

From Checkers to Chess

The Strategic Development of a Community Practitioner

USING THE WHOLE CHESSBOARD

"Okay, okay, I admit it. I am excited beyond belief. And I'm terrified. And I can't believe I got the job. And I have no idea what I am doing in it . . . and . . ."

Kay playfully knocked a tin spoon against Ellis's knuckles. "Slow down, slow down, old man! First, you better only drink decaf today." They were sitting in a booth toward the back of their favorite diner, a special request made by Ellis because of his news. He'd just been offered a statewide position on a sustainable agricultural and local economic development project that involved small-town farmers, nearby poor urban communities, public and private funders, and small businesses. His job was to convince poor communities to create weekend markets for the farmers, who in turn needed to be convinced to provide technical assistance to those same neighborhoods on how to raise a few crops on their own on the small plots available.

As Ellis talked, it became clear that the vision of the director he'd be working for both excited and overwhelmed him. "I mean, this guy and the board that backs him see farming as a tool for gang prevention! And these little farmers' markets as antiracist tools! And then he even connects this small, local farming and the weekend markets I'll be organizing as part of a positive response to globalization!" Ignoring his coffee, Ellis gulped down a glass of water instead. His smiling face managed to crease with consternation as well. "I thought I knew

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organizing, but this guy takes it to a whole new level." He finished his water. "Kay, I realized in all my antiracist and youth development work, as good as I hope it's been, I've just been playing checkers. This program operates at a whole other level. This guy's playing chess."

"Checkers? Chess? You lost me," Kay sighed.

"You know what I mean. For the longest time, we both figured a good basic organizing strategy mixed a little bit of process goals in terms of empowering the kids and women we've both worked with, and then a set of tasks and objectives to get something done. We had targets to influence and all, but it was all about tactical choices on who was to speak or who we were trying to reach, not much more than that."

"Oh, come on, sure it was! I've always worked more from the empowerment, community development model that emphasized getting women into leadership as the way to change the world. You've always been into social action and fighting for power given the racism and injustice you see. Those are pretty different strategic models of how to organize, don't you think?"

Ellis looked at her for a long minute before responding. "Yeah, you're right. Different models, same commitments, different tactical choices along the way. But after working with this guy a bit, I still say we've been playing checkers. I mean, I met this guy at an antiracist forum here in the city. I'm fighting racism by confronting indifferent school principals and working with kids on their rights. He's fighting racism by selling apples and growing corn on an abandoned plot?" Ellis paused again, and then went on. "And he manages to connect all of it to how these activities together help counter global markets run by multinationals." He paused again. "I met him a whole bunch of times since, and he's rock hard in his commitments on racism, injustice, and the kind of capitalism that destroys communities rather than rebuilding them. And yet he's going about work with White farmers and Black clergy as if they've always been brothers or something, united in common purpose." This time he drank his coffee. "He told me that transformative change requires deep strategy. Like chess." Ellis looked at his friend, a wry smile on his face. "Kay, there are 64 squares on a chess board and he's playing on every one. I gotta go work with him. No more checkers for me!"

Educational Policy 2.1.5—Advance human rights and social and economic justice. This chapter delineates a framework and practices that will enable students to "recognize the global interconnections of oppression and [be] knowledgeable about theories of justice and strategies to promote human and civil rights" as they incorporate "social justice practices in organizations, institutions, and society to ensure that these basic human rights are distributed equitably and without prejudice."

INTRODUCTION: UNDERSTANDING THE BASICS OF COMMUNITY ORGANIZING STRATEGY

Ellis's excitement and worry are reflective of the growing pains every community practitioner undergoes as he or she engages in macro practice work on the front lines. An intense commitment to community change and an equally powerful desire to work with others so that such change will occur, once undertaken, quickly merge together into a dawning awareness that community organizing is as demanding and complex as it is fulfilling. To begin with, there are, as Weil, Reisch, and Ohmer (2009) note, at least eight approaches to organizing utilized by human services activists, ranging from confrontational social movements to accommodative social planning. Strategies of organizing have been offered to empower local citizens (Mondros & Wilson, 1994) and transform individual and collective values for social justice and social equity (Hanna & Robinson, 1994), and have been analyzed to explain progressive change as in the '30s and '60s and conservative change as in the '50s and '70s (Fisher, 1994, 2009). Making sense of it all so that one can make effective strategic and tactical choices is important.

As we will explore in this chapter, there are five strategic demands at play if a person seeks to grow strategically into a lifelong, effective community organizer.

1. For the practitioner new to organizing, it is important to understand the historical antecedents to the organizing strategies you are choosing to undertake. By rooting your work inside previous historical events and the choices people made then, you will gain access both to tactics that led to victory and to avoiding mistakes you might otherwise make.

2. An organizer needs to understand the various models of organizing at play within his or her community and across the profession. You need to know the strengths and limitations to these models so that your organizing strategies remain tactically supple and strategically applicable to what you and the people with whom you are working are seeking to accomplish.

3. Likewise, it is necessary to understand what, if anything, unites an organizing strategy compared with, say, a strategy for group work intervention or an individual diagnosis for the micro practitioner. You need clarity on what is going on in a community organizing intervention that distinguishes it from other methods of intervention so that it maintains its authority as a distinctive form of practice in our communities.

4. Next, if you seek a long-term career as a community organizer, over time you must deepen your own strategic sophistication as you are called on to represent your agencies and programs in increasingly larger and often more complex groups, including city-wide coalitions, national issue formations (such as on the fight against HIV-AIDS, homelessness, global configurations on economic development, the environment, immigration, etc.), and

possible political coalitions. You need to understand what distinguishes the checker game of the new activist from the chess game of the seasoned macro practitioner.

5. Finally, the longer you evolve as a community practitioner, the more likely that the dilemmas of maintaining the vision you had as a frontline grassroots practitioner will come into play. It can be a heartfelt struggle, personally and professionally, to resolve the tensions between expanding an organizing campaign's influence while stepping back from the daily person-to-person contact that so often inspired your organizing commitments in the first place. You need to see ways of resolving this dilemma so that the social justice commitments that inspired you at the beginning of your career remain in play later as well.

This chapter will examine each of the above, ending with a case study of one community organizer whose commitment to social justice, racial equity, and fairness is as central to his work today engaging in large-scale education reform efforts as it was 25 years ago when he was a young organizer campaigning for hospital workers' rights through the Healthcare Workers Union Local 1199.

THE HISTORICAL ANTECEDENTS OF COMMUNITY ORGANIZING

Reading various histories of social movements, as Rubin and Rubin (2007) point out, helps an organizer learn both patience and persistence. As they cogently relate, organizers frustrated by the pace of change learn “that while past movements faced lean days in which few joined the fight, there were frequent days of triumph and victory” (p. 218). Needing a reminder of why to stay in the struggle, reading history can help the organizer see that “bad times (of the past) can be turned to good purpose as activists create a shared history of solidarity and pride” (p. 52). When change seems far off, it can be comforting to know that other Black women consciously refused to move to the back of the bus before Rosa Parks, or that the first efforts to change the name of GRID (gay-related immune disorder) to AIDS (acquired immunodeficiency syndrome) were met with active indifference by the medical establishment (Vaid, 1996).

Likewise, history informs organizers of important tactical choices and strategic decisions from other movements—what worked and what didn't, and why. As Rubin and Rubin (2007) stated,

The now legendary disruptive tactics of organizer Saul Alinsky teach us what can be accomplished by disruptive humor. The nonviolence of Martin Luther King, Jr., makes clear that unarmed people can face billy clubs and win not only symbolic but actual victories. (p. 219)

Such lessons help an organizer determine whether present conditions are reflective of similar circumstances or require other strategic modification (Reisch, 2005).

A historical work of particular value for all organizers inside and outside of social work continues to be Fisher's (1994) *Let the People Decide*. His book thoroughly reviews the history of community organizing, starting with the antislavery movements preceding and following the Civil War; the suffrage movement; and the labor, socialist, and progressive reform movements that began in the first Industrial Revolution and continued through the Depression, finally reconfiguring first as the powerful civil rights movements of the 1960s and then as the identity-based politics of the '70s, '80s, and '90s. (See also Cox & Garvin, 2001; Rubin & Rubin, 2007; Weil, 2005.) Each chapter covers a different social movement and a different historical period, drawing out the kinds of lessons from each movement that Rubin and Rubin discussed, as mentioned above. Recent work extends this analysis as well (Weil et al., 2009).

Fisher's work brilliantly situates social work organizing/reform efforts inside the larger political and economic trends of which they are a part. For example, the community organizing of the Progressive Era at the end of the 19th century and beginning of the 20th century, when settlement houses were a preeminent model for social work reform, took place alongside the crusading socialist efforts of Eugene Debs, the rise in militant industrial unionism throughout the American working class, and the trust-busting efforts of Teddy Roosevelt. Likewise, the conservative and often racist neighborhood club movements of the 1950s are consistent with the anti-Communist McCarthyism, pro-big business ethos that prevailed in that decade. In short, the struggles for influence and strategic dominance of one period inside community organizing and social work are reflective of the same struggles under way with other economic and political actors. A hundred-plus years ago, settlement house reformers struggled for influence over conservative charitable impulses in the field in ways similar to those found among the industrial workers and their more conservative American Federation of Labor craftsmen or Teddy Roosevelt fighting the pro-Standard Oil trust politicians within the Democratic party (Fisher, 1994, 2005). Today's struggles in the profession over the rights of the poor and the voices of youth can find similar interplay with national struggles over health care reform, job creation, and the role of federal government in economic decision making.

Fisher's enormous intellectual contribution helps macro practitioners understand that their efforts are part of the dynamic historic trends of any period; their strategic choices are neither predetermined by other economic and political actors nor operating independently of them. Fisher (2001) later wrote:

Certainly issues of human agency—leadership, ideology, daily choices regarding strategy and tactics, and so forth—all play a critical role in the life of any effort, but the larger context heavily influences what choices are available, what ideology or goals are salient, and what approaches seem appropriate or likely to succeed. . . . History puts the actions and work of individuals into a larger framework, interweaving the local with the more global, the particular with broader trends, events, and developments in society. (p. 109)

His analysis can help macro practitioners reflect on trends within the 21st century, recognizing that the push–pull within the economic system and other political activities is not unlike the demanding strategic decisions and tactical choices under way within social work.

