

# 12

## Using The Advocacy Spectrum

I . . . present the strong claims of suffering humanity. I . . . place before the Legislature of Massachusetts the condition of the miserable, the desolate, the outcast. I come as the advocate of helpless, forgotten, insane men and women; of beings sunk to a condition from which the unconcerned world would start with real horror.

*Dorothea Dix, social reformer, educator, nurse, advocate for the mentally ill*

Which side are you on?

*Florence Reece, folk songwriter and singer, social activist, union organizer's wife*

### Making Change Happen

Advocacy is the heart of social work. Social workers are advocates. Its part of our ethical code, values, and history and is inherent in almost all practice. As Florence Reece wrote in 1931 in her iconic labor movement anthem *Which Side Are You On?* social work has chosen a side. A part of a social worker's fiduciary responsibility, advocacy, simply defined, is presenting, representing, and supporting a client, group, organization, or cause to others. Advocacy, whether for an individual or a cause, case, or class, means championing, speaking, and acting for the interest of clients or citizens. Social work managers, for example, often promote causes involving service users with officials and decision makers (Donaldson & Shields, 2009; Menefee & Thompson, 1994, p. 18). Advocacy has a role in transforming private troubles into public issues or personal problems into social issues. It has a responsibility in challenging inhumane conditions at a micro or macro level. In direct service work, advocacy is often part of client support and representation and, if possible, involves client self-advocacy. *Case advocacy* emphasizes ensuring service delivery in one's field of practice and securing resources and

services for particular clients in one's caseload (Donaldson & Shields, 2009; Grosser, 1976; Hardina, 1995; Johnson, 1995). *Cause and class advocacy* involves groups, institutions, and modification of social conditions (Donaldson & Shields, 2009; Johnson, 1995).

Donaldson and Shields (2009, p. 90) hold that what separates social work advocacy practice from other advocacy professions is that social work "meaningfully engages and partners with clients and other marginalized groups for social change." It is the partnership, with and not just on behalf of, that distinguishes social work advocacy. This style of advocacy, integral to critical practice, grew from social work's settlement house history of community engagement. As advocacy is a public putting forth of self, assertiveness and critical consciousness are requisites of effective advocacy, and empowerment is a product of successful advocacy.

### Ethics and Values

Our review of the ethical codes of most U.S. and international professional social work associations in Chapter 1 revealed their call for social work advocacy. Case and client advocacy are

inherent in NASW's ethical standard 1.01, *Regarding primacy of client interest* and 1.02, *Calling for client self-determination*. Standard 6.01, *Social and Political Action*, requires social causes be transformed into social and political advocacy to achieve an equitable distribution of social resources for social justice. Chapter 1 also presented the ethical keystones of social work practice.

Social justice is a *sine qua non* of social work's advocacy obligations locally and globally. American social workers are obliged to advocate in social and political arenas to achieve an equitable distribution of the community's physical, economic, and other social resources for social justice under the profession's ethical code (NASW, 2008). Social work has chosen a side. Our values compel us to work to end or at least alleviate acute, chronic, and seemingly unfixable misery.

## Process

Although often associated more with social action, advocacy is generally inherent in most community practice that pursues social justice, from community development (Jacobson, 2007) to social marketing. Advocacy is a change process promoting a client's, a case's, or a community's interests or a cause or ideal that involves directed, purposive, and intentional change. Advocacy change strategies can vary widely, from direct social action and political action through education (Wandersman, Clary, Forbush, Weinberger,

Coyne, & Duffy, 2006) and consciousness raising.

Advocacy and social action are strategies or means to an end. Such strategies are employed by progressive professionals and by a wide variety of concerned citizens (Lewis, 1998) and organizations that vigorously oppose the status quo. Advocacy can be micro, such as self and individual, client and case, and group advocacy, or macro, concerned with institutional and social cause advocacy (Weiss-Gal & Gal, 2009). Cause or class advocacy is a form of social action and may be a part of a social movement. The Birmingham Bus Boycott was class advocacy, social action, and part of the civil rights movement (Willie, 2008). These concepts are similar. The list in Box 12.1, based on Panitch (1974), suggests the variety of techniques used by social workers engaged in advocacy and social reform. In addition, the new communication and information technologies greatly expand the audience for and participants engaged in advocacy (Lohmann & McNutt, 2005; Hick & McNutt, 2002). The major difference is that case or individual advocacy, while often leading to larger social action, is individually focused rather than intentionally seeking larger social change. Class and cause advocacy is social action.

## Social Action and Advocacy

### What is Social Action?

We have defined social action, a subset of community organization, as practices and strategies

### BOX 12.1. Advocacy and Social Action Tactics

1. Build coalitions with other agencies and community organizations, grassroots, Astroturf, false front, Potemkin coalitions (see Chapter 10).
2. Organize client, consumer, and citizen groups.
3. Organize petitions and letter-writing, telephone, e-mail campaigns.
4. Appeal to review boards. Make the targets follow their rules.
5. Threaten or initiate legal action.
6. Threaten and engage in nonviolent direct action and civil disobedience (e.g., boycotts, strikes, sit-ins, rallies, forums, teach-in, pickets, leafleting).
7. Embark on legislative and political action campaigns.
8. Use social marketing, blogging, letters to the editor, talk-show call ins, and public education.
9. Be visible, interesting, persistent, and unpredictable.
10. Whether you win or lose, prepare for the next struggle. You can be sure the other side is.

to change community relations and behavior patterns to promote the development, allocation, redistribution, and control of community statuses and resources, including social power. Social action is a collective endeavor to promote a cause or make a social change in the face of opposition. It usually brings together people who feel aggrieved to take direct action. The critical component is the feeling of being aggrieved, whether or not there is a factual basis for the feeling. Alinsky (1989, pp. 116–117) wrote that the organizer must “stir up the discontent, *rub raw the resentment of the people*, and *fan the latent hostilities*.”<sup>1</sup> The social action mobilizes the discontented, resentful, and hostile and provides a channel to be self-advocates, as well as cause-advocates, to release the discontent, resentment, and hostilities. The social action can be calm but often is disruptive (Ehrenreich, 2009; Perelman, 2009). Whether peaceful or troublesome, the action needs to be carefully staged to capture the public’s and media’s attention. As social action, it has to be visible. Although often claimed by progressives, social action is used by progressives and radical conservatives to promote social change (Barstow 2010; Ehrenreich, 2009; Ferris, 2009; Perelman, 2009).

While social action can be used to address real grievances and injustice, it is built on emotion, feelings, and perception as much as factual and comparative data. Alinsky’s admonitions emphasize emotion. Wallerstein (1993, p. 219) views social action as leading to community empowerment as it “promotes participation of people, who are in positions of perceived and actual powerlessness [*italics added*] towards goals of increased individual and group decision-making and control, equity of resources, and improved quality of life.” For instance, the Tea Party movement (aka Tea Baggers) capitalizes on its adherents’ feeling of loss, deprivation, and resentment. However, polling of adherents in 2010 discovered that “the 18 percent of Americans who identify themselves as Tea Party supporters tend to be Republican, white, male, married and older than 45” (Zernike & Thee-Brenan, 2010, p. A1). They also are more affluent and educated than most Americans (Zernike & Thee-Brenan, 2010, p. A17).

Social action is broader than case advocacy. It is usually more systemic and aims at policy and

community behavior. Social action can entail changing an agency from within, working with mobilized populations, or conducting community-controlled participatory action (Alvarez & Gutierrez, 2001; Wagner, 1990). Human services agencies can engage in social action, although they rarely use disruptive tactics (Donaldson & Shields, 2009).

Social action emphasizes an internal change through consciousness raising and changing as well as the external social change. The internal change is the empowerment and capacity for new social constructions (Butcher, 2007). As discussed in Chapter 2, thought patterns and constructions of reality can encourage or discourage involvement. Part of social action is raising the consciousness—the rubbing raw—of possible action systems. Gamson (1992) has analyzed what facilitates involvement. He describes three collective action frames—injustice, agency, and identity—used by the mind to justify action. The *injustice* component is the moral indignation that is summoned as part of political consciousness. The *agency* component refers to the belief that something can be done and we can do it through collective social action. The belief that we can do something to produce change was reviewed in our Chapter 3 discussion of social problems. The *identity* component creates a mental adversary, a “they”—human agents—who can be affected or turned around, and as agency declares, “we” will prevail.

