who failed] memorized the words and related experience and concepts. Listening to them was like listening to a tape playing back my presentation word-for-word. . . . The problem . . . was their failure to understand that a specific situation is significant only in its relationship to and its illumination of a general concept. Instead they see the specific action as a terminal point. They fail to grasp the fact that no situation ever repeats itself, that no tactic can be precisely the same. (p. 23)

However, Alinsky (1989b) was stating only that tactics are different in each new situation. An individual is different, too, with distinct emotional and personal responses to the event, its participants, and the host of tactical considerations evoked by each strategic context. If each new strategic situation demands a fresh look at tactics, it also needs a quick reappraisal of the people involved in implementing them . . . including oneself.

The basic assumption of tactical self-awareness, by emphasizing simultaneous personal and tactical changes in varying contexts, opposes the Great Organizer Theory of Organizing. This theory (and one that almost every organizer has succumbed to at times) goes like this: *Every organizer should be able to perform well within all important strategic situations, from running the office (the autonomous, neat, punctual organizer, like Jill) to running the demonstration (the collective, spontaneous, charismatic organizer, similar to Kay)*. Furthermore, anyone who can't perform all these tasks should seriously consider a different profession.

A number of organizers have taken up this alternative job consideration after reading Alinsky's (1989b) list items:

While idealized, the best organizers should have all of them to a strong extent, and any organizer needs at least a degree of each: (1) curiosity; (2) irreverence; (3) imagination; (4) a sense of humor; (5) a bit of a blurred vision of a better world; (6) an organized, rational personality; (7) a well-integrated political schizoid; (8) a strong ego; (9) a free and open mind. (p. 46)<sup>3</sup>

Alinsky (1989a, 1989b), always the provocative tactician, undoubtedly wrote this list with an eye toward some of the smug younger organizers of the late '60s. However, anyone who reads this list, whether grayish '60s activist or 21st century third-wave feminist, will feel understandably defeated. For example, after my own reading, I proceeded to eliminate everyone I knew from the “best” category, and only a few squeaked into Alinsky’s “any organizer” slot. Yet, as I mused on the list while continuing my organizing, I realized something was missing in his analysis. At times, such as during large demonstrations, I was a terrific organizer: I functioned well, spoke clearly, got along with everybody, and even digested my food with ease. At other times, doing routine office work, I was a klutz—about as effective as an Adam Sandler character on a blind date, without the humor. Did this mean I was only half an organizer, half effective?

All organizers will ask the same thing, particularly after certain organizing problems recur. If the problem is strictly tactical, they can find suitable political alternatives. For example, you don’t wage a petition campaign when people can’t decide what the problem is, nor do you attack the landlord when the rest of the group still likes him. That’s simple enough and fits the general guidelines Alinsky (1989a) was writing about. Ellis calmed down and got to work on the assessment when Esperanza pointed out to him the group’s need for a clear purpose before getting started. Most organizers learn this within 6 months.

But *real* organizing, the day-to-day, garden variety of three-person meetings, bungled conference calls because someone forgot the number, gulped lunches, overlooked details, and late-night, laughter-filled drinks at the bar, isn’t easily fit into abstract strategic formulas. *In reality, an organizer is engaged in the implementation of tactics every day and thus is an embodiment, personally, of the tactics themselves.* If some of those situations are personally discomfoting, the tactic won’t be as effective as it might otherwise be. Kay was bothered by Ellis’s pushiness. Ellis grew irritated with Kay’s desire for check-ins. The objective for a community practitioner is to learn how to work with whatever form of discomfort you feel in ways that minimize potential organizing problems in the future.

The young woman working on food stamp legislation, discussed above, had just this type of problem. In her discomfort with direct, individualized interaction that had potential conflict, she presented the bill so poorly in her one-on-one meetings that a few moderately sympathetic legislators began to suspect both her and her program. Yet later that night at a group strategy session, the organizer could skillfully synthesize different bits of political information on how votes were lining up, and her final presentation was instrumental in charting the next day’s lobbying efforts.

In fact, she was no different from any other practitioner. Equally important, her choice of *tactics* in the lobbying situation had been correct. The failings were her personal inhibitions in highly specified organizing activities, inhibitions she could have predicted beforehand. She had functioned not as a heroine but as a human—good in some areas, a little shakier in others.