REFLECTIVE QUESTIONS



- What is the push–pull between current economic issues and how they can be solved by the White House? (More government aid? Less? More free market activity? More regulation?)
- What are the dynamics at your state level? (Are politicians seeking to cut costs? Are there lobbying groups seeking to expand support for the disadvantaged? What does the mix of influence look like?)
- Trends in macro practice? Other types of social work practice? What's happening inside agencies? Human service coalitions? What does the push–pull look like here?

COMMUNITY ORGANIZING MODELS

As Jack Rothman (2008) noted more than 40 years ago as he was developing his seminal material on community practice models in his classroom, there were different kinds of organizers who approached the same community issue in very different ways. There were the fact finders and agency collaborators who used careful documentation and collaboratively based agency coalitions to ameliorate a social problem. Their work focused on *social planning models* of macro practice. Others, stirred by the work of settlement houses and their appeals to democracy and leadership as well as modern-day empowerment efforts first led by feminists, emphasized bringing people together to solve their own problems. Their model is known as the *community or locality development model* of practice. Finally, those inspired by the civil rights and industrial trade union movements of the 1930s and 1960s looked to more ideological and conflict-laden strategies capable of fostering systemic change. These activists used social action models of community organizing.

Rothman's work has inspired generations of organizers, some of whom simply used his work to better clarify their own approaches to macro practice (Weil, 2005) and others who built on his approach from a feminist perspective (Hyde, 2008; Smock, 2003). As such, his rubric helped others differentiate the multiplicity of organizing activities under way in American communities by highlighting the key distinguishing variables at play in model building:

- *What is the belief system or ideology of the group's members in terms of societal problems and their resolution?* The more systemic and historical the stated beliefs, the more likely the group's model will focus on social action targets for change—identifying targets as potentially hostile or adverse to their efforts—and the more open to militant tactics. Likewise, the more present-day focused the group's belief system, the more likely its models will focus on collaboration among actors, including targets, with an emphasis on consensus-building tactics.

- *What is the mix of rights and responsibilities between professionals and community members and the decision-making roles they play in the group?* The more a group emphasizes the importance of systematic data collection and formal knowledge (on zoning, legal rights for tenants, etc.), the greater the emphasis on professional, agency-based decision making. Likewise, the greater the authority given to community members' voices to legitimate a group's efforts, the more tactical choices will be made that focus on member participation and decision making.

- *What is the mix of means and ends in achieving societal improvement?* Rubin and Rubin (2007) nicely capture the dilemma wrought by this classic organizing debate: "Is the transformation of people the goal in itself or is it a means to alter the broader society? . . . Will an improved society make people feel more efficacious or must people first feel empowered before a society will change?" (p. 317). Likewise, they succinctly pose this dilemma for macro practitioners in administrative roles:

Is the organization a tool to bring about change or is it an end to be achieved? . . . Without a formal organization sustained action is impossible . . . [yet] if the maintenance of the organization becomes too important . . . [it] may displace tackling important issues to its members. (p. 17)

While Rothman (2008) and others detailed a variety of other important variables (such as boundaries of the defined community, conception of beneficiaries, and the basic change strategy), the above three variables remain the pivotal constructs from which distinctive organizing models have emerged (Reisch, 2005; Rothman, 2008; Weil, 2005). In the rush and tumble of organizing for change across the United States since Rothman's typology appeared, it was only natural that a variety of distinct models would begin to sort themselves out, from the conflict-based Industrial Area Foundations (IAF) work that has built on Saul Alinsky's confrontational approach to social change (Chambers & Cowan, 2003) to Mike Eichler's consensus organizing model that maintains the same goals as the IAF while turning conflict on its head, instead consciously working on projects that begin with consensus building as a primary tactical mechanism for community change (Eichler, 2007; Ohmer & DeMasi, 2008).

Perhaps the most thorough distillation of present-day models is presented by Smock (2003), who carefully researched extant organizing activities in 12 cities and located five distinct models of organizing: power based, community building, civic, women centered, and transformative (pp. 33–34; see Table 8.1).

Examining 12 distinct community organizations from across the country, Smock's (2003) work brings into sharp relief the richness and variability of community practice today. Along with Rothman's (2008) work, her work helps macro practitioners involved in the community sift through their answers to questions of means–ends, roles and responsibilities, and systemic beliefs as they construct their own models of intervention. As Table 8.1 suggests, the power-centered model, growing out of the Alinsky tradition, would build disciplined people's organizations to confront political and economic leaders on inequities experienced by the local residents. Likewise, a civic model would look at the same issues as coming from basic instability and thus create citizens' forums to discuss these issues and work within the formal political agencies for resolution to their problems. Her other typologies can help less experienced organizers develop an understanding of how different models impact strategic and tactical choices so that their work maintains a strategic consistency in approach toward desired outcomes.

THE DISTINCTIVENESS OF COMMUNITY ORGANIZING FROM OTHER PRACTICE METHODS: IT'S NOT JUST THE COMMUNITY

Regardless of model emphasis, macro practice is distinctive within social work because of its *focus on social* problems that will in some way require interventions involving communities and organizations (Netting, Kettner, & McMurry, 2008; Rubin & Rubin, 2007; Weil, 2005). Community organizing is likewise distinctive within macro practice (as well as in other social work methods) because its emphasis on social problems requires *collective activity that necessitates a plan of action involving tactics and targets, some of which the practitioners initially have little or no power to create on their own.*

Whether a social planner from a large agency working in a community-wide human services coalition or a grassroots activist committed to social action strategies needed for social justice, one of the most distinctive qualities of a community organizer is that he or she operates in a role often lacking in direct power and authority to get things done. Because macro practice defines problems as social in character and thus necessitating the collective involvement of other groups, members, and organizations to be solved, a community organizer enters that group with decidedly less formal authority and fewer prescribed role definitions than the caseworker or group worker operating in clinical and micro practice settings. A group worker's membership has usually been predetermined; an organizer often has to recruit members; a caseworker usually works with people who come to him or her for problem solving or service of some kind; the organizer must go to the community, organization, or group to get them to attend. Most clinical practitioners,

Table 8.1 Models of Community Organizing

Model and Case Studies	Theory of Urban Change	Organizing the Community	Impacting the Public Sphere
Power-based model	<p>Build power:</p> <p>Urban neighborhood problems stem from the community's lack of power within the political decision-making process.</p> <p>Solution is to build community's clout so that its interests are better represented within the pluralist public sphere.</p>	<p>People's organization:</p> <p>Build large, formal, highly disciplined "people's" organizations to fight for the community's interests in the public sphere.</p>	<p>Conflict and confrontation:</p> <p>Use conflict and confrontation to demonstrate residents' power and pressure political and economic power holders to concede to community's demands.</p>
Community-building model	<p>Rebuild social fabric:</p> <p>Urban neighborhood problems stem from the deterioration of the community's social and economic infrastructure.</p> <p>Solution is to rebuild the community from within by mobilizing its assets and connecting it to the mainstream economy.</p>	<p>Collaborative partnership:</p> <p>Build broad collaborative partnerships of diverse neighborhood "stakeholder" groups, including nonprofits, business residents' association, and government.</p>	<p>Legitimacy and collaboration:</p> <p>Strive to influence public decision making through consensual partnership with government.</p> <p>Goal is to be recognized as the legitimate representative of the community as a whole.</p>
Civic model	<p>Restore social order:</p> <p>Urban neighborhood problems stem from social disorder and instability within the community.</p> <p>Solution is to restore and maintain the neighborhood's stability by activating both formal and informal mechanisms.</p>	<p>Informal forum:</p> <p>Create informal, unstructured forums for neighbors to meet one another, exchange information, and problem solve.</p>	<p>Accessing existing channels:</p> <p>Use official, bureaucratic channels for citizen interaction with local government to get the city services system to respond to neighborhood problems.</p> <p>Interact with services personnel on an individual-to-individual basis.</p>

(Continued)

Table 8.1 (Continued)

Model and Case Studies	Theory of Urban Change	Organizing the Community	Impacting the Public Sphere
Women-centered model	<p>Link public and private spheres:</p> <p>Urban neighborhood problems stem from the fact that the institutions at the core of community life aren't responsive to the vision and needs of women and families.</p> <p>Solution is to reconceptualize private household problems as public issues with collective solutions and to build women's leadership roles within the community.</p>	<p>Support team:</p> <p>Create small teams modeled on a support-group structure.</p> <p>Provide safe, nurturing spaces where residents can gather, provide mutual support, and build shared leadership.</p>	<p>Interpersonal relationships:</p> <p>Seek to build face-to-face relationships with the staff and administrators of public institutions to make programs and services more responsive to the needs of families.</p>
Transformative model	<p>Structural change:</p> <p>Urban neighborhood problems are the symptoms of unjust economic and political institutions.</p> <p>Solution is to challenge the existing institutional arrangements to create a more equitable society.</p>	<p>Social movement:</p> <p>Develop the ideological foundations within the neighborhood for the emergence of a broad-based movement for social change.</p>	<p>Creating alternative frameworks:</p> <p>View the public sphere as dominated by institutions that systematically disempower low-income residents.</p> <p>Seek to alter the dominant ideological frameworks and change the terms of the public debate.</p>

STRATEGIC MODEL-BUILDING ACTIVITY

Your community organizing project: _____

- Primary beliefs: Is the problem at hand primarily defined by you and other stakeholders as historical/structural _____, present-day _____, technical _____, social (based on race, gender, etc.) _____, hostile targets _____, or amenable targets _____?
- Professional practitioner–community member rights and responsibilities have a mix of what?
 - Primarily professional and based on formalized knowledge and skill _____
 - Primarily member based and based on neighborhood legitimacy _____
 - A mix of professionals and some community members _____
 - A mix of community members and some professionals _____
- The group resolves means–ends issues with a primary emphasis on
 - It is more important for the group to develop leadership capacity than to get immediate results. _____
 - It is more important to get results than to develop members at this time. _____
 - The program needs to survive even if it means we compromise the way we go about our work. _____
- Better the program be scaled back than we compromise on core values related to what? (Check no more than two.)
 - ___ Empowerment
 - ___ Civic engagement
 - ___ Working with targets as allies who are really enemies
 - ___ Ignoring social/historical issues that impact a problem
- Based on your answers, your community project is most like this model:
 - Civic _____
 - Community building _____

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Women centered _____

Transformative _____

Power based _____

- The strengths and limitations of this model for your project are as follows:

Strengths:

1.