Social action has been part of social work since the settlement house and social reform era in the United Kingdom and the United States (Herrick & Stuart, 2005; Reisch & Andrews, 2002; Trattner, 1998). We have had the Abbott sisters and Jane Addams. It has been concerned with challenging power-holders because social action promotes insurgency, reform movements, reform, and third-party traditions. Social action has been with us even before Moses. Today, social action manifests itself in media events involving the Tea Baggers, MoveOn.org, and campaigns for all manner of reforms. Social action is used internationally with demonstrations and protests around the world for a variety of causes, from the liberation of Palestine to slowing the pace of corporate and political globalization. Social action is multifaceted, occurring on the streets and on the Internet.

## Recapping Social Action

Social action works to promote change, ranging from reformist, incremental change to radical, fundamental change. It is used by progressives and reactionaries. Generally social action's purpose is to redistribute community resources, especially social power, and social relationships. Tactics embrace social marketing campaigns to educate and raise consciousness about social conditions, coalition building and networking, direct action of coalitions (including public demonstrations, disruption, and nonviolent civil disobedience), and political action. Usually more than one tactic is employed.

**Ensuring Individual Rights.** Advocacy and social action from a progressive standpoint pursue fairness in individual and collective rights. They seek social justice. Sometimes this requires creating new legal rights to ensure a level playing field for everyone. Individuals and groups fighting for their own rights contribute to the rights of all members of the community. Ensuring civil rights and promoting social equality for African-Americans, the civil rights movement, provided the impetus for civil rights and equal opportunity for women and gays. This mode of change influences our practice in many ways. Social workers sometimes help secure or create new rights—such as the right to treatment or to die—and often help implement or enforce existing rights.

The rights we are discussing fall into three categories: (a) due process (a concept of fairness) or procedural rights, (b) substantive rights, and (c) basic human rights. The first two flow from the Bill of Rights (the first 10 amendments to the Constitution of the United States) and other provisions of the Constitution, legislative directives, or court orders. Due process rights require agencies and authorities to play by the rules—to give the process due. Substantive rights are those that apply to everyone (free speech), to those in a certain category (the right to Medicare benefits if criteria are met [Weiss-Gal & Gal, 2009]), or to those in a particular group (e.g., compensation for past discrimination). Some are remedial, such as special education for special needs children. Basic human rights are promoted by the United Nations and include freedom from

arbitrary government restrictions and a right to food. Immigrants lacking citizenship rights have humanitarian appeals rights and a right to human treatment, although these rights are not always honored by nations. Our profession adds client rights to self-determination and participation (Butcher, Banks, Henderson with Robertson, 2007). Since the terrorist attacks of Sept. 11, 2001, in the United States some of these substantive rights have come under attack in the name of patriotism.

Wood and Middleman (1989) make an interesting point with regard to obtaining benefits for an entitled client: “We value the positive experience which people can have as they work together and take action in their own behalf, even if they do not succeed. . . . But when [rights] are at stake, we do not value the psychological experience above task accomplishment. . . . we believe that the positive feelings associated with accordance of one's rights are more real and more lasting, irrespective of the extent to which one has obtained it through one's own efforts” (p. 145). Pressing needs may not wait for empowerment.

Rights won at a societal level on behalf of a class, such as affirmative action, discussed in Chapter 1, are implemented on an individual level. Social work practitioners can *aid individual clients* by informing them of their rights as a class member and monitoring to ensure that their rights are respected in receiving services (Weiss-Gal & Gal, 2009). Simon (1994) warns that it “would be a grave error to assume, without inquiring, that one's client has good knowledge of his or her rights as a citizen and as a consumer of services,” since few of us know our own “rights and entitlements” (p. 20).

## Advocacy Spectrum: Spanning People and Policy

### Along the Spectrum

Advocacy aims to bring about change in order to benefit people in a variety of circumstances. Advocacy ranges from putting forth the interests of oneself, another individual such as a client, to helping a definable group such as a community group or tenants, to a defined community, to social and institutional change to help society and communities now and in the future.

Advocacy can be carried out directly with a client or indirectly on behalf of a client or group or for the public good. An advocate can operate at different points along the advocacy spectrum, or people working in different areas of the same field can address problems simultaneously. The construction of a problem, as discussed in Chapter 3, shapes the advocacy tactics and targets.

Consciousness raising is inherent in all advocacy. It is inherent to empowerment and fundamental to most clinical social work goals. Hyde (1994) believes clinical and social action approaches can be blended since the “caseworker is in an ideal position to help a client begin to consider new life goals. As part of that exploration, the possibility of participation in a macro change effort should be included” (p. 61). Walz and Groze (1991) call for a new breed of clinical activists who might also serve as advocacy researchers; such clinicians would gather data, analyze connections between individual situations and social forces, and measure their success through “multiples” who had been helped (p. 503). Moreau (1990) singles out “unmasking power relations” (p. 56) as pertinent to direct practice—that is, being open with clients about power relationships (Hartman, 1993; Sherman & Wenocur, 1983). The worker will promote

individual awareness and a belief in human agency or instrumentality. Workers and clients, as “co-investigators,” can explore reality, critical thinking, and liberating action (Freire, 1971, p. 97). This Freire style of dialogue involves “reducing unnecessary social distance between worker and client . . . sharing information and demystifying techniques and skills used to help,” according to Moreau; it means that clients can see their files and that no “case conferences concerning them are held without their presence” (Moreau, 1990, pp. 56–57). Many believe that numerous individual transformations contribute to a collective metamorphosis.

Box 12.2 presents a simplified example of how social workers might respond to a question from a service user in accordance with all three philosophies of change.

**Self-advocacy.** Self-advocacy is elemental to any form of advocacy. It involves self-awareness, critical practice, and assertiveness. Without raising one’s own consciousness, it is difficult to raise the consciousness of others. A practitioner who wants to start a client group must believe in the project and his or her ability to carry it out, convince the agency of both, and then bond with group members.

### BOX 12.2. Response Styles

**Client: Why aren’t our benefits higher? We can’t live decently on income way below the poverty level.**

*Conventional responses:*

It’d be nice if they were higher. Can we make a list of your expenses to see if I might have any suggestions to help you make ends meet with the check you receive?

I wish I could get you more money, but we have to work with what we’ve got—given the cutbacks and today’s politics.

(Goal: to avoid being personally blamed, and to express empathy)

*Rights-oriented response:*

Perhaps you aren’t receiving all you are entitled to. Want me to review your finances with you? Maybe we can appeal.

(Goal: to secure rights collaboratively)

*Public interest advocacy response:*

A coalition is trying to influence the governor to supplement the amount the feds provide. Do you want some information about this fight to raise benefits?

(Goal: to involve the client, increase civic skills, and secure the client as a witness or letter writer)

*Transformation or critical consciousness responses:*

What do you think the reason is?

If a family with more money traded places with yours for a week, what would they learn?

Does it ever make you angry?

Who, in your opinion, decides who gets government benefits?

(Goal: to start a dialogue and raise consciousness about income and power distribution, sociopolitical and economic forces)

Maggie Kuhn's story exemplifies self-advocacy. When a certain retirement age was mandatory, traditionally men were given gold watches and some women, including Kuhn, received a sewing machine. Today, mandatory retirement is illegal except in a few circumstances. Kuhn (1991, pp. 130–131) recounts her retirement and her consciousness raising to self-advocacy and empowerment:

In the first month after I was ordered to retire, I felt dazed and suspended. I was hurt and then, as time passed, outraged. . . . Something clicked in my mind and I saw that my problem was not mine alone. Instead of sinking into despair, I did what came most naturally to me: I telephoned some friends and called a meeting. Six of us, all professional women associated with nonprofit social and religious groups, met for lunch. . . . My office at work was next to a Xerox machine, so it was easy to slip over there and whip out copies of a notice for a [large] meeting. . . . We agreed we should all band together to form a new social action organization.

Kuhn founded and headed the Gray Panthers for 25 years, until her death. Her story epitomizes Gutierrez's point: "Empowerment can transform stressful life events through increasing self-efficacy, developing a critical consciousness, developing skills, and involvement with similar others" (1994, pp. 204–205).