**REFLECTIVE QUESTION**

What is the key distinction between *professional use of self* and *tactical self-awareness* for the community-based practitioner?

### **A PRACTITIONER'S SEARCH FOR INTERNAL BALANCE IN THE MIDST OF AN ORGANIZER'S AMBIGUOUS WORK**

Organizers can begin to become more tactically self-aware by recognizing, rumors to the contrary, that they are just like other people in their varying effectiveness at work. In doing so, community practitioners can become much more open to the subjective concerns of psychologists and clinical social workers. One helpful role model is Carl Rogers (1980), who years ago developed a series of still-popular propositions related to personality development that explain some of the subjective reasons for one's constantly shifting tactical effectiveness. While written for a different audience, the propositions (based on years of research) are still illuminating:

1. A [person] reacts to the field [environment] as it is experienced. This perceptual field is, for the individual, reality.
2. The [person] has one basic tendency and striving—to actualize, maintain, and enhance [himself or herself].
3. Behavior is basically the goal-directed attempts of the [person] to satisfy its needs as experienced in the field as it is perceived.
4. Emotion accompanies and facilitates such goal-directed behavior.
5. Any experience that is inconsistent with the organization or structure of self may be perceived as a threat, and the more of these perceptions there are, the *more rigidly the self-structure is organized to maintain itself* (italics added).
6. Under certain conditions, involving complete absence of any threat to self-structure, experiences that are inconsistent with it may be perceived and examined and the structure of the self revised to assimilate and include such experiences. (pp. 115–116)

Later, we will return to the last point with its element of active, personal change. Rogers's (1980) first four propositions underscore the point that a person's behavior is always a response to his or her existing need to experience reality in a way that allows him or her to be comfortable with both the environment and his or her sense of fit in that



reality. Second, Proposition 5 makes clear that when one's environment is in some way personally threatening, it is natural to become defensive (consciously or otherwise) and thus *rigidly responsive* (tactically less effective) to the surrounding world. In other words, the self (emotions and all) is personally mobilized to maintain its perception of a safe environment, even if political/organizational concerns and tactical flexibility suffer as a consequence (Shriever, 2003).

To use a concrete example, it was neither accident nor political inconsistency that the food stamp organizer was tongue-tied in individual confrontation and yet skillful in group interaction. Her personal makeup, complete with its own history, emotions, and behaviors, made her better able to actualize her entire range of skills in one situation (the group) and less able in another (one-to-one). Without attempting psychoanalysis, we can see from Rogers's (1980) formulation that, in the particular context of individual conflict, what was going on beneath the organizer's awkwardness had served not a political but a personal purpose—engaged, individual conflict had been avoided effectively.

Strategically, if organizers can view their personalities as being as potentially variable as any other tactic, they are freer to adapt their personal attributes to particular situations, letting others perform in those more difficult contexts or, if that's not possible, building recognizable supports so that tactical problems are minimized.<sup>4</sup> Rather than berating yourself for being a lousy organizer because you can't do well in, for instance, social situations where important contacts can be improved, a little tactical self-awareness frees you to more easily use other abilities in a more dynamic and personally liberating manner. You're not so hot on social contacts? How about your colleague, who is as gregarious as he is disorganized on follow-up? Let him have the main tasks at the social function, and you can handle the later phone calls. By affirming your strengths and admitting to limits, you humbly begin to open yourself up to the tactical flexibility great practice requires.

### **TACTICAL SELF-AWARENESS WITH THE TASK-ORIENTED PRACTITIONER**

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The awareness of how personal effectiveness varies from situation to situation is important for all practitioners to consider, but perhaps even more so for organizers, for most tend to identify themselves as task-oriented rather than process-oriented personalities. Indeed, in brief surveys with about 100 student organizers and 30 practicing organizers, it was found that more than 70% considered themselves task oriented—the type of people who focus on the actual work, are disinterested in the procedures of how the work is done, worry mostly about outcomes, and devalue social interaction over goal achievement.<sup>5</sup> This orientation thus tends to ignore an organizing project's demands for a longer-term, more

open-ended practice when it comes to group engagement, leadership development, and reflection on what's working and not working. Being task oriented is helpful, of course, especially as a group gropes toward understanding what it can accomplish, needs to take risks on new ways of working, and has to meet deadlines.