2.

3.

4.

Limitations:

1.

2.

3.

4.

whether group or individual, nevertheless have the formal authority to terminate sessions or end a group member's participation, although they use it only as a last resort; most organizers gain authority in a group only over time, as they demonstrate their effectiveness either in accomplishing desired goals or their facilitation of group development. Likewise, a macro practitioner working as a frontline manager in an agency has the authority to call meetings, set agendas, and make changes in the scope and emphasis of a subordinate's work. Were a community practitioner, working in a neighborhood coalition or social justice campaign, to do the same, he or she would most likely quickly lose whatever credibility he or she had.

Such lack of formal authority greatly affects the trajectory and pace of a community practitioner's work. Organizing seems to start slower because so much of what an organizer initially does relates to the outreach and engagement skills discussed in Chapters 3 and 4 (as well as leadership development issues discussed in Chapter 6). This emphasis is a reflection of the limited authority one has in a community intervention.

The early stages of organizing require a community practitioner to develop the skills of influence, not power. The time spent in listening, understanding, problem posing, and give-and-take is both time well spent and, alas, sometimes awfully long. Like a building's foundation, it is this deep digging that ensures later strength and resilience as a group lives through the intensity of problem solving, model emphasis, and goal/target selection. (The Community Toolbox material at the end of this chapter outlines some of the key skills one can further develop for strengthening influence in a community organizing project, campaign, or coalition.)

As a community practitioner, you must therefore grow comfortable with the heightened ambiguity in your role and what you are doing, especially when compared with your

group- and casework colleagues, whose caseloads seem ever present and whose workweek is more scheduled. Later on, of course, the tempo in community organizing interventions will grow both more intense and more immediate in its focus as the early work of influence building and engagement is replaced by demanding campaign tactics, timelines, and targets to influence (Staples, 2004). Part of what makes community organizing both so challenging and so exhilarating is that the authority a practitioner has gained at this point will have emerged from the legitimating give-and-take between members as they have worked together. While harder to get, such authority is also more resilient and democratic in ways that can add real meaning to the legacy a macro practitioner begins building from the start of his or her career.

FROM CHECKERS TO CHESS: THE THREE LEVELS OF STRATEGIC DEVELOPMENT

As we can see from the previous section, when starting a career as a macro practitioner, the new community organizer understandably can be overwhelmed by the world he or she has entered. Working in an ambiguous role with little formal authority, a new practitioner would also for good reason latch on to one of the models described above as a way to sort through what it is he or she is actually expected to do to be a strategic community organizer and not just a well-meaning, easily misled activist. While a model is an excellent place to begin, there are, in fact, three levels to model building that are reflective of an organizer's growing strategic capacity to utilize the entire chessboard of macro practice.

Entry-Level Strategy Formation

I call this first stage of a community organizer's strategic development *entry-level strategy formation*. Entry-level strategy is the equivalent of a good checkers game where a skilled player uses a few of the red or black pieces immediately before him or her to make the next move or two on the board. For example, working within the empowerment model outlined by Smock (2003) above, an organizer working on youth development would stress process goals of member capacity building over concrete results, with the target of change being the members themselves and, perhaps, their growing influence inside their school or youth organization. A series of tactics (giving various meeting assignments to selected members, choosing inspiring speakers who also serve as role models, etc.) would adroitly be created over time so that members grow in confidence and skill level. The group's efforts might culminate in a group project or celebration where other community members (parents, school administrators, community leaders) are invited to witness their expanded leadership capacity. If the young people are successful, the other community stakeholders are asked to recruit some of them into newer positions of responsibility, thus

leading to a broader and larger effort in the future, with the youthful leaders taking a more significant leadership role than they had in the past.

Worked on over time, this entry-level empowerment strategy would allow the new community practitioner to develop the following basic repertoire:

- Solid skills that connect long-term strategic outcomes (improved leadership capacity of youth, wider acceptance of the group within the larger community) to
- a series of tactical choices whose completion of concrete objectives (selecting effective inspirational/role model speakers, providing assignments that young people new to organizing can successfully take on, etc.) can be linked to those outcomes,
- all of which lead to the long-term strategic goals of wider community acceptance and
- creating future endeavors that could expand youth influence within the community.

Entry-level strategy formation is sufficiently demanding to also challenge the practitioner to consider the belief systems, means–ends debates, and roles, rights, and responsibilities that he or she and the young people develop together: *How much do I assert my direction on the group if they choose a speaker I feel the adult community will disapprove of? How much do I, as a sign of trust, accept a young person's reasons for not completing a job as opposed to challenging him or her not to "get over" on me?* These questions are cause for deep reflection, not pat answers, for they speak to a macro practitioner's long-term commitments toward widespread social change. This is why it is important to underscore that entry-level strategy formation is not a simplistic or easy stage of one's development as a community practitioner. In many ways, it is the most difficult, because one learns whether or not one is suited to both the challenges of community practice and the often indirect types of concrete results that any organizing campaign may deliver.

ACTIVITY FOR ENTRY-LEVEL STRATEGY

Issue: Youth leadership/opportunities for jobs and school-related activities needed for college entrance

Long-term goals:

Process: Youth develop leadership skills of public speaking, group problem solving, and collaboration.

Task: Youth forum (demonstration of skills, talents, leadership)

Targets and timelines: School leadership, local employers, and parents will attend forum in 3 months.

Weekly objectives and related tasks (partial listing):

1. Schedule meetings, secure meeting rooms, times
2. Invite student leaders
3. Discuss ground rules for working together, explore topics of interest, work with group to decide on others to invite
4. Begin discussing possible topics, needed talents/skills for forum
5. Future weeks: At weekly group meetings, invite speakers/trainers, practice skills, review specific tasks for event preparation

Set new tasks and process-related objectives at the end of each weekly meeting with group. The closer to the actual event, the more time spent on concrete tasks and focused student-leader assignments/responsibilities.

Now apply this exercise to your own group or campaign.

Your issue: _____

Long-term goals:

Process: _____

Task: _____

Targets and timelines: _____

(Continued)

(Continued)

Weekly objectives and related tasks (partial listing):

- 1.
- 2.
- 3.
- 4.
- 5.

Set new tasks and process-related objectives at the end of each weekly meeting with group.
The closer to the actual event, the more time spent on concrete tasks and focused student-leader assignments/responsibilities.

- 1.
- 2.
- 3.
- 4.
- 5.

Coalitional Strategy Formation

The second stage is *coalitional strategy formation*. As Mizrahi and Rosenthal's (2001) work documents, coalitional strategies require a practitioner to have mastered entry-level strategies plus the often-hidden agendas of other coalition actors who purportedly are working for the same cause and yet may have other, more organizational objectives at play in the group. (We saw an example of this in the Chapter 5 case study, when three representatives of minority agencies voted against the majority of the group because the leadership was downplaying their concerns related to financing.) Likewise, another agency may have nothing in common with other actors beyond the cause at hand or for momentary legislative purposes of passing or blocking some legislation (Rubin & Rubin, 2007).

Here an organizer must expand his or her use of the chessboard by understanding the underlying issues regarding a coalition's membership. First, why has each member (who represents an agency or group) joined the coalition to solve what seems to be a common

problem? What is each member's individual agency or group motivation? Is it the same as each other coalition member's, or are there other reasons for his or her presence? How directly does the coalition's target goal impact each group? If groups have either different reasons or different levels of concern for joining the same coalition, they may be united on the coalition's goal (say, increased state funding for a project or population) but not on how they will work together, what their contributions need to be, and how the group should make decisions.

A practitioner must also learn who has joined the coalition to pursue the coalition's goals and who has joined to influence other members of the coalition. The latter may see the actual goal as secondary to influencing the other members on separate issues or recruiting them to different causes. For example, an environmental coalition may have 30 members in pursuit of changes in laws that affect the building of a nearby cement plant, but within that large membership are three groups attempting to use the group formation as a platform to influence others on topics such as animal rights, nuclear proliferation, or regional climate control.

An organizer utilizing coalition strategies has expanded his or her use of the strategic chessboard by being especially sensitive to the *strategic meaning behind individual coalition members' decisions on tactical choices*. A group member who has tried to link a coalition's concern about an individual cement plant's pollutants to nuclear proliferation may be trying to move a group from a local or state issue to a national issue.¹ Likewise, a coalition member whose funding may be grossly affected by a legislative decision may seek to demand participation from other members who are concerned about but not as affected by the issue (or the reverse could happen, where a powerful coalition member has only minor interest in an issue and ratchets down participation requirements that may weaken the coalition's overall impact).

Understanding different strategic interests related to various tactics, the effective coalition strategist helps the group *cut the issue and the means by which it is dealt with by the coalition* (Burghardt, 1982; Mizrahi & Rosenthal, 2001; Rubin & Rubin, 2007) so that it maintains its focus on the change at hand and preserves as much unity as possible. As Rubin and Rubin (2007) cogently argue, "cutting the issue" means framing it in such a way that each coalition member sees the benefit in working with others and everyone has reason to be supportive, even if the stakes remain greater for some than for others. Having achieved this strategic objective, the skilled practitioner also helps the group define the norms of participation and membership so that individual groups cannot dominate others for their own ends. By cutting the issues so that the coalition goals are broad enough to invite significant participation while at the same time spelling out what is and is not acceptable to pursue, the coalition strategists have gone far in uniting what otherwise would be disparate groups. In so doing, the practitioner has evolved in strategic sophistication by using the "chess pieces" of the coalition for multiple tactical purposes that serve the same strategic outcome: the success of the coalition in achieving its stated goals. His or her use of the chessboard has expanded as well.