Self-advocacy in social work includes self-help and, as with Kuhn, helping others to help themselves. Workers can provide the knowledge and encouragement that clients need to act personally and collectively on their own behalf. A goal of client advocacy is to help the client be an advocate. This can be done through administrative and technical assistance, such as clerical and volunteer help and providing meeting rooms. Practitioners help by offering encouragement, acknowledging the worth of the endeavor, and giving it legitimacy. Another vital support is organizing, again as Kuhn did, by bringing together people concerned with the same issue and sharing information. Self-advocacy also occurs in low-income groups and groups concerned about specific issues such as drunk driving or AIDS. We can learn from self-advocates with organizational skills. We should always be on the lookout not only for indigenous leaders, but also for clients who make progress in self-advocacy in a less public way.

## Individual, Case, and Client Advocacy

NASW's ethical standard 1.01, *Commitment to Clients*, calls for a primacy of client interest by the social worker:

Social workers' primary responsibility is to promote the wellbeing of clients. In general, clients' interests are primary. However, social workers' responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients, and clients should be so advised (NASW, 2008).

Although riddled with caution, the standard's intent is reasonably clear: advocate for the client. Client advocacy means helping clients in self-determination, helping them to obtain their rights within the agency and the community, supporting their empowerment, and raising consciousness. Case advocacy is central to Lee's (1994) empowerment practice: "Empowerment is both the journey and the destination" (p. 207). Case advocacy for the worker entails promoting social justice, raising the consciousness of the client, and teaching and modeling assertiveness and advocacy (Weiss-Gal & Gal, 2009).

Advocacy challenges arise in working with clients who have circumstances that restrain or prevent their desire or ability to act. For these cases client support and advocacy groups are useful. They provide clients with advocacy, emotional support, a recognition that they are not in this alone, and some cover against individual retribution from target systems. "Advocacy in this context becomes a form of personal self-assistance, based on self-identified needs, that unfolds within the context of a very supportive interpersonal relationship with an advocate" (Moxley & Freddolino, 1994, p. 96).

An exciting example of self-advocacy is the growth of the mental health consumer movement. It was started 30 years ago, according to *U.S. News and World Report*, by groups such as Network Against Psychiatric Assault, Mad Pride, and the Insane Liberation Front. "Although it began with a marginalized collection of former mental patients demanding the closure of state hospitals, today it's a national, mainstream movement, representing the entire array of psychiatric diagnoses and challenging psychiatrists and other 'helping professionals'" (Szegedy-Maszak,

**BOX 12.3. Get Me Out Of Here!**

A mother declared her teenage daughter incorrigible and in need of protection by juvenile services. Since the emergency shelter was full, Theresa was placed at a holding facility in a room where unfortunate youngsters stayed until foster homes were available. The matron soon had Theresa babysitting for 10 young children housed at the facility. When the teenager rebelled after a week and refused to babysit, she was locked up behind bars. Her worker was stunned when she came to visit, for there had

been no hearing, nor had she or Theresa's family been contacted. The worker was so indignant that she told her supervisor she wanted to write a letter to the judge in charge of Theresa's case. The supervisor expressed doubt that anything would be done but agreed to humor his young supervisee. The worker wrote a letter to the judge requesting Theresa's release. The teenager was released from her cell the day the judge received it.

2002, p. 55). Thus, individual desires for self-determination led to a collective effort. Today, some formerly homeless, brain-disordered people are employed by or in charge of mental health associations.

*Working With Rather Than For.* Where clients are jailed, ill, or unable to act for themselves, such as the one described in Box 12.3, the advocate honors their expressed wishes and acts on their behalf. When people cannot advocate for themselves or participate jointly in advocacy with the practitioner or the advocacy or support group, the advocate-practitioner must guard against taking a "benefactor" or "liberator" stance (Simon, 1994, p. 7). Client self-determination is a guiding ethic: we want to create situations in which individuals can develop into their own heroes rather than becoming dependent on an advocate-practitioner.

*Advocacy and Respecting the Client.* Individual and family-level case advocacy frequently involves efforts to influence organizational or institutional decisions or policies on behalf of a third party. Once a practitioner agrees to serve as an advocate, he or she cannot countenance or condone having clients demeaned, whether or not the clients are present in an interaction. The ethical principles of respect for and the dignity of clients and the inherent worth of the individual are operational whether or not a client is physically in attendance (NASW, 2008; Weiss-Gal & Gal, 2009). These principles are basic. There are many opportunities to practice them, but they are not easy to follow because so many clients interact with an array of officials who make a

practice of belittling them or treating them as objects. Box 12.4 provides an example of a case-worker's efforts to make the bureaucracy respect the clients' rights.

### Group Advocacy

Group advocacy can arise from case advocacy, it can be part of a particular reform effort, or it can be a component of an ongoing community organization and development process or a social movement. For instance, parents of children who are both physically and mentally challenged and thus cannot use existing group homes might band together to get facilities modified or built to meet their children's needs. The practitioner-advocate's task is help the parents develop consciousness and a collective consciousness and the knowledge and skills to self-advocate. They could make demands of an individual worker or of a county or state agency. In our classification scheme, this is group self-advocacy.

In assessing a problem, we may start with individuals and end up advocating for a group. A social worker troubled that classmates are teasing a boy in speech therapy about his stuttering might talk to his teacher. This same concern, writ large, might lead that advocate to write to a television show that pokes fun at a character who stutters. A worker with a mentally ill client in jail, as a result not of a crime but of his symptoms, should tend to that person's needs but can also note other ill inmates. The worker can then find out what is happening and how to aid such prisoners. Sometimes we work on behalf of people who are scattered and are never seen by each other or the worker, as with the macro advocacy modalities.

**BOX 12.4. Making Them Live up to Their Rules**

An Alinsky (1989) dictum is to make the enemy or target of change live up to his or her own rule book. In California's agricultural counties in the 1960s, it was a general practice to discontinue one-child families from Aid to Needy Children (ANC) during the summer and agriculture harvest months. This practice was rooted in agriculture's need for cheap labor and the assumption that the mothers could fill the need. This was done automatically regardless of childcare arrangements or the mother's ability to find transportation, and contrary to state policy that required childcare plans to be in place before any work-based discontinuance. The county administrators assumed the mothers could find childcare or could take the children to the fields, a common practice before the farm labor union was organized, and ride to the fields, often some distance from the barrios, on the labor contractors' buses. Most public assistance workers disagreed with the practice but felt helpless.

One worker decided to make the county play by the rules. ANC was a federal-state-local program; most of the funds were provided by the federal and state governments but it was run by county administrators. The counties were required to state on the back of all official forms (it was usually in small print) that if clients disagreed with a decision, they could appeal to the state department at

the address provided. The worker dutifully advised all one-child cases, about 60 cases (as caseloads were generally over 100), that in accordance with county policy their ANC aid was to be discontinued from June through September. They could reapply in September. The worker pointed out the clause on the back of the form alerting the clients to their right of appeal and offered suggestive wording.

The state office received almost 200 appeals of the county's policy because the workers and other clients networked with the worker's clients. This was a record number of single-month appeals for any county, and the state did not have sufficient hearing officers. The state, prior to any hearing, requested the county review its policy for compliance. The county did, repealed the policy before the state review, and reinstated the aid until suitable childcare and transportation could be arranged. If the state found the county out of compliance, the state could assume administration of the program at the county's expense and penalize the county.

The county's welfare department director called the worker in for a dressing down and possible disciplinary action. The worker innocently asked what rule he violated by rigorously following procedure? The director was helpless, recommended the worker for a state MSW educational stipend, and sent him on his way.

A practitioner-advocate wants to ensure that maximum benefits are delivered to the greatest number of people, but not at the expense of the original client's position. A client is never sacrificed for the greater good except at the client's urging after fully informed consent. Bringing together many persons who have been harmed in the same way or who seek the same remedy to a common problem helps define the parameters of a problem. Having more people involved increases the availability of information, provides documentation of a pattern of abuse, and aggregates social capital for empowerment. Evidence that 10 apartment building tenants have no heat and hot water is more credible than a similar complaint from a single resident.

Support groups may be empowered by advocating for one of their own. Box 12.11, at end of this chapter, describes the success of a worldwide virtual mental illness discussion group whose

members became advocates for a delusional woman, whom they did not even know personally, who had attempted to pay for coffee with a quarter and a packet of cocoa. Few people participating in support groups have training in advocacy. However, experience teaches support group members, who are willing to go public, to formulate their thoughts carefully. To use our example in Box 12.11, an appropriate statement might be, "This victory on behalf of a mentally ill person who was jailed after not paying properly for a cup of coffee affects all of us with this disease by showing that we can act to help each other and challenge the rigidities of society." Legal immigrants and citizens sharing their ethnic identity may say the same thing about the denial of basic rights to illegal immigrants.