To look at the implications from Rogers's (1980) work again, one can see that the more a person views reality as time limited and sharply focused in its demands, the more he or she will emphasize task-oriented, impersonal, concrete roles and actions. Furthermore, one can thus correctly screen out more personally intense, emotional concerns. ("Cut out all that talk-talk-talk!" Ellis cried. "We have work to do!") To have a longer-term or more relational focus, with its heightened interpersonal complexity and variability in the process itself, would greatly increase the emphasis on intuitive, personalized situations. It is equally likely, of course, that the personal discomfort of the task-oriented practitioner would increase in such situations as well.

Task orientation, then, is not "the right way to organize"; it is simply the adaptive style of most organizers. As stated before, it is often helpful. However, *organizers need to learn that one's personal strength in some aspects of practice is not the same as an immutable law of how things must get done*. The daily life of an organizer touches on innumerable events that demand a more subtle mix in one's perspective. Indeed, most organizers go through enough tactical variation in a week to touch on almost every type of strategic situation—individual discussions, group meetings, social events, and so forth. The following case example, analyzed in detail, helps explain what can happen to a task-oriented practitioner when he or she does not account for personal dynamics in certain organizing situations.

An organizer, working in a poor neighborhood of a large city, was having his first large meeting of concerned community members. They had gathered to discuss local problems, and the organizer, a solidly task-oriented person, was actively trying to find out the main problems people wanted action on. People had been discussing both personal and community issues, and the meeting was about an hour old. The following narrative took place:

- Organizer:** We've been talking about a number of things tonight, and we ought to start listing ones that people feel are the most important. Who'd like to start?
- Mr. O (immediately):** Where the smell's from . . . the sewers.
- Organizer:** Any other problems that ought to be discussed?
- Mr. F:** Well, what we need are some stop signs around here. We should have a stoplight on the corner so the kids don't get hurt.

**Organizer** (looking around somewhat blindly): What would you call that? (*There was silence, and finally someone said, "Safety."*)

(*People in general were looking at the organizer somewhat strangely. After a brief pause, Mr. M. brought up the topic of the streetlights again. A wider, informal discussion then ensued in the group.*)

**Organizer** (interrupting the informal discussion): Okay, we've got recreation because somebody mentioned parks for the kids. Are there any other problems in the area worth looking into?

**Mr. P.:** Garbage collection.

**Organizer:** Let's see now, we've got the garbage collection, and the sewers. Now what would you call that? (*Again, people looked at him oddly.*)

**Organizer** (continuing): Could we call it sanitation? (*There was no reply for a time and then some brief nodding.*)

(*The meeting broke up soon afterward with a small committee formed. It never functioned.*)

The first and most obvious criticism one could make about the organizer's performance was that his needless use of abstract categorization around concrete issues only confused people—his educated class bias was showing. *There is only one problem with this criticism: The organizer almost never spoke like that anywhere else.* Given his desire to be effective, his previously demonstrated talents, and his generally concrete approach to work, what happened?

The answer is simple. Working in a new group of predominantly poor people had not only excited him but also made him nervous with anticipation. That nervousness manifested itself not in hemming and hawing but in heightening the specific, categorical, and abstract clarity of each and every topic. *Such obsessive categorization may have been dysfunctional tactically, but not personally.* Its abstract unity was the evening's closest approximation to satisfying the practitioner's own personal need for some concrete, *organized* success.

His behavior had helped resolve the underlying nervousness he felt in the new and exciting situation; it may have been unnecessary, but his own *personal* fit with the amorphous context was better for the effort. As Rogers (1980) would say (in Proposition 5): "Any experience which is inconsistent with the organization or structure of self may be perceived as a threat, and the more of these perceptions there are, the more rigidly the self-structure is organized to maintain itself" (p. 218). Or, as the organizer later put it, "I grabbed at something to calm me down."

## ORGANIZING SITUATIONS AND THEIR DOMINANT PERSONALITY DEMANDS

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It might be helpful here to look at the variety of situations in which organizers eventually find themselves. While the variations on each category are endless (the social, informal party may be used for fundraising when a valued financial contact unexpectedly appears, day-to-day routines may be upset by anything from a fire to a firing), the typology in Table 3.1 is based on interviews with experienced organizers regarding their most common situations, the kind that you inevitably will be called on to respond to, whether you like it or not. In general, they range from the informal and social (with an emphasis on interpersonal, process skills) to planning activities, with their greater demands for intellectual, task-oriented abilities. Each naturally carries certain types of personal difficulty to match its strengths.