ACTIVITY FOR COALITIONAL STRATEGY FORMATION

Coalition and issue: _____

Number of different members: _____

Unifying coalition goal (passing legislation, anti-large development project, national campaign on global warming, antiracism, etc.):

Chosen tactics to achieve goal:

1. _____
2. _____
3. _____

Are all groups aligned on tactical choices? If not, consider strategic reasons for differences:

1. Different agency commitments related to funding issues or alignments with targeted groups
 - a. Funding
 - b. Alignments
 - c. Other reasons
2. Tactics viewed as serving other strategic purposes related to other issues (other political concerns or other campaigns' objectives)
 - a. Attempting to influence members on other campaigns
 - b. Using coalition to advocate for other causes as first priority
 - c. Other
3. Unwillingness to invest resources to participate due to competing demands
 - a. Competing demands
 - b. Indifferent/token participation
 - c. Other
4. What commitments/norms of participation, discussion, and alignment can you and the coalition leadership create that are respectful to the entire membership and still place primary emphasis on the coalition's agenda?

- a. Agreement on participant activity and voting rights
- b. Norms on discussion items at meetings
- c. Alignment on campaign message and other messages of group
- d. Other norms and commitments

Transformational Strategy Formation

The most advanced stage of strategy formation is *transformational strategy formation*, where an organizer is using the entire game board for a variety of strategic purposes. What makes this work advanced is not necessarily the complexity of the goals and objectives sought by a group or by someone speaking about issues in a more complicated manner. If anything, practitioners engaged in transformational strategies can often appear to be involved in very simple undertakings (albeit a lot of them). What makes their strategies transformational and thus more advanced is four underlying dynamics:

- *A strategic ability to use different models of organizing at the same time, even though their approaches may seem quite distinct from each other.*
- *A developed set of consecrated values within their internal strategic vision that moors them to bedrock principles of action while allowing for tactical flexibility.* These principles, tested and refined through experience, then allow for short-term tactical and strategic flexibility as well as the wisdom to know when long-term beliefs and practices will be too compromised for transformational work to continue if done in that manner or within that alliance.
- *A strategic flexibility to form alliances and coalitions with groups that may or may not be aligned with them on other programmatic issues.*
- *An organizer's personal mastery of his or her own transformational strategic commitments so that he or she models the change being sought in the daily activities, group meetings, planning sessions, and campaign work of which he or she is a part (Senge, Scharmer, Jaworski, & Flowers, 2005).*

Using Different Organizing Models: The Ella Baker Center of Oakland, California

An organizer draws from a series of planned change interventions from a variety of models, whether empowerment, civic, or power centered. This approach is called *mixing and phasing* by Rothman (2008) and underscored by Smock (2003) as she assesses her transformational model.² It was this expansion of the chessboard that so amazed Ellis in the introductory case study example. While fictionalized, Ellis's work in many ways could refer to the work undertaken by Van Jones, Jakadi Imani, and others of the Oakland,

California-based Ella Baker Center, a formerly grassroots-based organization created to campaign against police violence and antiracist work that has grown into a powerful community-based institution focusing not only on police violence but also on “green-collar” jobs that would marry the inner city of Oakland to the far more bucolic and upper-middle-class Marin County (Jones, 2008).

In many ways, the Ella Baker Center’s evolution mirrors its transformational strategic development. The center began in the mid-1990s as a deeply committed, social justice-based organization with a skeletal staff fighting racism and injustice as seen through police violence, profiling, and racially disproportionate incarceration. Using a variety of skilled tactics through a power-based model of social justice-based campaigns emphasizing confrontation and clearly defined targets for change, the center’s leadership soon realized that fighting for social justice against the police and the courts, no matter how noble, didn’t do enough to alter the widespread hopelessness, lack of economic development, and underdeveloped pathways toward a better future that the young people of Oakland desperately sought.

The leadership knew its strategic focus had to deepen to meet young people’s needs. What’s important to underscore here is that in broadening their strategic emphasis, those leaders did not give up either their analysis of police brutality and unjust imprisonment or their campaigns for social justice inside the criminal justice system. What they instead did was link this power model campaign (in many ways, a traditional antiracist campaign common to the civil rights struggles over the past 40 years) to a civic campaign for green jobs that joined the mostly middle-class environmental movement to causes of inner-city economic development (see www.ellabakercenter.org for more of its history).

Tactical Flexibility Without Loss of Principle

This ability to link different models of organizing inside one overarching vision for change is a core dimension to transformational work. As a group develops this multimodel approach, other parts of the work will reflect a similar mix in its tactical focus. In turn, this flexible focus maintains its underlying bedrock commitments through the little things in the group’s work that reflect *its core values consecrated in action*. A further example of this is what the Ella Baker Center, working with the Oakland Apollo Alliance and Laney College, created as a curriculum for its green jobs program. Working with Racquel Pinderhughes, a noted academic scholar on the green economy who was skilled at training and teaching the long-term unemployed, the Ella Baker Center developed a jobs training program that corresponds to other strategic objectives that are the core of the center’s vision (www.californiagreensolutions.com).

Briefly outlined, the program does not look particularly distinct from other jobs programs:

- An outreach campaign to possible participants
- Preconstruction and basic skills training

- Laney College Bridge to Solar and Green Construction curriculum
- Social support and case management

Look more closely, however, and you see that the center has remained true to the principles listed below that guided its first antiracist work:

- The outreach was conducted by the Cypress Mandela, a construction trades program originally established to reach long-term underemployed workers, many of them with records of incarceration. As we saw in Chapters 3 and 6, outreach campaigns require an ability to establish trust with the people one is working with and to do so within a framework of multiculturalism and gender inclusiveness. Cypress Mandela's staff had such a skill set to approach and win over people who otherwise might be mistrustful of traditional college outreach programs. By embracing principles of both the civic model and the women-centered model in their outreach, the group was able to reach and sustain participants who otherwise often drop out of such programs.

- The pretraining program set high standards for both attendance and the skill sets one would need for a green job while respecting the lack of opportunity and basic training in job readiness for participants. The program respected the struggles from their backgrounds that left them underprepared for consistent work and provided them with new tools to achieve basic job preparation. At the same time, the program made clear that the technical skill set participants eventually would need for a well-paying job would require other, more demanding skills on which they would receive later training. This mix of respect and challenge addressed in Chapter 5's discussion of leadership development is a critical ingredient to long-term strategic objectives of an empowerment and transformational model of organizing.

- The Laney College Bridge to Solar and Green Construction curriculum, a college credit program, taught technical skills such as how to install solar panels and did so through a learning framework that placed those skills in the context of environmental sustainability and environmental justice. By blending social issues in with technical skills, the program never lost sight of the communities it sought to serve and other, larger social conditions that affected them. Such a weave of the social inside the technical is an exemplar of how social justice values are consecrated in other, seemingly very different kinds of work.

- The program offered paid internships and apprenticeships on the job while continuing to provide case management support. Entering a demanding green construction job doesn't mean that the vestiges of long-term underemployment, economic insecurity, and both internalized and external measures of oppression disappear with the first paycheck. By continuing with social support and case management, the group recognizes that long-term economic and social marginalization requires long-term support to sustain this workforce as well (see www.ellabakercenter.org).

In this more systematic review, it becomes clear that each programmatic activity is screened through the original lens of grassroots social justice and antiracist work while adapting to the immediate demands and opportunities of the present-day context. The center's strategic experience weaves its principled commitments of the past into a multi-model approach to green jobs that transforms a traditional training program into a program of ecology, economic development, individual empowerment, and social justice.

Rather than sacrificing its original commitments, this program makes them an integral part of everything it does. The result is strategic flexibility in the use of different organizing models and a sustained commitment to core values without losing the ability to pragmatically serve the immediate needs of the Oakland community.

ACTIVITY FOR TRANSFORMATIONAL STRATEGY FORMATION

1. Identify a program you are involved in: _____
2. Reflect on and clarify three core values you have had as a grassroots organizer committed to social change and social justice:
 - a. _____
 - b. _____
 - c. _____
3. Identify the core parts of your program, including outreach, group meetings, primary activities (campaign work, leadership training, etc.), and other services.
 - a. Outreach _____
 - b. Group meetings _____
 - c. Primary activities _____
 - d. Group maintenance activities _____
 - e. Other services _____
4. Identify a way your core values can be consecrated in action and woven into each segment:
 - a. Outreach and consecrated value in action (CVIA) _____
 - b. Group meetings and CVIA _____
 - c. Primary activities and CVIA _____
 - d. Group maintenance activities and CVIA _____
 - e. Other services and CVIA _____

5. As you reflect on each segment, what organizing models do they encompass (civic, power based, women centered, community building, transformative)?

a. _____

b. _____

c. _____

d. _____

e. _____

DEVELOPING STRATEGIC FLEXIBILITY WITHOUT COMPROMISING CORE VALUES: A CASE STUDY OF A TRANSFORMATIONAL ORGANIZER'S INTERNAL STRATEGIC VISION

Developing Parent Leaders While Fighting for Power as the Foundation to Educational Reform

More than two generations ago, the fight over community control of schools that became famous as the Ocean Hill–Brownsville case study (Gittell, 1998) led to a decades-long breach between the powerful New York City Teachers Union, the United Federation of Teachers (UFT), and parent-led alliances for school reform. The racially charged animosity from that time had lived on inside both the UFT and various parent reform groups that sprang up over the ensuing years so that little collaboration occurred, no matter the common cause they might share for improving school performance (Fabricant, 2010).

Over time, shifts did begin to occur as new teacher leadership and different community voices began to be heard. For example, the UFT president Randi Weingarten and Brooklyn-based ACORN activists began forging an alliance on school reform that served as a foundation for other community–union relationships. Thus, in 2006, Weingarten and the Coalition for Educational Justice's (CEJ) leadership, many of whom had begun their school reform efforts by seeking the ouster of an individual school principal, sat down together to work on a powerful educational reform package that extended parent voice inside the schools, expanded use of lead teachers, and focused on middle school improvement as key benchmarks for lasting educational reform in New York City (Fabricant, 2010).