A group may already exist, such as a tenants' organization, or one can form after the advocate starts with one individual and finds others.

In either case, the advocate must get to know each member of the group, understand the group dynamics as the process unfolds, and be accountable to the group, which is equally true in the next situation. Practitioner-advocates often work with groups whose members cannot easily communicate their concerns. The advocate has to work through ethical and authority issues. When representing groups with inarticulate and passive members, all the various sub-interests within the group must be considered; otherwise, only the members who are present and articulate will prevail. The issues presented in Chapter 9 such as interpersonal conflicts and positive allegiances will affect group cohesion and the ultimate agenda for action and must be addressed by the practitioner-advocate. When members want to organize for self-government or to fight discrimination or hardship, the practitioner-advocate must fully inform the group of any potential risks, and then encourage the group's self-determination and follow its lead.

### Community Advocacy

Community advocacy has many facets and bridges the micro and macro advocacy modalities

of the spectrum. Community advocacy requires community consciousness raising and education about tactics challenging the status quo. Community advocacy most often arises from situations that dishearten, disadvantage, aggravate, or harm a segment or segments of a community. The seminal social work example of advocacy occurred in 1889, when Jane Addams and House advocated on behalf of a marginalized neighborhood in West Side Chicago (Addams, 1910) (Box 12.5). It is continued today by the adherents of Alinsky. Community residents can advocate on their own and use non-residential advocates such as social workers. Social workers have an ethical obligation to raise a professional voice on behalf of the unorganized, subgroups, and pressing community needs. Collective advocacy and social action is dealt with in other places in this textbook, along with the methodologies of community assessment, networking, coalition building, bargaining and negotiation, and social marketing; these are all community advocacy tools. Here we discuss what an individual can do to advocate for and with residents of a given community. The La Colonia case in Chapter 1 illustrates community advocacy.

#### **BOX 12.5.** Jane Addams Improves an Alley

We began a systematic investigation of the city system of garbage collection . . . and its possible connection with the death rate in the various wards of the city. . . . Twelve [Woman's Club members] undertook in connection with the residents, to carefully investigate the condition of the alleys. During August and September the substantiated reports of violations of the law sent in from Hull House to the health department were one thousand and thirty-seven. . . . In sheer desperation, the following spring when the city contracts were awarded for the removal of garbage, with the backing of two well-known business men, I put in a bid for the garbage removal of the nineteenth ward. My paper was thrown out on a technicality but the incident induced the mayor to appoint me the garbage inspector of the ward. . . . Perhaps our greatest achievement was the discovery of a pavement eighteen inches under the surface of a narrow street [after the removal of eight inches of garbage]. . . .

Many of the foreign-born women of the ward were much shocked by this abrupt departure into the ways of men, and it took a great deal of explanation to convey the idea even remotely that if it were a womanly task to go about in tenement houses in order to nurse the sick, it might be quite as womanly to go through the same district in order to prevent the breeding of so-called "filth diseases." . . .

The careful inspection, combined with other causes, brought about a great improvement in the cleanliness and comfort of the neighborhood and one happy day, when the death rate of our ward was found to have dropped from third to seventh in the list of city-wards and was so reported to our Woman's Club, the applause which followed recorded the genuine sense of participation in the result, and a public spirit which had "made good."

Source: Addams (1910), pp. 200–205.

Let's consider another case to illustrate rural and urban community advocacy activities (Rankin, 2000). Brookburg, a composite of three actual towns, is a country town of 500 in a county of 12,000 residents. While community-wide advocacy may be needed anywhere, the construction of the community boundaries must consider the community's resources, social capital, and potential social power.<sup>2</sup> Compared to a large metropolitan neighborhood, what can be accomplished in a village with a post office, a cemetery, one gas station, three parks, one combination fire, police, and government hall, two churches, and two restaurants?

Firstly, the advocate might organize events that enhance or sustain the quality of the community. Even small towns surrounded by farms or ranches can have street festivals or fairs that draw people from neighboring areas. Money raised can pay for streetlights and upkeep of parks. Yearly events such as a Halloween parade can draw in rural families. All will help build community consciousness and identity.

Secondly, advocacy often involves efforts to maintain the status quo for a community resisting the tides of modernity. In some areas, there is advocacy for zoning ordinances, for restrictions on development, or for establishing a bypass around the town to keep traffic from destroying the quality of life—or for blocking a bypass to maintain traffic for business. If the Brookburg post office were under threat of relocation, an advocate could try to keep a place where people may see each other and connect. If the Brookburg cemetery were endangered by development, an advocate would explore how to protect the place (Perlman, 2000).

Thirdly, advocates may demand public access to resources. The village of Brookburg is 10 miles from the nearest supermarkets and medical clinics and 50 miles from the nearest city. Some neighborly volunteer projects can help, but transportation needs might require a service plan and appeals to the state government.

Fourthly, advocates strive to become accountable to the community. If residents are increasingly afraid because officials ignored several unusual incidents, accountability is needed. After the beautification association put up new welcome signs, the signs were destroyed. No thorough investigation was conducted and no one was apprehended;

officials wrote it off as a prank. Then a number of mutilated animals were found in empty lots and the parks. It was beyond a prank stage. Yet, when townspeople call Brookburg's part-time officials, they feel they are starting from scratch each time. No cumulative record is kept. In this case, the advocate can document the incidents, go to see officials, establish a reward fund for information, call a town meeting, and consider whether to ask for assistance from outside Brookburg.

All these tactics result in social inclusion that provides community citizens with justice and dignity. Frontline public-sector advocates can be another force for community change. Of course, only practitioners who truly do their jobs and are fearless about repercussions are embraced by citizens as their advocates—as people who place the community before governmental and business interests. This is critical to community practice's belief bonding. Such determination creates local heroes.

Political leaders and elected city officials and managers can serve as, and often are, community advocates. But too often, they are lacking. Michael DiBerardinis, a community organizer who was appointed Philadelphia's Commissioner for the Department of Recreation, is described as a model for officials as advocates. He brought an uncommon commitment to community development and enhanced citizen participation (Perlmutter & Cnaan, 1999).

Community advocacy can spring from case advocacy. Messinger (1982), a social worker and city official, describes the ways in which she provides constituent services: she pinpoints individual advocacy, then empowerment, then community advocacy:

Many people . . . [contact a] politician because they need something done. . . . I or my staff . . . give them an address, make a phone call, track down a check, do whatever is necessary, but we try, always, to notify the people we assist about whom we are calling, what the most useful telephone number is, how they might do the same thing for themselves, and what to do if they do not get help.

Sometimes, too, it is necessary for my staff to intervene to rescue individuals from becoming victims of the system. We recognize that it takes a mass effort by many people to make systems work better, but we do not . . . turn every problem with the bureaucracy into a cause. Nevertheless, we look for patterns in this work

with constituents and for areas in which it is of mutual advantage to organize a lobbying and advocacy force rather than just to give help. (p. 216)

### Public Interest, Political, and Cause Advocacy

Public interest, cause, advocacy, expands the beneficiaries of the advocacy. It involves societal responsibility and “getting a place at the table” for the socially marginalized to enable them to participate in the community’s decision making. Giving voice to the voiceless entails representing general and dispersed, often disorganized, interests (in contrast to concentrated special interests) and underrepresented views. Those interested in keeping public schools strong are dispersed, compared with the parents of children in private and charter schools, who argue collectively for vouchers and subsidies. Middle-class taxpayers seeking tax relief are dispersed, in contrast to the business community with its myriad of national and local lobbying and self-interest associations that secure tax loopholes.<sup>3</sup> Low-income people are the most marginalized by a lack of resources and the most underrepresented in the public debate. Promoting *pro bono* (for the public good) work is important for the poor and for the public. Public interest advocates “strengthen the position of weak, poorly organized, or unarticulated interests in society” (Handler, 1978, p. 4).

Unlike the rights approach, in which an individual may be part of an observable and protected class (such as classes based on gender, race, and so on), many who benefit from public advocacy are part of an indistinguishable public, such as is the case with environmental advocacy. Reform helps current and future publics. Thus, efforts to protect the environment epitomize public interest advocacy.

Public interest advocacy declares to social work: “We have to be public citizens and wherever there is a need we must work to meet it” (Mikulski, 1982, p. 18).