The dominant positive and negative characteristics in these organizing situations were selected by organizers in an informal survey over a 2-year period. (Done yearly since then, the results have not varied in more than 30 years.) They are meant not to be exclusive but to serve as aids in helping organizers better examine their own personal effectiveness throughout the organizing situations in which they will find themselves.

In general, people identify themselves in either the more personal, intuitively demanding situations (informal parties, new meetings, interpersonal routines), as Kay does, or the more intellectually precise situations (office routines, formal meetings, ongoing group activity), as Ellis does.<sup>6</sup> This is consistent with industrial psychologists' findings on other people's problem-solving abilities, either task or process oriented. These situations are as follows:

- *Informal gathering:* Parties, social events, late-night bar conversations after a meeting; these events are common to community development, social action, and labor organizing strategies. People want to know with whom they are working, at least a little, and task-oriented, intellectually intense organizers like Ellis most frequently have difficulty here as they feel there's nothing worth talking about, it wastes valuable time, and so forth. Others use this time quite profitably—and can have fun in the bargain!

- *New meeting of an open-ended group:* Most common in community development strategies, but always part of any unfolding strategy or campaign, new meetings are a time when people explore common problems, present themselves to the group, check out who is in attendance, and generally talk a lot. They want to leave with some sense of purpose and not be either too overwhelmed by the tasks ahead or distrustful of the group's approach. An intense, outcome-focused organizer can often push the group too fast or overwhelm them with detail; others, who are more process oriented, may forget to show any results from the meeting. But if you establish a modest goal beforehand and use helpful structural reminders to allow the group to cohere (have a coffee break, include notes

Table 3.1 Organizing Situations and Their Dominant Personality Demands

High Process Oriented (Personal)		More Intuitive	More Intellectual	High Task Oriented (Impersonal)	
<i>Informal party</i>	<i>New meeting (informal group)</i>	<i>Individual day-to-day work</i>	<i>Formal gathering (competing reference groups)</i>	<i>Ongoing planning group</i>	<i>Militant demonstration</i>
<b>Most Common Personal Strength in Above Settings</b>					
Sociable, cooperative, talkative, good-natured, efficient	A. <i>Office routine:</i> Tidy, persevering	Ideological clarity, formal poise		Technical, analytical expertise	Adventurous, headstrong
	B. <i>Interpersonal routine:</i> Responsible, personal, verbally clear				
<b>Most Common Personal Difficulties in Above Settings</b>					
Avoidance of personal engagement	Pushes group too fast, overloads content	A. Sloppy, forgetful, inefficient	Role conflicts, role strain	Overfocused, overidentification within group	Fear of conflict, overreaction to conflict (heightened anger)
Awkwardness, discomfort in nonintellectual tasks	Overstates future outcomes	B. Forgetful, inefficient in conversation, too much formality/informality			

to yourself on your copy of the agenda about relaxing), new meetings end up being less anxiety provoking than often expected.

- *Day-to-day office routine:* No organized group does anything if it doesn't maintain its operations. Everyone knows that. However, knowing that and becoming efficient are two very different things for organizers who prefer a little more personal contact or excitement every day. Others, like Jill, perform extremely well here and are valuable in their ability to pay the bills on time, keep prompt schedules, and so on. One common technique for those seeking to become more efficient is to ask their tidier friends for helpful hints. (This has been an area of great difficulty for me all my life. By taking some concrete hints from colleagues on how to use lists, how to build up an easy filing system, and so on, I've made some progress over the years. Some.)

- *Interpersonal routines:* These are all the phone calls, brief chats, short lunches, and street raps that an organizer engages in every day of the week to follow up with individuals. They call for some efficient skills in one's office work but are intuitively demanding as well. Some organizers hate the phone or prefer political discussions to personal matters; they may end up being too brusque. Others, in their anxiety to please, may have a delightful conversation, only later realizing they forgot the reason they called in the first place. Either case demands you follow two simple rules: (a) Remember why you contacted the person by writing it down somewhere (the act of writing increases retentiveness). (b) Remember that people are human, and allow for personal issues to be raised without viewing it as diversionary (if you have to, write that down, too!). The use of tactical self-awareness is important here, where the lack of formalized meetings or events minimizes the use of other, more structural supports.