What had happened to lead once-antagonistic actors to work together effectively when 40 years of previous efforts had failed? Was this a strategic alliance of strange bed-fellows, inevitably doomed to failure, or a new formation that, in combination with other

citywide activist groups, had the staying power and internal capacity to work together for the long haul that all reform efforts require in a large city? Was the alliance between CEJ and the UFT an authentic community–union partnership where the voices of parents were genuinely respected by seasoned union leadership or one that relied on token community involvement, while real decisions occurred only among professionals?

The success of the group in brokering a powerful reform package with the New York City Board of Education and its powerful chancellor, Joel Klein, on middle school improvements, including both more parent voice in school decision making and an expanded use of mentor teachers to guide inexperienced staff in the classroom, suggests that the alliance between parents and union officials was an authentic one, not a shell. That said, the answers to how these parents developed such leadership and sustained authority with these other powerful stakeholders did not lie in some overnight decision to suddenly and serendipitously work together. As with almost all transformational strategic decisions, the answers instead lie in years of organizing among a group of people who carefully built both the internal capacity among the parent membership and the external credibility with other public education stakeholders to make such partnerships possible. As also could be seen at the Ella Baker Center, true transformative activity was possible only with genuine involvement of many people over many years. And like the center and the early organizing role of Van Jones, CEJ cannot be fully understood without examining the experience of its first lead organizer, Eric Zachary.³

Zachary began his organizing in the antiwar and antiracist work common to the early 1970s, moving on through his master's in social work with a focus on community organizing and then beginning his professional career as an organizer for the powerful hospital workers' union, 1199. Wanting to invest more of himself at the neighborhood rather than the union contract level, with the kind of people he had grown up with in the working-class, multiracial world of Coney Island, Brooklyn, by 1989 he found himself working in a drug prevention and parent training program at John Jay College designed to improve school performance in some of New York City's school districts. On the face of it, this program, like the Ella Baker Center's, was similar to countless other prevention efforts: substance abuse training, a skills focus on how to run meetings and lead groups. However, Zachary's life and work experience had led him to emphasize two or three core values that, applied in the training itself, made the training transformational. "My mother instilled in me genuine respect for all people so that it's part of my core, it relates to how I believe everybody deserves to be dealt with."

This seemingly simple value of respect was joined to his belief that working-class people of all races often had untapped abilities to lead. In combination, these values and beliefs were translated throughout his John Jay training program as a fundamental orienting principle in its design: "Demonstrate deep respect for adults in everything one did," and "put [those values] toward the service of the learning." With those principles in mind, Zachary internalized a fundamental question that guided how those values would be put to use:

For me, the question is what values guide you and how do you use them to guide your work—how do you manifest them in ways that is the best fit for you . . . to whose service do you put your skills and values to work? For me, it always related to poor and working class people.

Over the years, this powerful strategic vision that emphasized respect for those in the training session, especially because it was conveyed consistently toward people that others in the school system often marginalized, at first found expression through a powerful training design for parent leadership inside New York City schools (Zachary, 1998). Begun at John Jay, its core elements were these:

- As with all good organizing, the training program started with where people are, which translated concretely into these steps:
- Icebreakers that relax people and make them feel comfortable in a learning environment. Many people from oppressed and marginalized communities have not had good experiences in formal educational settings. “Can training use this initial moment to maximize a connection, as occurs in organizing, or not?” Thoughtful icebreakers did just that.
- Agendas for training needed to reflect the participants’ concerns, not just the organizers.’ The people’s voice was therefore a core part of every session, not an add-on.
- Like Paulo Freire’s popular education model, Zachary’s training “started with people’s experiences” as the legitimate focus of the learning, “using it as a bridge to discuss what they need to do that may require new skills.”
- Using a group-centered approach that emphasized the collective wisdom throughout the room and not just at the front, the trainer/facilitator worked with the group to arrive at a “collective idea that they have learned from each other.” In this way, parents internalized that their learning became more and more horizontal (and thus from one another) rather than vertical, from the trainer/facilitator.
- The training design was all about “setting up a learning environment where it’s safe to take risks” in what people can do together. Some of the risks are related to being able to disagree with the trainer, to take a chance that their own ideas are as worthy as a more credentialed member of the group, and the like. Zachary’s training design at John Jay fostered an environment in which such risks could be taken. As one parent leader later noted:

People will get embarrassed speaking in English and not want to make a mistake. . . . Sometimes they have a good idea but they don’t want to present it. They won’t take the risk. . . . People will take the risk at meetings because of the translator but also because they begin to see this is a place where they can take a risk. (Fabricant, 2010, pp. 109–110)

Worked on together over time, the ensuing internalized belief in parents' capacity to give voice to ideas about organizing served as a powerful exemplar of what Freire (2000) meant when he wrote "to name the word is to transform the world" (p. 114). It was the training model's design that used the ongoing give-and-take between parents as a testimony to Zachary's belief that people from all walks of life could indeed act on the world in a powerful, strategic way.

From Training to Organize to Training While Organizing: The Power of the Prep

The dilemma Zachary faced emerged from the very effectiveness of his training program. Parents involved in their schools who came to the John Jay leadership program were personally more effective and engaged in their schools, but Zachary's experience as an organizer inside the powerful hospital union 1199 had made clear to him that without systematic organizing, there could be little lasting change inside the educational system. What good was great training if it didn't foster systemic change? Moving from John Jay to New York University's Institute for Education and Social Policy, in late 1996 he set about with others in the Bronx to create organizing programs that took on more systemic problems inside schools.

With a preeminent focus now on organizing, a new problem almost immediately popped up. Where before he was training people on leadership and strategic skills with little systematic organizing, now there was so much organizing that there was little time for formal training. Here, Zachary refined an important innovation begun by other experienced organizers pressed for time, yet committed to genuine leadership training: *leadership training as a systematic part of the preplanning process of organizing rather than as an adjunct to it*. Leadership development, both for individual parents as they prepared for a speech or for a group of parents working on a press conference, became fundamental to the preplanning work before each and every action in a unique way. Utilizing the same principles within the former training program, Zachary and others from New York University, including Mili Bonilla and Barbara Gross, *began to use preplanning not simply to plan events but to pose issues and dilemmas for people themselves to answer so that they would take gradual ownership of the organizing campaigns*. As Ocyntia Williams, one of the leading parent advocates reflected:

Basically, the training, the preparation gives you confidence, knowledge. I guess the knowledge gives you the confidence, and just knowing that someone else believes that you can, reaffirming what you've learned by telling you that you did a good job at a meeting, or by helping to prepare you for a meeting. In our

conversations we discovered certain things by looking at the data. The data says a, b, and c schools have been at this level for a long time and then it makes you think: Why? Why hasn't there been any improvement? And then I guess you have this awareness, not just the academic part. We can now suggest reasons for the data and the school failing. (Fabricant, 2010, p. 176)

- Through the use of prep as an arena for leadership training as the organizing evolved, the parents began to experience leadership, both individually and collectively, as a group-centered activity in which everyone contributes, rather than just the few. In this way, taking on the responsibilities of leadership becomes a shared activity rather than an isolating one (similar to what was discussed in Chapter 5 about leadership development).
- Organizers were selected for this work who demonstrated the same genuine respect for and comfort with the working-class, racially diverse parents involved in their school campaigns. As organizers, they developed their skill sets in ways that helped pull things together through structured interaction and group decision making, trusting that the group would arrive at the right answers in ways the singular organizer/trainer running a campaign primarily alone could not.

Of course, the purpose of the prep work was to develop leaders in organizing campaigns that could affect change inside public schools. Therefore, the results of the organizing activities inside the schools were brought back into future prep work as the group once again reviewed what did and didn't happen. "In this way people get to reflect on what did and didn't work, but not alone. . . . It was through the efforts of the group, not the individual" (E. Zachary, personal communication, June 2009). In this way, the model for leadership that parents internalized was about themselves in relationship to the group, not as solitary leaders.

It is the culmination of this long-term work, starting as a training program at John Jay and evolving first as a parent-led group in the Bronx prepped for coleadership and then into a citywide alliance with other powerful community groups, that made the eventual alliance between parents and union leaders work (Fabricant, 2010). Through the power of the prep and its application to real organizing, its ongoing give-and-take through group-centered leadership, and the safety in which risk taking could occur, Zachary and other parent leaders have created a powerful organizing model for transformational leadership. Today, community folks from across New York can work with other, powerful educational authorities without intimidation or undue deference. Because people's sense of who they are as leaders was framed in part through a powerful, nurturing, *and* challenging environment, when parent leaders finally arrived at the planning table with a powerful figure such as the UFT's Weingarten, they had the internal leadership

capacity to work alongside her in ways that demonstrated flexibility without simply agreeing with her. As Herb Katz, UFT vice president, expressed later, “The give and take was real, with real input from all sides, and real respect, too. That doesn’t happen overnight” (Fabricant, 2010, p. 219).