Citizen civic action and democratic policy-making are associated with public interest advocacy. This approach uses:

- Access and investigative methods to force accountability in the private and public sectors (Powers, 1977)
- Community education to develop life skills and civic skills in the populace (Mondros & Wilson, 1994)

While the rights approach often focuses on government wrongs and remedies, the public interest approach challenges corporate abuse as well. Even with the dalliance of Congress and the misuse of the Trouble Asset Relief Program (TARP), corporate executive pay has declined over the past two years in the face of negative public opinion (Leonard, 2010). Three out of five American felt in 2008 that businesses are too powerful and profitable, while almost 80% believed that too much power was in the hands of large corporations (Pew Research Center for the People & the Press, 2008). Executive pay does reflect public opinion, among other variables, and public interest advocacy affects the private sector (Kuhnen & Neissen, 2010). This advocacy—for classes of citizens who can rarely defend their own interests—relies on citizen evaluation, expertise, awareness of pressure points, freedom of information statutes, and the media.

### Political and Policy Advocacy

Public policy and political advocacy offers an opportunity for system change. Political advocacy is practiced across the ideological gamut. Paul Wellstone, the late U.S. Senator from Minnesota, was a one-time community organizer who championed many social work policy issues. He voted his principles about poverty or peace above politics, even if the vote was 99 to 1. Prairie populist Wellstone started out as a tireless, tenacious advocate for rural residents and ordinary people and fought for causes as a political science professor. Just before he died in a plane crash in 2002 (an event that is still contentious), Wellstone risked his re-election to vote against a resolution authorizing force against Iraq. In this way, Wellstone was like social worker Jeannette Rankin (1880–1973) of Montana, the first woman elected to the U.S. Congress, who voted against U.S. entry into both world wars.

Political advocates seek change at any level of government through electoral and political

- Social/legal reform to promote pluralism and to gain an entry to government by strengthening outsider groups (Handler, 1978, p. 4)

processes. For instance, numerous social work advocates have been active in the campaigns of, among others, Georgia Representative John Lewis, social work senators Barbara Mikulski of Maryland and Debbie Stabenow of Michigan, and Senator Ron Wyden of Oregon. The advocates often had worked with the elected official on issues before he or she ran for office. Most maintain their policy commitments after their election. Social workers work in many governmental jobs that involve full-time advocacy, including county commissions, state staff positions, or even legislative directors in the U.S. Senate. Some participate in media and political campaigns that involve field organizing.

Most social work and progressive policy and political advocates, however, are grassroots citizen advocates and not elected officials. Some are “hired guns” or paid political advocates and lobbyists. Increasingly, the advocates run field operations for campaigns, lobby, and create and maintain information and voter databases. Salcido and Manalo (2002) involved social work students in state electoral campaigns in California through “a voter registration drive, an absentee ballot drive, a student rally/forum, and a ‘get-out-the-vote’ drive” (p. 55). In addition, initiative campaigns and campaigns for third-party candidates afford great opportunities to gain political advocacy experience. At any level of government, someone who designs, enacts, defeats, or changes ordinances, acts, regulations, and other policies is a policy advocate.

Some advocates can mobilize whole districts and large populations, educate the base, and form policy proposals. If you are on the e-mail lists of MoveOn.org, Campaign for America, Organizing for America, or one of the emerging Tea Bagger organizations, you know what it is like to be barraged with pleas to contact your legislators on behalf of specific policy positions. If only a small fraction of the list respond, legislators are deluged with policy advocates. While the legislators rarely read the messages, staff do count the positions and view the senders as activists. Policy advocates can prevail despite unfavorable political odds, although the past few years have seen a largely deadlocked Congress. For example, under a Republican administration, policy advocates were successful in convincing Congress to restore funding to community medical centers.

More recently, reactionary policy advocated delayed and weakened health care and financial reform legislation, despite Democratic control of the House, Senate, and Executive branch.

Policy and political advocacy overlap. Politicians make policy. Advocacy involves pressure tactics from giving or withholding financial support to disruption. Advocates on the right and left have used disruptive tactics. A social work professor, students, and other advocates forced a governor to reverse an action he had taken that harmed people with disabilities (Soifer & Singer, 1999). In France, activists held “wild picnics.” Activists from the New Anticapitalist Party protesting both the cost of food by large global food corporations and the government inattention to the plight of workers during the Great Recession set up tables in supermarkets and had picnics from food on the shelves without paying (Perelman, 2009). The Irish have a saying: “You can accomplish more with a kind word and a shillelagh, than you can with just a kind word.”

Policy and political advocates influence decision makers through their constituents and persuasion tactics (e.g., advocacy advertising, field trips to see conditions), knowing that politicians and civil servants may be as concerned with their personal images as with issues.

## Legislative Advocacy and Lobbying

Lobbying’s purpose is to influence policy decision makers. Lobbying can be direct or indirect (Box 12.6). Indirect lobbying involves the staging and social marketing of social ideas by generating public and media support for a position to encourage policymakers to adopt it to maintain their constituency support. Direct lobbying is when lobbyists directly engage and communicate with policymakers.

Lobbyists are professional or civilian, volunteer lobbyists. Professional lobbyists are of three types: hired guns, administrative, and cause.

Hired guns work for a fee based on the amount of time they devote to the contract. They advocate similar to attorneys for their client with legislators, the executive branch, and administrators. They often conduct indirect lobbying using social marketing and “Astroturf” or bogus grass-roots organizations. They do not necessarily

**BOX 12.6. Direct and Indirect Lobbying****Direct Lobbying**

- To legislative bodies
- To legislative committees
- To party platforms
- Political elections
- Agency regulations
- Policymakers at social events
- Key decision makers' staff positions
- Decision makers' information networks
- Political action committees (PACs)
- Agency regulation decision makers

**Indirect Lobbying (Shaping Public Opinion)**

- Influence organization and agency agenda and priorities
- Use of grassroots, client, false-front, Astroturf, Potemkin organizations
- Influencing media: letters to editor, op-ed., TV, call-in talk shows, blogs, chat room postings
- Influencing opinion polls
- Paid advertisements
- Books, pamphlets
- Social marketing and educational campaigns

have a social commitment to their clients or causes, and they have multiple clients. The administrative lobbyist is usually a professional who works for a particular agency, corporation, or association and lobbies exclusively for that organization. The cause advocate lobbies for particular causes or interests. He or she can have a single employer, but the commitment is to the cause.

Regardless of the type, to professional lobbyists, the policy process is a game they play every day. Their value is that they know the policymakers and the other players, have access to and personal relations with policymakers and their staffs, know the thinking of policymakers, and know their way around the policy arena for access and monitoring. Like an attorney advocating for a client, lobbyists will cut deals with other lobbyists and policymakers for support while offering their support to others. The nominal policymakers, legislative committees and executive branches, often merely act as judges to ratify these plea bargains or deals. They also help each other in policy monitoring and often form transient coalitions to pursue mutual interests.

The civilian lobbyist is a nonprofessional lobbyist who lobbies part-time for legislation supportive of grassroots causes. Grassroots relates to a policymaker's constituency. They bring zeal, dedication to the cause, and an appearance of representing the people and the electorate. The popularity of grassroots lobbyists has led professional lobbyists and their clients to create "Astroturf" and "Potemkin" organizations to provide them with a similar aura of populism.

While many civilian lobbyists are quite knowledgeable, a general weakness of civilian lobbyists is a lack of knowledge of the legislative process and players and inadequate time to monitor the process. They often do not have relationships with legislators and staffs to obtain access and information critical for monitoring and projecting actions. They also do not have the perspective on the process and may clog up the works in their belief that their bill is the most important.

The most effective lobbying approach generally is to combine the civilians with strategy and tactics managed by professionals.

Effective lobbying is a year-round job and is done best when done by grassroots activists in the home districts of policymakers. There were in 2009 over 13,694 registered lobbyists in Washington, DC (OpenSecrets.org, 2010). This averages something like 26 registered lobbyists for each legislator. The fundamental resources that lobbyists bring to policymakers, all verbiage aside, in exchange for their policy support are money, time, popular support or voters, and knowledge. Money is the most muscular of the resources in that it is fungible and is used to generate the other resources. The health care industry alone spent over \$250 million in 2009, over \$466,000 per legislator, for lobbying, and overall lobbying from all sources totaled over \$3.45 billion, or over \$6 million per legislator (OpenSecrets.org, 2010). Most progressive civilian or even professional lobbyists can't compete with conservative and reactionary interests on money, so they must develop other resources.