- *Formal gathering (competing or conflicting reference groups):* These are formal, occasional events in one's work—cocktail parties before important conventions or conferences, obligatory organizational functions (forums, conferences), and coalitions. They most often involve social action and social planning strategies and create role strain because their surface functions and their underlying purposes may be either unclear or problematic. (Two competing groups may be equally attractive in meetings. How do you decide?) Those who are uncomfortable with such political ambiguity and/or uncertain how they and their organizations fit in with such situations have difficulty here. Only by being thoroughly prepared, especially about one's own positions, can an organizer expect to be comfortable.

- *Ongoing planning group:* Once an organization has established itself (especially in social planning and community development strategies), ongoing group meetings are necessary to coordinate work, share information, and analyze progress. Real intellectual analysis may matter here, where someone like Ellis can shine. What can develop, however, are common forms of goal displacement; one must stay attuned to other, less visible concerns or face the possibility of overspecialization and ignorance about newly developing organizational or community issues. Making certain that someone is responsible for maintaining and extending the group's outreach work is an obvious structural solution, but individuals over time can also train themselves to be more intuitively responsive to new issues as they develop.

- *Militant demonstration:* Used in community development, social action, and labor organizing strategies, militant actions can be exciting and effective galvanizers to even

greater commitment and success. For those who shy away from conflict, they also can be frightening experiences. I have also seen people become too excited, using the emotionally charged event to ventilate an unrelated, deep anger. As such events are so public, it is important that organizers and their coworkers select their roles carefully, allowing more verbally confident and gregarious types to perform the publicly expressive roles while others handle the demonstration's order and safety. This minimizes both personal difficulties and potentially embarrassing public miscues.

## THE STEPS TOWARD DEVELOPING TACTICAL SELF-AWARENESS

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By identifying one's personal comfort in the above organizing situations, the organizer can begin to structure ways to improve performance in areas of lesser effectiveness while maintaining strengths. The structure you develop should emphasize two operational principles:

1. **Be modest in your personal goals.** Everyone knows you're supposed to work with groups in a way that does not build false expectations, the type that either can never be met or are so grandiose that solid achievements appear worthless. And so it is with oneself. You haven't efficiently organized the office's routines over the past month? Instead of berating yourself over the failure, start organizing your appointment book for the next week. By being modest, you have a chance at success that can spur you on to even larger tasks. (If you like, think of this process as community development for one!)

2. **Actively use your personal strengths to work on areas of difficulty.** No person is exclusively process or task oriented, and few situations are, either. You're uncomfortable at parties? Why not tend bar or help serve food? This more focused task will fit your own personal makeup better and creates enough work to help you relax a bit. One can reverse the content if the difficult situation relates to task-oriented groups. By being both modest and aware of how to use your strengths in every situation, you can and will effect personal change.

An organizer can then begin using the organizing process in ways that help him or her lessen particular errors of the past. Increased effectiveness, rather than being viewed as art or just experience, is respected as a deepened ability to combine one's intuitive and intellectual skills in ways that help differentiate the political and personal elements of the organizing process.

A brief example of this process would probably look like the following:

- As a good organizer, you make some tactical mistakes (and good organizers are *always* making mistakes) at some organizing event. (Choose your most challenging type of event from Table 3.1.)
- Recognizing your mistakes, you go home and for the rest of the evening berate yourself for being such a colossal failure.

- After a while, fatigue sets in and some of the self-hatred instilled by “great organizer” theories begins to wear off. The tactically self-aware practitioner can now use this slight distance from the situation to analyze what happened. Ask yourself the following questions:
  - Where and when was I effective?
  - When did people respond well, and when did I get results?
  - What was I doing, specifically, that seemed to excite or irritate people?
  - Was the problem in my implementation, or were there hidden agendas floating around?
- As you explore these answers through both introspection and later talks with others, a sifting process occurs, one that allows you to recognize strategic mistakes, others’ hang-ups, and your own personal inflexibility.
- Away from the context of the actual work, you, a tactically self-aware organizer, begin to integrate new elements into your behavior, allowing yourself to have a few structural supports in future situations so that overall tactical effectiveness is maintained.