Zachary’s work demonstrates that an organizer’s personal mastery models the change he seeks in terms of coleadership, shared decision making, and the capacity of others to inform a difficult and demanding organizing campaign. As noted earlier, Senge’s (1994) example of personal mastery is of the master potter who effortlessly creates a work of art. Such mastery is not about intensely dominating anything, whether a pot or a group of people; it is achieved only through the consistent efforts one makes over time. It is neither a specific skill nor a technique that can be picked up from the printed page or by mimicking another. It is thus perhaps no accident that when speaking about his organizing model, Zachary began by reflecting on his life, not his work:

I’m not sure I have a model, but whatever it is it flows from the core of my life experiences with all the diverse people I grew up with . . . and the respect I have for who they are. . . . I put that at the service of my learning, and whatever learning goes on in [my] work. (E. Zachary, personal communication, June 2009)

Looking at his work as an organizer, one can see that these deep-seated values of respect, seeing diversity as an asset, and believing learning best happens as a shared experience have been constants in all the work he has done, whether as an organizer for the hospital union 1199, a training developer for parents working out of John Jay College, or the lead organizer in a citywide parents’ effort for school reform. Importantly, this has meant that Zachary esteems what others bring to the table without denying his own worth:

I’ve always had the belief that the more people from the community are able to own what they’re doing, the more involved they’ll be. . . . So I never pre-judge what people are capable of answering [about a campaign’s choice of tactics], and I don’t deny my own experience, either. . . . Having confidence is not the same thing as arrogance. (E. Zachary, personal communication, June 2009)

It is this combination of personal confidence and belief in others that partly explains Zachary’s remarkable talent for problem-posing with others during prep time as they work on campaign strategy. Freire (2000) describes problem-posing as follows:

The problem-posing method does not dichotomize the activity of the teacher-student [organizer/parent leader]: she is not “cognitive” [learning] at one point and “narrative” [teaching] at another. She is always “cognitive,” whether preparing a project or engaging in dialogue with students. He does not regard cognizable

objects [strategic ideas] as his private property, but as the object of reflection by himself and the students. . . . The students—no longer docile listeners—are now critical co-investigators in dialogue with the teacher. (pp. 80–81)

For Zachary, problem-posing with those with whom he works has guided him as his own organizing efforts have led him into larger and larger campaigns that necessarily removed him from daily grassroots activities as he worked with major educational stakeholders, sought larger grants, and strategized with other parent leaders from around the city. For at each new level of involvement, strategic issues and complexities grew larger, not smaller. Choosing whether to work in coalition with certain actors or whether to emphasize tactics of confrontation over compromise and conciliation were dilemmas he could not answer on his own:

There have been numerous times since 2006 where we were in negotiations [with the New York City Department of Education] where I had to go back to people to see what to do. . . . We'd have emergency conference calls. My job was to lay out the dilemmas clearly so people knew what our options were. . . . Of course it was more work, but that's what kept us together. (E. Zachary, personal communication, June 2009)

That Zachary consistently would check in with parent leaders as high-level negotiations were under way clarifies the difference between problem-posing as a momentary technique and problem-posing as integral to one's vision and the personal mastery it takes to express it throughout one's life and work. Problem-posing as a technique simply uses questions as another method of inquiry; learning and those who provide it are still objects toward the organizer's already defined strategic ends. Problem-posing as Zachary uses it is tied to his fundamental belief that the meaning of his work, as well as its effectiveness, necessarily must involve parent leaders. His masterful and seemingly effortless series of questions—asked early on as a parent leadership trainer—because it flowed from his deeply held strategic vision, continues to reappear years later in his prep work and in his work as a nationally known organizer for educational reform because it is not a technique but, rather, the only way he knows how to be in relationship with others—whether as trainer, organizer, or human being.

Like watching the master potter, seeing Zachary in action means not really seeing much. He doesn't dominate discussions in a group. If there's a party or celebration related to some work, you'll probably find him serving the drinks or setting up, not giving toasts or working the room. Because he prefers to wear T-shirts and jeans or Dockers (with his keychain conveniently dangling from a belt loop) rather than jackets and ties, you'd never assume he is a significant player in educational reform or that others around the country are seeking to replicate what he and other parent leaders have created. But the parents are

aware; they observe the little things he does that reflect his deepest commitments. As Denise Moncrief explains:

My self-confidence since coming to CC9 [the forerunner to NYC CEJ] has skyrocketed. I never knew I could speak to people and get them to listen; speak to people and move them; and speak to people and impart knowledge that wasn't trivial. . . . When we did the first rally, and they wanted me to do a speech, and the mission statement, I had thirty seconds of stuff written out. They said you have to make it longer. They encouraged me and Eric walked me through the entire thing. By the second rally, it was "Leave my speech alone! Don't touch it!" No matter what I have wanted to do, I have always felt supported by them. They have shown extreme confidence in me being able to do whatever they need me to do. And that makes me want to produce all the more. (Fabricant, 2010, p. 118)

Because he is a genuine transformational organizer, Zachary's legacy lies in the efforts to reform schools that are led through Denise Moncrief's voice, not his. His entire chessboard is in play.

ERIC ZACHARY'S INTERNAL STRATEGIC VISION FOR THE COMMUNITY-BASED COALITION FOR EDUCATIONAL JUSTICE

Who: Working-class and poor people, often people of color

What issue: Educational justice, parent leadership, creating schools responsive to parents and families as the foundation for reform

How he works: Builds strategies in dialogue with parents; seeks coleadership on all strategic issues; starts where people are and challenges parents for new levels of commitment (plus one); seeks democratic decision making from below; models the change he seeks through small actions grounded in respect for the daily work

Core values consecrated in action: Respect, diversity, fairness, equality, reciprocity, social justice

Choose Your Dilemma: A Transformational Strategist Moves on in the Fight for Educational Reform

Any transformational strategist works with tactical and strategic dilemmas throughout his or her career. For example, Zachary handled the dilemma of leadership development versus accomplishing concrete educational campaign objectives by developing "the

power of the prep” to do both. He was well aware of even more fundamental dilemmas related to the reform efforts themselves. On the one hand, “the Coalition for Educational Justice’s independence allowed for more creativity and autonomy of action, but operated with far less power inside to influence long-term change.” At the same time, over the years of working with the UFT, he saw that “the union had far more power and resources to bring to the table,” albeit within a more traditional, institutionalized approach.

In 2009, Zachary was asked by the American Federation of Teachers’ (AFT) president Weingarten to help develop a robust community engagement program. Over the next 6 months, he crisscrossed the country, visiting locals in California, Minnesota, Chicago, Philadelphia, and Houston. The positive response led him to present a proposal on community engagement for the union. While to the outside, “community engagement” can sound pretty tame, within almost all unions, such engagement would represent a cultural sea change to successfully implement. Weingarten and Zachary understood that in the 21st century, only through such engagement could unions withstand the attack from the right that has been a major emphasis of the conservative movements of the day. With union membership nationwide down from 32% in the 1950s to 11.3% in 2013, a new paradigm shift in union–community relations had to happen if public educational reform efforts were to include them as they had in the past.

To begin the campaign, the AFT president announced her full support for the effort so that it had the legitimacy and authority to move forward. People used to the more insular, contract-driven focus of the past 40 years would be supported and trained to develop the skills and approaches on how to do this engagement. Weingarten provided resources to hire five experienced, energetic regional organizers and accepted all the personnel selections Zachary and his team made for this new initiative. Together, Zachary and the new organizers are working with about 10 locals in each of the five regions to build this collaborative model. The training curriculum emphasized a number of skill sets that they have labeled “The Five Ms”:

1. **Map** the region in terms of resources, important community actors, levels and types of power, and who shared their values and approaches to public educational reform
2. Develop **messages** that are authentic to the union and resonate and connect with the community
3. **Mobilize** to learn how to engage members and citizens in working together in support of shared goals and objectives—both for the community and for the union
4. Learn how to run **meetings** that allow all voices in the room to be heard, and practice shared decision making so that trust is deepened for the long-term work ahead
5. **Move to action** by creating plans that drill down to the schools and what they need as well as work to broaden support through shared agendas on other community efforts

The paradigm shift of inside–outside collaborative work on both union concerns and community interests underscored the need for a long-term strategic perspective on building power solid enough to push back against the forces aligned against them in support of privatization and charter schools as the keys to educational reform (Fabricant & Fine, 2012). Pushing such a paradigm required encouraging local members long used to and still in need of short-term, contract-specific issues to take risks in thinking longer term and to treat community groups as full partners—a risk the AFT president and her new director of the AFT Human Rights and Community Relations Department were willing to take.

Luckily, Zachary was undertaking his efforts alongside a major AFT local based in Chicago, led by the local’s president Karen Lewis. Aware of the importance of parental support for any militant action the union might have to take in support of its members, the Chicago UFT had begun its parent engagement work in 2010. They created a community advisory board comprising parents and other community stakeholders 2 years in advance of the strike that occurred in 2012. Equally important, the union demonstrated genuine support for the community’s struggles and not just its own, turning out in support of various housing foreclosure campaigns that impacted poor and working-class people across the Windy City in 2011. The result was that when the union struck against Chicago Mayor Rahm Emanuel’s efforts to further privatize the school system, widespread support from parents forced him back to the table far sooner than he anticipated, resulting in far more concessions on privatization than expected (Davey & Yaccino, 2012).

Such success has bolstered the union’s efforts. For example, one of the new organizers, working with the Philadelphia local president and a range of community groups, helped develop Philadelphia Coalition Advocating for Public Schools—bringing community and student stakeholders into an alliance for the first time. The coalition created its own reform plan for Philadelphia education as a counter to mayoral efforts to privatize 40 public schools. Having now enlisted other unions, such as the Service Employees International Union, the union–community collaboration is recognized as a genuine force not seen in Philadelphia educational reform efforts for years.

Other collaborative efforts are under way in all five regions across the country, developing 12 “town halls” to bring parents, teachers, and advocates together—with an emphasis on mobilizing parents, community members, and union activists around developing bottom-up solutions for our struggling schools. In early spring of 2013, Zachary and his staff brought together 100 people from these regional groups and locals to synthesize a national platform that continues to build the work. While he would be the first to tell you that the work requires as many doses of patience as it does persistence, his commitment to social justice as central to educational reform continues.

ERIC ZACHARY'S INTERNAL STRATEGIC VISION FOR WORKING IN THE UNION MOVEMENT

Who: Union leaders and members as well as working-class and poor parents, often people of color

What issue: Union–parent collaborations, educational justice, parent leadership, creating reform efforts responsive to both unions and parents, and families as the foundation for reform

How he works: Builds strategies in dialogue with union leaders and parents; seeks coleadership on all strategic issues; starts where people are (both union members and community members); challenges stakeholders to new forms of commitment (plus one); seeks democratic decision making from below and across reform groups

Core values consecrated in action: Respect, diversity, fairness, voice, equality, reciprocity, social justice

CONCLUSION: FROM ENTRY-LEVEL TO TRANSFORMATIVE STRATEGIST

For the new or less experienced practitioner committed to developing as a transformative strategist, the lessons from this chapter also require one to hone two other qualities alongside the increasing strategic effectiveness that Rubin and Rubin (2007) discussed earlier: *persistence and patience*. Of the two, persistence is perhaps easier for organizers, for they tend to be a stubborn lot in the first place. Persistence in holding on to what you believe and consistently working on your internal strategic vision, your core values, and how they find expression in your daily entry-level strategic work are the continuing tasks that lie ahead for anyone seeking to do transformative work. What distinguishes Van Jones and Eric Zachary from others is their commitment to stubbornly pursuing the same values for the same people, even as their work takes different shapes. Anyone seeking such a transformative path can be expected to maintain that same level of persistence in the consecration of their values throughout their lives.