**BOX 12.7. Lobbying the Legislative Process**

- **START EARLY**
- Identify the goal to be achieved.
- Research the issue. Is existing law adequate if properly administered? Is administrative rather than legislative action necessary?
- Build a support coalition. Start indirect lobbying and staging the issue and legislation.
- Learn and know the legislative processes, including leadership, key committees and leadership, legislative calendar.
- Start early with legislators and key committee members in their home districts. In communicating with legislators:
  - \* Be specific. Always identify yourself and your group, especially if you are constituents.
  - \* Know what it means for the legislator, the constituency, the district.
  - \* Be constructive, be courteous, don't threaten (it's implied, and you'll have to deliver).
  - \* Be concise.
  - \* Be persistent.
  - \* Keep in regular contact
- Get a bill introduced pre-session, preferably sponsored by leadership of both parties and the key committee, ideally by respected and effective legislators who are knowledgeable about the issue (or educate them and their staffs). Provide a draft of legislation. Most passed legislation is pre-filed for that session.
- Consider possible support or opposition. Be prepared to promote the idea and provide estimates for cost and anticipated effect.
- Follow the bill in committee. Bills are referred to committee on basis of subject; usually all related bills go to the same committee.
- Lobby the hearing committee, preferably by their constituents; recruit members of your organization who live in their legislative districts. Concentrate your efforts on those legislators who seem undecided rather than strongly in favor or opposed.
- Testify at a committee hearing (see Box 12.8).
- If not favorable reported out of committee with a recommendation to pass the legislation, try to have the bill held over for the following year's legislature.
- Monitor the bill through the session and the governor's approval. The executive will also need to be lobbied.
- Monitor the rules and regulations and implementation processes. Remember, it's not policy until it's implemented.
- If you aren't successful, repeat the process. It can take multiple years to pass legislation.
- Make sure to thank legislators, coalition, and others whenever help is given.

*Resources:* This and Box 12.8 were developed using the authors' professional experience, DeVries and Vanderbilt (1992), Florida PTA (2010), League of Women Voters (1983), Mater (1984), Rubin (1997), and many other Web sites.

Analyze your lobbying successes and failures (Box 12.7). There are more failures than successes. Most legislation introduced never becomes law. Less than a third of introduced legislation in the states passes (Pew Charitable Trusts, 2004). Members of the 110th Congress, 2007–08, introduced nearly 14,000 pieces of legislation but passed only 3.3%, and much of the passed legislation, about 25%, was ceremonial, such as naming post offices, buildings, and recognition days (Singer, 2008). Learn from your successes and failures. Why didn't the bill pass? Was it lost in the logjam of legislation in the final days of the session? Was it killed in committee? Did it make it to a floor vote only to be defeated? To understand why your bill failed, analyze voting records in committee and on the floor. Legislation is generally voted on more than once

in each legislative body, and most of the time authority is separate from appropriations: policymakers often give authority for something without providing the capacity. Killing a bill is easier than passing one.

*Lobbying as Marketing.* Lobbying involves exchange and social marketing, especially indirect lobbying. The theory and discussion of communication is important here. The lobbyist will stage presentations and events to present a visual representation of support for the issue. Staging is important in attracting and holding the public's attention in our short-attention-span era.

Staging frequently uses Potemkin, Astro-turf, and false-front interest groups. Potemkin organizations are hollow organizations that give the impression of representing a large number of

people (broad community interests). False-front organizations are organizations with names that disguise their real interests and convey a positive connotation: for instance, Americans for Prosperity is a corporate-sponsored front organization opposed to public regulation, and FreedomWorks is corporate front bankrolling the Tea Bagger movement. The Coalition for Health Insurance Choices, which sponsored the “Harry and Louise” commercials against the Clinton health care proposals, was solely sponsored by the Health Insurance Association of America. The aim of these types of organizations is make them appear to have broad public interest and support rather than being motivated by narrow economic self-interest. The selection of name should capture the target’s view of the public interest.

An example closer to home has been social work’s efforts to obtain professional licensure social workers. Advocacy coalitions were often formed with names such as “The Coalition for Patients’ Right to Choose.” Usually it was not mentioned that the coalition was almost exclusively composed of social workers and that choice was limited to adding social workers only to the eligible vendors. The name, however, indicated a broad concern for patients’ rights and choice—the public good.

When holding public rallies, forums, and other events, the advocate must consider presentation in terms of where and how to hold the event when policymakers and the media are invited. A rally that no one attends is not a viable influence technique! At legislative hearings and policymakers’ town meetings, cover them, triangulate, and make scattered presentations, and use later presenters to counteract and respond to opposing positions.

Social workers can enter the policymaking process part-time and succeed. Richan (1996), Haynes and Mickelson (2002), the literally thousands of Web sites that can be found available under the search word *lobby* or *lobbyist* (including [www.moveon.org](http://www.moveon.org) and [www.fcnl.org](http://www.fcnl.org)), and this text give ready guidance for beginning social policy advocates.

**Using Clients as Witnesses.** Direct service practitioners, of all the players in the political arena excepting one, are most likely to provide

examples of the suffering that has been or will be caused by social welfare cutbacks and other punitive policy decisions or to find examples of people overcoming or successfully “coping with barriers” (Chapin, 1995, p. 511). That exception is the clients. However, it probably will be traumatic, even in this age of reality TV, for clients to bare their personal lives in a possibly hostile arena. Their impact may not live up to their potential. Many might be not be telegenic or convincing at hearings. To describe their lives in a concise and intriguing manner requires preparation, rehearsal, and role-play. If someone’s privacy is protected with a pseudonym during the initial publicity, advocates must be able to prove the person exists, has the problem in question, and actually will be affected positively or negatively; reporters can check out such stories.

**Protecting Clients and Citizens.** It is unethical and unwise to thrust already vulnerable individuals into public view without first having their trust and permission and providing fully informed consent. Rehearsal and role-play should be done to prepare them to cope with hostility and embarrassment. Clients must be informed of and prepared for the risks inherent in *any* type of advocacy, including testifying. The risks go beyond exposure at hearings and may include retaliation, reduction or loss of benefits, the anger of family members, and anger from the community. Social workers can aid, if not fully protect, witnesses by accompanying them and handling the technical aspects of testifying to allow them simply to tell their stories. Both expert and human-interest witnesses are often prepared for the same hearing. Witnesses should dictate or write their own statements for easy grasp of the facts and easy oral presentation (Box 12.8).

### Structural and System Change Advocacy

Advocacy for structural change is more fundamental in terms of the ends sought, it is more ideologically driven, and it is more revolutionary than is advocacy concerned with an individual’s rights and interests (Ackerman & Alstott, 1999; Fabricant & Burghardt, 1992; Wagner, 1990). It can be promoted by either the political left or