Or, as Rogers (1980) put it in more theoretical language (Proposition 6):

*Under certain conditions, involving primarily complete absence of any threat to the self-structure, experiences which are inconsistent with it may be perceived and examined and the structure of the self revised to assimilate and include such experiences.* (pp. 67–68)

**REFLECTIVE ACTIVITY FOR EDUCATIONAL  
"POLICY 2.1.1: BUILDING TACTICAL  
"SELF-AWARENESS**

Choose an event that had success and struggles for you, too:

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What worked well for you?

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What did not go as well?

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On reflection, which part of the problem related to your tactical inflexibility?

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Is there a way you can use your tactical strengths as a support within this situation?

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What other preplanning supports can you use with others in the future?

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Although Rogers (1980) was discussing therapeutic issues, the process related to tactical self-awareness isn't really much different. Such introspection and reflective work may not be easy, but one's willingness both to engage in personal introspection and to use tactical supports in personally challenging organizing situations can help move one, over time, from a mechanistic application of tactics to a more fluid use of self in any variety of strategic contexts. Thus, the next time a similar situation occurs, you free yourself from personally discomforting tasks by taking different assignments—or, if that's not possible, giving yourself structural cues to ease the situation (notes on your agenda, etc.).

*There always will be moments of greater and lesser success, of course, but the application of tactical self-awareness over time uses experience as a tool for ongoing learning and not as a static "artistic" place where old organizers someday arrive by accident.* This is why task-oriented organizers can grow to work well with individuals and highly process-oriented caseworkers can learn to handle large political groups. Neither type of individual has been born with certain irrevocable work styles. Each practitioner is made, again and again, by both contextual and environmental demands and his or her willingness to engage personally in further understanding those demands as they change.

With experience, you can extend your use of this introspective tool beyond your own personal growth and increased tactical effectiveness. Looking at yourself means increasing your willingness to look at others, too, and helping judge their personal fit in different situations. Nancy Wehle's recollection in *The Other Side of Organizing* (Burghardt, 1982) is still apt today. An organizer doing liaison work in the Bronx, she recalled the following example:

I dislike confrontation. I link it to my own background that emphasized the virtues of stoicism, since confrontation involves a show of emotion, anger. I end up being very uncomfortable, even though I know confrontation is needed, and end up putting off any display until it's almost too late.

However, looking at the issue of confrontation from another perspective (otherwise known as turning a sow's ear into a silk purse), I know there are people who feel the same way I do. I've been able to connect up to their hesitancy in challenging authority. An example occurred at a senior citizen center that was in jeopardy. Their funding was about to be terminated and they had gone the route of appeals and appointments and meetings. While talking to the director of the center, I suggested picketing and a demo at downtown City Hall, if all else failed. The director became hesitant and uptight. I knew what she was talking about when she said that wasn't her style. I was able to be supportive, understanding my own discomfort in those situations. Instead, we talked about someone else taking main responsibility and she staying in the background. She agreed, and the protest march was organized successfully. (pp. 118–119)

A less experienced organizer in the same situation would probably have ended up straining relations with the director and potentially jeopardizing the strategic demands of the center. After all, the ABCs of organizing are clear regarding militancy: If all other means have been tried and have failed, of course you have a legitimate right to use it! As few politicians want to be seen openly disagreeing with a group of seniors, this joint use of militancy and rightful need might go far in saving the center.

In this case, Wehle saw through the prism of her own personal struggles with militancy to the director's real issue—*she didn't oppose staging a protest as long as she didn't have to be in it*. This personal recognition of a politically necessary tactic had not always been immediately obvious. However, by being able to identify the director's statements with her own discomfort with militancy, Wehle supportively helped the director distinguish tactically between her own personal needs and those of the center. No arguments on the legitimacy of protest, the just needs of the seniors, or anything else would have worked as well. Indeed, as the director generally agreed with those arguments, any discussion of them would have distracted her from her personal difficulties.