Patience, of course, is another matter. Macro practitioners are rarely patient folks; the desire to change the world has never emanated from people serenely waiting for it to happen. And to advocate here for organizers to do that kind of waiting would be a huge strategic error! The patience here is a further dimension of the tactical self-awareness discussed in Chapters 3 and 4: One gets to use the whole chessboard in a masterful way only by tolerating the often slow, gradual, and humbling manner in which patience emerges. Like the master potter, transformational strategists must work first with the seemingly unyielding clay of their limited experience, only over time growing to realize

the richness that was there all along. For those willing to develop such patience in the persistent search for a better world, such mastery will have been worth the wait.

REFLECTIVE ACTIVITY FOR EDUCATIONAL POLICY 2.1.5

Given this professional standard, with its emphasis on incorporating “social justice in organizations, institutions, and society,” examine your group’s internal strategic vision and delineate in concrete ways how “social justice” and “human rights” appear inside your organization and the way it operates. As much as possible, distinguish actions and behaviors that bring this competency to life.

Social justice and the commitment to human rights appears in our group/campaign/organization through the following:

Who:

What (issues):

How the work is conducted:

How I conduct my work:

Seen through core values consecrated in action:

A SPECIAL ADDENDUM: HISTORY MOVES? THE EMERGENCE OF OCCUPY WALL STREET

What follows is a personal essay I wrote for Occupy Wall Street (OWS) activists during the intense protests surrounding the movement in 2011 and 2012. It contains strategic reflections related to social movement building that build on strategic issues discussed in this chapter.

CRUSTINESS, POP-UP THREATS, AND THE DILEMMAS OF 21ST CENTURY SOCIAL MOVEMENT BUILDING: STRATEGIC REFLECTIONS ON THE HOT-MESS AUTHORITY OF OCCUPY WALL STREET

Introduction

In the summer of 2012, if one traveled to the various encampments known as “Occupy” (Wall Street, Memphis, Oakland, etc., etc.), a casual visitor would not have

been very impressed. For example, in Memphis, encampments contained mostly a group of aging new leftists out of the '60s, a few punk rockers, and some long-term homeless people. Likewise, if one strolled around New York's Union Square Park around 5 p.m. most weekdays, one might be amused but not impressed by much of what seemed to be going on. Right in the center were some crusty folks, complete with sunburned, unwashed faces, sleep-deprived eyes, a tattoo or two dozen, all sitting huddled close together, in part for warmth, in part because they had nowhere else to go. Nearby, there was a table with some snappy black-and-white booklets on anarchism, staffed by an earnest couple dressed in basic black; behind them, in a tight circle, sat eight or nine people from the Think Tank working group, intently discussing the economic and social costs of fracking. They leaned in toward each other, in part because of the three drummers' loud rhythms emanating from a few yards back. A few young people stood taking pictures, excited to be there, anxious to talk to the gray-haired lady with the large peace sign or the old guy dressed as Uncle Sam. A small table held the vestiges of OWS's library, 30-or-so donated books free for the asking; three guys had set up a longer table for the evening meal of rice and beans and veggies. Others milled around, stopping to chat with passers-by.

Not too far away, but as visible as any of the rest, were three police officers standing against a white-and-blue NYPD van. Ten feet farther down were two more, then six more, over by the park's Ghandi statue. An officer, visible because of his white shirt, stood toward the back by the bushes, three more blue shirts next to him. All these police, for not even 200 people? Weeks earlier, back when a few OWS-ers popped back up in Zuccotti Park, the police response had been swift and violent: three male cops dragging down a young woman on the orders of a female white shirt to "get the fuckin' bitch," leaving marks on her neck and bruises on her back still present a week later; another woman soon to become famous because she went into seizure, left to moan and twitch on the ground as officers stood by, doing nothing. Cameras busted, laptops destroyed, wallets and cell phones lost, handcuffs so tight fingers turned numb from the lack of circulation.

To young Occupiers, the increasing harshness of official response to their presence across the country was confusing. How could such a crusty crew evoke such a police presence, and the intimations of more threatening actions? Why had Florida, holder of the Republican Convention that summer, been in such fear of Occupy that they outlawed things such as masks and pieces of string over 6 inches long wherever a public gathering was to be held? People have been marching for the past 40 years at political conventions. Why would New York Police Department teams raid OWS activists' apartments using 3-year-old "open container" warrants as a ruse to search for future demonstration plans, as *The New York Times* reported? Has OWS really been so different from all the other political causes of the previous generation? And if it is different, is it really such a threat to the powers that be?

The short answers to those two questions are (1) yes, at least for a time it was very different, something not seen in the United States for over 30 years, and (2) yes, OWS, in all its hot mess, was seen as a genuine threat to the established order. What follows is an elder organizer's take on why—and the enormous opportunities *and* pitfalls that stand before us.

Part 1: “We Are the 99%!” . . . Occupy!

Everyone knows that the combination of the OWS slogan, “We are the 99%,” and OWS-ers' commitment to nonviolent direct action, including occupation of public spaces, crystallized long pent-up frustrations and anger that unleashed hundreds of Occupy movements across the country. In themselves, however, they neither explain what was different about this mix of ideas and action nor why they have been a perceived threat to established political and economic institutions in ways that make OWS distinct from other campaigns of the past 30-plus years.

To begin, the slogan “We are the 99%” is the first to break through the identity- and issue-based movement activism in more than a generation. With its catchy focus on economic and social inequality, *the slogan has provided a unifying consciousness that gives different kinds of people and distinct issues a coherent target—the 1%—and a degree of similarity of purpose—end economic and political inequality and unfairness—that has not been present in progressive movements since the early 1970s.*

Joined to nonviolent direct action and the retaking of the commons, these messages stood in militant opposition to how political and economic business was conducted. *Things were economically grossly unfair, and the political game to make it “better” was fixed as well.* By willingly living under difficult conditions and the threat of immediate removal by the police, *Occupiers with their powerful slogan established a level of authority to counter dominant elites for the first time since the civil rights and antiwar movements of the 1960s.* It was no accident that OWS authority emerged when Congressional approval ratings were at historic lows and banking and finance leaders were perceived by most Americans as greedy and disinterested in the average working person's standard of living.

This OWS counter-authority has been the grave threat to American political and economic leaders. For as we saw throughout 2011 and 2012, when genuine authority rests within non-elites—all that crustiness and hot mess—the dominant discourse on “who is in charge” and “this is how we do things” is fundamentally transformed—not simply the discourse about the route of a march or how long one can stay in a park *but about everything.* A unifying social movement like the civil rights movement of the 1950s

and '60s became a systemic threat to Southern White supremacy after Rosa Parks stayed seated on that Montgomery, Alabama, bus—along with the ensuing bus boycott engineered by civil rights leader E. M. Nixon. However, that didn't mean there was one huge transit breakdown engineered by African Americans across the South. Instead, there was something much more powerful: *Black people and their White allies stopped believing that the segregationist world order couldn't be changed.* Everyday people began working against a poll tax in one county, eating at lunch counters for “Whites only” in another city, boycotting a national Woolworth's chain, or not putting their heads down when a White person walked by. Rosa Parks's act shifted the consciousness of a people to look to themselves for answers . . . to see that “the way things were” didn't have to extend to *all corners of their lives.*

The violent response (bombings, murders, beatings, daily intimidation) to this shift in African American consciousness that then arose was not over bus rides. It was because the threat that emerged from Southern Black communities targeted the dominant discourse of *who and what mattered*—and the push was a shift away from racial segregation and the social and economic certainties it brought with it. If the only issue had been sitting wherever one wanted on a bus, Montgomery officials would have jumped at the chance. It wasn't.

OWS, while expressed differently 60 years later, has represented the beginnings of the same threat: Discourse that the American economic and political game is just a little unfair doesn't wash anymore. Almost all identity- and issue-based politics, while often militant and at times effective in getting their demands met, could be radical but not transformational: *Get the (sexist, racist, homophobic) rascal or issue out and/or changed, but the rules stay the same; the game is played at the margins of power, by the rules of the system.*

OWS's presence stated loud and clear that it's time to throw out the game, because the rules are a setup. Its slogans and growing counter-authority came from this intransigent belief-in-action that wider and wider sectors of the 99% intuit is accurate about their own lives, too. The ensuing unwillingness not to listen to official authority—*any authority*—in the same way alters not only whether OWS-ers get to stay in Union Square or Zuccotti Park or in downtown Memphis. Throughout society, managers are not listened to in the same way; school officials aren't believed when they say those test scores or school closings are genuine “educational reform”; stop and frisk is at last understood by more and more New Yorkers of every color as a racist program. Black folks and their White allies from around the country wear their hoodies up. The discourse is changing.

The OWS crusties may be a hot mess, but consciousness has been changed because of what they stood for . . . and where. Your mortgage is underwater and you're about to be

evicted? OWS foreclosure groups claim your right to retake your home, and do so. Tired of vertical decision making from elites with no input? Try some of the crisscross mix of horizontalism, where voices are side by side. Can't afford a \$200 meal down at your city's trendy dining area? Have a tasty vegetarian meal, served hot and free, each day at 6 p.m. sharp. Want to read a book? Dance a little? Dream? Over there, in the middle of that hot mess, you can.

Unfortunately, with the increasing clarity that OWS had shifted the dominant discourse at least momentarily from elites, the response of those in charge of "public order" had changed as well. After tactically sensing their error in early response to OWS on the Brooklyn Bridge and the infamous YouTube video of a white shirt Macing three young White women, police were noticeably mild-mannered, even friendly, with the Occupiers at Zuccotti Park. Over time, as it became clear that "Occupy" was about far more than a communal love-in downtown, that began to change—and ended abruptly in the late-night winter clearing of Zuccotti Park, complete with violence and intimidation of the media so that the event would not go viral.