**BOX 12.8. Guidelines for Legislative Testimony**

- Know the legislation and review with sponsors any issues with the legislation.
- Coordinate testimony with sponsors and other coalition advocates to complement but not duplicate other advocates.
- Obtain the fiscal note from the Department of Fiscal Services that estimates the proposed legislation's cost to the state.
- Use the most informed and effective speakers to present testimony.
- Have facts and information well developed and rehearsed. Role-play and rehearse some more. Substantiate and validate your facts with logic, reason, and evidence. Use true personal testimony and cases.
  - Find true stories of real constituencies that relate favorably to the legislation's position. Use cases to stress your issue.
  - Keep it simple; it will be easier to tell and understand.
  - Be specific about what you want.
  - Tell the story in direct, strong, declarative sentences and structure.
  - Don't lie. Avoid hypothetical cases and find real ones.
- If you use statistics and numbers:
  - Put the numbers in human terms: "every man, woman, and child," "Three out of 10 children in your district."
  - Simplify the numbers by using examples of people.
  - Avoid percentages; use ratios such as "2 of 5" rather than "43%."
  - Use numbers sparingly
  - Use a reference or base for numbers dear to the policymakers.
  - Know your numbers and how they were developed. Be prepared to cite your source (ideally more than one).
- When testifying, be thoroughly prepared.
  - Identify yourself and your organization. Mention its location, especially if covers the relevant legislative district. If your organization is small, do not give its size.
  - State your position for or against the proposed bill.
    - First, summarize your recommendations; then, develop each point. Organize your statement clearly and concisely. It is not necessary to make a lengthy, emotional exposition of a situation that needs correcting or a service that is needed; the members have probably heard it all before. Summarize and document your position but don't indulge in overkill. Avoid clichés, wordiness, vague generalities, and undue flattery.
    - If possible, include the costs and savings of the proposed bill.
    - Summarize your position at the end.
- Don't read the testimony. It is more effective to speak directly and forcefully to the committee members and maintain eye contact. Members are more likely to listen attentively and to refer to the written statement later.
- Be confident and cooperative. Committee members want to hear other viewpoints. They have no reason to embarrass or challenge you, but they may ask questions to clarify points you make. Respond directly if you can; if you do not know the answer, say so.
- Use experts only if they are effective speakers. Otherwise, submit the testimony as written testimony.
- Coordinate your testimony with that of other coalition supporters. Schedule, if possible, with the coalition supporter to open testimony and end testimony so that you can rebut the opposition.
- Prepare copies of your testimony and distribute them to the secretary or designated legislative staff person. Many members will not be present at the hearing, so be sure to have sufficient copies. Often others at the hearing will want copies.
- Do not let testimony inhibit other lobbying tactics. Hearings are frequently only show-and-tell exercises.
- If you cannot present oral testimony, send written statements to the committee chair and members.
- Follow up with committee members after the hearing.
- Report back to the coalition, grassroots group, and sponsors, and advise them on the next steps.

right, including faith-oriented networks that work to change the structural causes of poverty and injustice or to make the community a theocracy. The goal is not improving conditions for some, but fundamentally altering the

community's structure. Institutional change implies "widespread and basic alteration" despite strong resistance (Brager, 1967, p. 61). Think of the long fight to overcome tobacco interests and end Jim Crow segregation, and the fight still

going on to provide for adequate health care for all. Many systems affect our clients and society in general, and we want to be able to influence them. Those who would transform themselves and their environment must be able to construct a vision and convince the action and target systems as to how the community can be.

Transformative structural and systems change results in profound alteration or revitalization of society, although overthrow of an existing government or economy is not essential or even sufficient. Governments can change peacefully or violently without the community changing. The American civil rights movement transformed American society. Although not completely successful and at risk of regression, the United States has in 2010 an African-American president and a woman speaker of the House of Representatives, and the last four secretaries of state, America's ambassador to the world, have been a woman, an African-American, or both. These things were only imaginable in 1960 and have become reality thanks to the civil rights movement.

The community in structural change is both the action and target system. Alinsky (1972) says, "History is a relay of revolutions; the torch of idealism is carried by the revolutionary group until this group becomes an establishment, and then quietly the torch is put down to wait until a new revolutionary group picks it up for the next leg" (p. 22). Social work's capacity to carry the torch spotlights the contesting, but not contradictory, social ideologies of service and justice (Van Soest, 1994).

### Systems Advocacy and Change

Individual, state, and national economic investment and boycotts are effective tools for system change. For instance, making socially responsible domestic investments or conducting boycotts can help develop grassroots, community-oriented, and self-help organizations. They were used in the American civil rights struggle and the South African campaign to end apartheid and are being used in the current immigration wars. As part of the advocacy spectrum, we have discussed the political system. However, the insurance system, the medical system, and the media as an institution also affect the average

American. Campaigns are being waged to reform each.

Many attempts have been made and are being made nationally and internationally to transform various societal systems, including the economic system, the patriarchal family system, and gender roles. Community or neighborhood change might be provoked in a year or two, but major challenges to the social order take longer. Individual advocates are important in social movements for change. Imagine the American civil rights movement without Dr. Martin Luther King Jr. or the decades-long struggle to end apartheid in South Africa without Nelson Mandela. Individual actors and action do count, along with group and collective action. Elizabeth Cady Stanton and Susan B. Anthony toiled to abolish slavery, restrict liquor, and obtain property, marriage, and voting rights for women. Mother Jones started organizing coal miners at age 47 and continued for 40 years (Jones, 1980). George Wiley gave up a career as a celebrated chemistry professor at age 33 to fight for the down-and-out in civil rights and welfare rights struggles (Kotz & Kotz, 1977). James Chaney, Andrew Goodman, and Michael Schwerner gave their lives in the Mississippi Freedom Summer of 1964 and became the face of the movement for many young Americans. The first social workers, and early ones such as Harry Hopkins and Frances Perkins, were involved in many progressive battles for change, such as workers' rights, honest government, and Social Security. We have all been rewarded by the actions of these champions and the sacrifices of many unsung heroes. Goodwyn (1978) captures what is important about social movements and change endeavors to the people who are part of them (Box 12.9).

These words describe the aims of many of today's movements and embryo political parties. Today's protestors resist the latest version of a giant industrial engine. The International Monetary Fund and the World Bank, debtors and donors, have been brought to public attention. Globalization and extreme poverty have become part of our public discourse because of the insistence of advocates for systems change.

Large-scale social change endeavors often have tendrils reaching into community advocacy, political advocacy, and systems change.

**BOX 12.9. The Hope of Concerted Action**

[Populism] was, first and most centrally, a cooperative movement that imparted a sense of self-worth to individual people and provided them with the instruments of self-education about the world they lived in. The movement gave them hope—a shared hope—that they were not impersonal victims of a gigantic industrial engine ruled by others but that they were, instead, people who could perform specific political acts of self-determination. . . . the men and women of the agrarian movement [were]

encouraged and enhanced by the sheer drama and power of their massive parades, their huge summer encampments, their far-flung lecturing system. . . . Populism was, at bottom, a movement of ordinary Americans to gain control over their own lives and futures, a massive democratic effort to gain that most central component of human freedom—dignity.

Source: Goodwyn (1978), pp. 196–197

The civil rights and women's movements are good examples (Hahn, 1994; Ryan, 1992). After working for years to achieve political change through suffrage and the Equal Rights Amendment (a failed constitutional amendment), women turned back to their communities and outward to larger systems, seeking other types of equality—in terms of jobs, education, insurance rates, and even public sanction regarding the sharing of domestic chores. After winning important gains in the judicial and legislative areas for years, African-Americans have experienced community setbacks tied to street crime and institutional setbacks tied to standardized testing and persistent incarceration. In short, progress is uneven and is undercut in insidious ways or occurs in unexpected ways; both the attack and the defense interweave multiple advocacy approaches. Yet victories continue. We have ethnic minorities, women, and gays in high elected office where previously they were not allowed.

*Advocacy's Relevance to Direct Practice.* Social workers who are in direct practice, the majority of social workers, have an advocacy obligation. Lee (1994) holds that the role of direct practice is to help clients develop self-advocacy skills by developing self-control, self-efficacy, and a self-construction as victors rather than victims, and assisting them in their empowerment. Practitioners can use their skills to link clients and assist them in making connections through social networks and community organizations. They can similarly encourage participation in the process when a need arises to engage in community intervention. Mondros and Wilson

(1994) make explicit the tie between organizing techniques and direct practice tasks, stating that a “clinician who works with a group of homeless mothers used these techniques to help them organize for repairs and police protection in a park where they frequently took their children. She saw this work as a natural extension of her clinical work with her group” (p. xvii).

The relationship between types of advocacy is clear. Past struggles influence much about our lives today—our work, our legacy. Our professional work frequently pertains to rights and programs that were won earlier through systems reform, which indicates that there truly is “give” in the system. In response to events such as elections, we often feel under siege from those opposed to what we value. Perhaps, though, reading history, we can more appropriately say, “Let’s celebrate” because much has been won by and for progressives and social work. If there is ever any question as to whether we have allies or as to the existence of a flourishing spectrum in action, all we need do is look at the extensive inventory of national liberal advocacy groups.<sup>4</sup> There is, however, an equal list of conservative advocacy organizations.<sup>5</sup>

*Change Modalities Relevant to Direct Service.* Advocacy that melds with direct practice falls into three modalities:

- Ensuring individual rights: pursuing actual delivery of what everyone should have
- Public interest advocacy: participating in society’s decisions and sharing benefits, power, and responsibilities

- Transformation: perceiving the possibility of a better, and profoundly different, society and working to bring it about

All three manifestations of change make members of marginal and invisible groups more central and visible, address social isolation and disenfranchisement, link individuals to social resources and contribute to their social capital, and promote empowerment, confidence, and optimism. Wandersman and his associates (Wandersman, Clary, Forbush, Weinberger, Coyne, & Duffy, 2006), after researching mentoring programs, concluded that they “have the potential to contribute to positive youth development, yet that potential is not always realized (p. 781).” The researchers propose a direct service model that “incorporates roles for both community organizing and advocacy” (p. 789). Pearrow’s (2008) review of urban youth empowerment programs concluded that uniting youths to work together in social action is an essential component of Team Empowerment, and addressed skills development at both the individual and group levels. Engaging in community organizing and critically examining community issues provide young people with the experience, self-efficacy, and social connections to continue to work for community-based change.