Wehle's use of tactical self-awareness avoided such barriers. *A sweet strategic irony had occurred—the one that underlies the effective use of tactical self-awareness in all situations: She had admitted to personal limits and allowed for political growth at the same time.*

## CONCLUSION

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Community assessments serve multiple purposes for any social work agency or grassroots campaign. As such, they are a systematic undertaking with great strategic value in helping one learn the way a community perceives a problem, what the contours of the problem are, and how to begin addressing the issue. This is also the initial level of engagement by which a practitioner begins to build trust, demonstrate respect, and frame the role he or she will be playing in the long work ahead.

As a fundamental task of engagement, such assessments also reveal a macro practitioner's degree of comfort in approaching this work: sifting data as opposed to talking with community members, analyzing a report or facilitating a focus group. Developing your tactical self-awareness on the work's mix of "process" and "task" functions can only strengthen how well that trust is built as well as how thorough and accurate your information gathered is.

It's important to reiterate that tactical self-awareness is not a panacea that can correct for the political limits of a diminished resource base or lack of wide-scale progressive social movements. Its application, however, is designed for any period of history, not just ones of seeming passivity or intense activism. With this recognized, tactical self-awareness can have one final underlying benefit. Starting with community assessment, by understanding and engaging with the entire organizing process, you not only deepen the practice experience but also lessen the likelihood of unnecessary exhaustion. As we will see in Chapters 8, 12, and 13, this self-reflective work helps prepare you to more effectively adapt to new roles, situational demands, and expectations as your career advances. Experience no longer burns you out over the years but, instead, makes you better able to deal with the shifting tides of all macro practice work. After all, in seeking to change the world, what can be wrong with changing ourselves along the way?

## THE COMMUNITY TOOLBOX

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The Community Toolbox website has a number of rich tools related to community assessments that a practitioner can take advantage of. See [http://ctb.ku.edu/en/tablecontents/chapter\\_1003.htm](http://ctb.ku.edu/en/tablecontents/chapter_1003.htm).

## Assessing Community Needs and Resources

Section 1. Developing a Plan for Identifying Local Needs and Resources

Section 2. Understanding and Describing the Community

Section 3. Conducting Public Forums and Listening Sessions

Section 4. Collecting Information About the Problem

Section 5. Analyzing Community Problems

Section 6. Conducting Focus Groups

Section 7. Conducting Needs Assessment Surveys

Section 8. Identifying Community Assets and Resources

Section 9. Developing Baseline Measures of Behavior

Section 10. Conducting Concerns Surveys

Section 11. Determining Service Utilization

Section 12. Conducting Interviews

Section 13. Conducting Surveys

Section 14. SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats

Section 15. Qualitative Methods to Assess Community Issues

Section 16. Geographic Information Systems: Tools for Community Mapping

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**NOTES**

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1. Since writing this in the early 1980s, I have learned that similar management tools have been developed and are used inside many corporate and nonprofit offices to help teams better problem-solve and communicate together. They include the DISC problem-solving series and Myers-Briggs personality assessments (Dombroski, 2000).

2. With this noted, there is no suggestion that one's personality is unchangeable—in fact, the opposite is true. As one lives through certain situations, one's personality can and will change, as will the situations themselves. It is thus necessary to be that much more aware of these changes as they occur in oneself and in others so that one can maximize *ongoing* strategic effectiveness.

3. With the exception of number 7, these points relate to personal characteristics. Point number 7, however, is a political prescription ideologically bound to a form of liberalism other organizers reject, and it should be viewed as being as politically motivated toward a particular ideology as any other political statement.

4. I am convinced that a lack of personal awareness about one's effectiveness in varying situations is a major reason why so many organizers burn out in their late 20s. Having denied or felt they had to deny personal discomfort with any number of tasks, they come to realize that the immediate payoffs in such work don't seem worth all the personal strain and opt for an entirely different line of work.

5. This is consistent with the previously mentioned DISC Profiles, especially “Drivers” and “Calculators.”

6. Interestingly enough, people who fell into either primary category frequently felt comfortable in demonstrations. However, on closer examination, their particular comfort depended on the function they selected to perform at the big event. Process-oriented people enjoyed engaging others in protest, speaking, and so forth, while others enjoyed maintaining the demonstration's safety and order (serving as marshals, being in charge of organizing speakers, etc.). The varied task and process functions of large-scale demonstrations seem to allow room for just about everybody . . . as long as they approve of the use of protest in the first place!