As the brutal arrests suggested, this type of police action can be expected to continue. While it is unlikely ever to reach the level of the officially sanctioned murder seen in the South in the 1950s and '60s, the intimidating presence of the security arm of the 21st century state—from police infiltrators taking names in direct-action planning groups to physically violent arrests to longer and longer periods of incarceration—is going to increase. *Such intimidation serves a clear strategic purpose: It is meant to break the will of OWS activists and threaten the movement's public support in ways that allow for the reassertion of how the game is played*—that the rules are really okay, that elites are smarter and know more and act nicer than those crusty, weird kids down at the local park.

Fifty years ago, the long March to Freedom was filled with far more violence but the same strategic and tactical purposes by governing elites. Popular media portrayed Rosa Parks as just an uppity seamstress whose feet were tired, not an NAACP secretary who'd been trained as an organizer for 10 days at the Highlander Center the year before. Freedom Riders Diane Nash and John Lewis were red-influenced and dangerous radicals, not college-educated, church-going leaders of quiet, unwavering conviction. The Long March to Freedom required courage, commitment, and strategic brilliance to withstand the physical and political assault brought against it. Today's March to Equality will require nothing less.

If we are to march as resolutely and effectively as those who came before us, we also have to pay attention to some strategic dilemmas that they had to overcome—and that we must, too. The second part of this essay focuses on what OWS's strategic dilemmas are, with some modest proposals on how to resolve them.

Part 2. Can OWS Sustain the New Discourse? Strategic Considerations to Maintain OWS's Hot-Mess Authority

Occupy was able to alter the national discourse in 2011 and 2012 because the mix of slogans, forms of activism, and creation of the commons across the country in public parks, vacant lots, and esplanades stood in sharp contrast to the hollow political bargains and entrenched and expanding economic inequality that have marked the past 20 years of what passed for political discourse and debate. The world shifted that late summer day, and the potential for a sustained national social movement was born. That said, the present-day quiescence of OWS around the country suggests that the hard work of political organizing requires more than weekly plans and powerful slogans. Whether or not OWS continues to build a powerful movement and sustains that counter-authority depends on resolving the inevitable strategic tensions that this new social movement building has wrought. I will focus on what I consider six primary tensions.

1. *If OWS responds to every social, economic, and political issue in the world, it will come to stand for nothing.* OWS has responded to a wide variety of social, political, environmental, and economic calls for justice that can be found within the needs and interests of the 99%. I would argue that, strategically, OWS's authority stems primarily from its dual focus on economic inequality and reclaiming public space as a right of the people to their commons. Many issues can fall within this focus: from fracking (a clear economic and environmental risk to everyone) to stop and frisk (with its marginalization and incarceration of young men of color, thus removed from the labor market). OWS's strength has lain in the powerful messages related to student debt, foreclosures, under- and unemployment, tax unfairness, privatizing public space, and (on the political front), the auctioning of elections through Citizens United and the lobbying access of corporations. The underlying coherency of these issues allows different work for different campaigns while staying focused on very, very similar targets. Long-haul success requires those touchstones to be made by a larger and larger audience that over time begins to hear the OWS more clearly. Without that clarity, OWS's authority and arguments stand to be lost in the cacophony of issues and arguments that flood mainstream media and its outlets.

2. *This strategic dilemma is intensified if OWS responses are primarily about what we are against and not what we are for: Does OWS have solutions, demands, and "asks" for the 99% to support in their own work and lives?* There is no question that OWS's early strength came from its focus on solutions rather than narrow demands and as it created a commons for simple, collective exchange. Over the past 30 years, so much activism has been so narrowly focused that it has been refreshing to step away

from short-term solutions and remind people of the long-term depth of inequality that needs to be corrected. At some point, however, OWS will need to coherently point to a way forward that resonates with the conditions and aspirations of that part of the 99% we expect and need to mobilize. Part of the power of the right rests in its dangerously false yet compelling demands for lessened government, free-market growth, and heterosexual, patriarchal families. As I will mention below, some of OWS does have a powerful positive message in its internal work—taking back the commons, creating places safe to play and to disagree, militantly standing up against the tyranny of the growing police state. That said, if OWS does not create equivalent external messages primarily related to economic inequality and political unfairness, the 99% whom Occupiers seek to reach will grow disinterested and disengaged. Not seeking solutions that build campaigns of lasting power is a form of class and racial privilege that OWS does not want to be labeled with.

3. *Militant direct action leading to arrests can be a useful tactic when it serves the strategic purpose of building the movement; when it becomes an end in itself, it undermines the movement's authority.* The world not only watched but responded to the early arrests across the Brooklyn Bridge, in Oakland, and elsewhere as the velvet glove of state power came off. Over the first 6 months, the state's exposed iron fist helped expand OWS's reach as members of the 99% reacted in anger and disgust. However, over time, as has been seen in Oakland, Seattle, and elsewhere, risking arrest in small numbers and publically unrecognized actions depletes OWS of valuable energy, wastes resources, and serves no tactical or strategic advantage. As occurred in the South 60 years ago, creating actions that court arrest must serve the strategic purpose of exposing state power to a wider and wider audience and/or clarify a form of unfairness, immorality, or inequality that draws more and more actors to our movement.

One possibility is mobilizing direct actions that personalize the 1% (or, even better, the .01%) who are involved in intensifying economic inequality and political unfairness. Targeting the homes, businesses, and country clubs of those who fund SuperPacs through vigils, nonviolent direct-action marches, and street theater would be great entertainment, drive the 1% nuts, and, if protesters are arrested, expose whom the state continues to serve—and build OWS ranks accordingly.

4. *OWS must be a movement open to all; it cannot be a sustained social movement equally supported and created by all.* This is a debate as old as the fight for social justice: Can those who suffer most from injustice actually build and lead the social movements needed to combat it? A close read of the history of progressive social movements reveals that they created organizational forms that invited and sustained those extraordinary few who were exemplars of the oppression and the capacity to fight it—without denying that most of the day-to-day work was carried out by educated activists who used the power

and privilege of their skill sets in the cause of social justice. For every Fanny Lu Hamer there were a hundred college and high school graduates like John Lewis and Diane Nash.

This historical fact carries with it the bitter, bracing insight that many of those who have suffered the most social injustice may not always be in a position to effectively fight against it. The multiple hardships of homelessness, underemployment, family stressors, and environmental threats inside and outside the home understandably minimize the numbers who can consistently and strategically engage in the long-term fight to end oppression. This does not mean that the most oppressed are inherently less able, lack insight, or are indifferent to the conditions of their lives. It means they can't go to a lot of meetings, don't have time to read and study what to do next, and can't go out for coffee and reflect on what happened at the last march. It also means that those who are in a position to engage in long-term strategic struggles need to constantly assess their potential to misuse their power and privilege to marginalize those with fewer resources, preventing them from playing a vital role in ways that contribute to movement building: tactical insights, personal strategies of resilience, and pitching in.

5. *Inequitable dynamics of power and privilege are not only found within the 1%; they exist within the 99%—and, unless examined and worked with, within OWS itself.* Awareness of economic inequality and political unfairness is not a guarantee of personal insight regarding one's own misuse of power and privilege. Issues of racism, sexism, classism, homophobia, ableism, and basic elitism have surfaced enough to cause all of us discomfort. As someone who has been engaged in these issues all my adult life, they cannot be adequately addressed either through heartfelt, once-a-month sessions comprising equal doses of guilt and anger or through genuflections of romanticized piety directed at the oppressed. Instead, this work must be the individual and collective responsibility of each Occupier and in each OWS event or action so that OWS can begin to construct a world where diversity—social, intellectual, and personal—is embraced as a fundamental resource. If we are to stand for what distinguishes OWS from the 1% (and those parts of the 99% who are openly racist, sexist, and homophobic), this work must be seen as just as important as any form of direct action.

6. *While OWS champions the 99% in action, its internal workings are designed for far fewer.* In the 1960s and '70s, we called it "participatory democracy," where everyone attending a meeting got to vote and speak on every issue. It came to be known as "hard-ass democracy," as only those with the hardest asses could stay until the middle of the night and thus win all important votes. General Assemblies and other OWS forums that function in a similar fashion relegate almost every working person with a full-time job to a position of potential marginality. While we need to hold on to the value of horizontalism, it needs to be fit within the context of the working lives of potential Occupiers if OWS is to grow and thrive beyond our present numbers.

Concluding comment: the above strategic issues are dilemmas to be worked on together, not roadblocks to success. OWS demonstrated the potential to be the most important progressive social movement in at least 30 years. To realize potential, however, takes the kind of effort people displayed back in its early formations across the country—minus the thrilling rush that comes with any new, close relationship. The next few years are OWS's testing and trusting time—dilemmas replace certainty, fears intertwine with hopes and expectations. But isn't such struggle worthwhile?

THE COMMUNITY TOOLBOX

The following sections from the Community Toolbox (see http://ctb.ku.edu/en/tablecontents/chapter_1010.htm) can be extremely helpful for macro practitioners seeking concrete skills and techniques to mobilize and maintain interest in strategy development.

Choosing Strategies to Promote Community Health and Development

Section 1. Strategies for Community Change and Improvement: An Overview

Section 2. Community (Locality) Development

Section 3. Social Planning and Policy Change

Section 4. Social Action

Section 5. Coalition Building I: Starting a Coalition

Section 6. Coalition Building II: Maintaining a Coalition

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NOTES

1. Please note, I am addressing the use of particular issues not on their merits but as examples of how tactics are used for different strategic purposes within coalitions.
2. In Smock's (2003) work, transformation models refer to those strategies seeking to make wide-scale, societal change. While such groups are part of the above definition, it also applies to groups that may be thinking less about societal change than about broad-scale, long-term issues without a structural, historical analysis attached to them.
3. The following quotations are from an interview conducted with Zachary in June 2009. A fuller description of his training design, organizing efforts, and the results of the program can be found in his doctoral dissertation, "An Exploration of Grassroots Leadership Development: A Case Study of a Training Program's Effort to Integrate Theory and Method" (1998).