**Client Advocate and Practice Roles.** To accomplish the important work of client advocacy, the professional’s work extends from supportive personal advocacy to confrontations to help clients. Advocacy tactics are determined by the involved client or client system’s preferences and the action system’s (clients, agency, community organizations) operational comfort level with tactics ranging from education and consciousness raising to disruption. A task for the advocate-practitioner often is to help the action system expand its comfort level to include the most effective and efficient interventions.

To return to our early example of crowded schools, we can think of many types of advocacy with which to address the problem. The parents could advocate for themselves as taxpayers on behalf of their children. A social worker could write a letter to the board of education or lobby an influential alumnus to call for improvements. A worker could take the concerns of parents

from several schools to the media and help the parents give interviews. A worker could organize a campaign to get local firms to forego their annual holiday parties one year in order to buy textbooks, or could organize parents and neighborhood churches to boycott the school until their demands for improvement are met. A worker could drive a group of parents to meet with their legislator regarding equity in education. A worker could build a coalition to overturn school funding that is based on property taxes.

With an ongoing and complex issue, it is common—though not always necessary—to begin with individual advocacy and progress to institutional change. Consider an addictions worker who counsels individuals and then becomes involved with Mothers Against Drunk Driving (MADD). Initially, the worker helps support the members’ personal feelings and provides community education, and later engages in joint efforts with the organization to secure tough yet humane sentencing. This advocacy finally leads the worker to oppose the advertising of alcohol. Activities along the spectrum can be conducted consecutively or simultaneously. Parts of the spectrum interrelate and the process, even for a single advocate, is dynamic. As the advocate engages in advocacy, consciousness is raised.

Box 12.10 reminds us that client and community advocacy can transpire in ways other than heated controversy. Schneider and Lester (2001) recommend the use of the general practice model when attempting to influence powerful people whose decisions will affect clients:

1. Identify issues and set goals.
2. Get the facts.
3. Plan strategies and tactics.
4. Supply leadership.
5. Get to know decision makers and their staff.
6. Broaden your base of support.
7. Be persistent.
8. Evaluate your advocacy effort.

### Supporting the Spectrum: Job Descriptions and Advocacy Postures

Some workers are hired advocates. Others, like the late Dorothy Height, a social worker and

**BOX 12.10. Advocates Confront Myriad Problems with Clients****Setting: Office of Customer Relations Representative**

*Advocate:* I am a community service worker with the Neighborhood Center. Our office provides assistance in housing and utility issues. This is Mrs. Edna Gardner. We requested an appointment because she received a telephone call stating that her service would be terminated today due to nonpayment of bills.

*Utility Rep:* Yes, I am aware of Mrs. Gardner's bill. (To client) Mrs. Gardner, you are two months in arrears, plus the current bill for June is due. We have received no payment. You did not contact us to say when we could expect payment, so we have no alternative but to discontinue your service.

*Client:* Look, I have three children at home. There has to be another way. Don't turn off the gas.

*Utility Rep:* There is another way. Pay your bills on time like any other good citizen.

*Advocate:* That is exactly why we are here today. To work out an arrangement so Mrs. Gardner can pay her bill. Mrs. Gardner and I have discussed the situation and feel a deferred payment plan might be a solution.

*Utility Rep:* In some situations deferred payment is a solution. When we feel there is a strong likelihood that individuals will live up to their obligations to make installment payments, we agree to such a plan. Quite frankly, Mrs. Gardner, you don't appear to fit into that category.

*Client:* (Angry) What do you mean? I have tried very hard to pay all my bills and it's not easy. Have you ever tried coping as a single parent?

*Advocate:* (To client) Just a minute, Mrs. Gardner. (To utility rep) Let me explain that Mrs. Gardner moved in March, so she did not receive a bill in April. Therefore, her bill in May was over \$175. She did try to explain her inability to pay to your office, but unfortunately a payment agreement was not proposed at that time. Also, Mrs. Gardner had not received written notification that her service was to be terminated and did not realize how serious the situation was until today. Mrs. Gardner is prepared to make an initial payment on her bill right now.

*Utility Rep:* Well, we require at least half of the amount in arrears, which would be approximately \$85 to \$90.

*Advocate:* We are prepared to pay \$60 today.

*Utility Rep:* I just told you we need at least half of the amount in arrears.

*Advocate:* I've worked with your office before, and the policy has been to accept initial payments as low as one-third of that amount.

*Utility Rep:* \$80.

*Advocate:* Let me check with Mrs. Gardner (talks to her quietly, then to the utility rep). \$70 is the most we can pay today, but we'll assure you of three installment payments of approximately \$35 to pay the rest.

*Utility Rep:* How do you expect to make the payments if you can't even come up with \$80?

*Advocate:* We will manage that aspect of our agreement. What we need to do now is put the terms of this agreement in writing, in Mrs. Gardner's file, and issue the stop order on the turnoff.

*Utility Rep:* You'll pay \$70 today and \$35 for 3 months?

*Client:* Yes.

*Utility Rep:* However, since Mrs. Gardner's service was scheduled to be turned off today, the service men are probably at the house now.

*Advocate:* We just mutually agreed to a plan.

*Utility Rep:* Well, it's all right by me, and if we had entered into the plan yesterday or before the truck started on its rounds. . . . Now, once the reconnect charge is paid, our arrangement will go into effect.

*Advocate:* Your company policy has been not to terminate service once a payment plan has been set up. There can't be a reconnect charge either under the circumstances. You must be able to stop the shutoff.

*Utility Rep:* You came too late. There is no way I can reach the men now.

*Advocate:* Someone must have contact with the service truck.

*Utility Rep:* I don't.

*Advocate:* Then let me speak to your supervisor.

*Utility Rep:* You'd like to speak with my supervisor?

*Advocate:* Yes, we would.

*Source:* National Public Law Training Center script in Advocacy Spectrum manual. Some of the material on authority figures is taken from a videotape and manuals by the National Public Law Training Center (NPLTC), a former advocacy training organization. Robert Hoffman and Pat Powers produced the video. George Hacker, William Fry, Barry Greever, Cathy Howell, and Pat Powers, among others, contributed to NPLTC's Advocacy Spectrum training manual. Advocacy Spectrum (n.d.). Manual developed by the National Public Law Training Center, a nonprofit organization. Washington, D.C.

crusader for social justice, undertake advocacy as a professional and personal obligation (Fox, 2010). Like other social workers, like all clinicians, must engage in case advocacy to fulfill their professional obligations. As a social worker commented on a computer bulletin board, while discussing a mistreated patient, "I was developing a pretty strong hankering to do some serious advocacy work here, even though it is not my job as a clinician." To paraphrase Rick (Humphrey Bogart) in *Casablanca*, the clinician was misinformed.<sup>6</sup> Clinicians are case advocates for their clients. Social workers need to act as advocates or obtain more effective advocates, if available.

**Advocate and Ombudsperson.** The advocacy role and the ombudsperson role are frequently confused. An *advocate* pushes the interests of a person, group, community, a point of view, a cause, or a social and political philosophy. An *ombudsperson* serves more as a go-between, an interpreter, and a problem solver, untangling various points of view, and sees if rules, procedures, and contracts are honored. An ombudsperson is not a conventional mediator or alternative dispute resolution player but rather an effective criticizer who tries to "set right" the government system that is "out of gear." The ombudsperson's powers are "to investigate, criticize, recommend, and publicize" (Davis, 1975, p. 286). Advocates most frequently work outside government or the target organization, while ombudspersons normally work as grievance handlers and red-tape cutters within agencies or targets. Ombudspersons often have license to constructively critique their employers, even publicly, although they usually function quietly, providing information, referrals, and complaint resolution. Others in human services, such as patient advocates/ombudspersons in hospitals, creatively combine the seemingly incompatible roles. The important quality is adequate authority, since the job involves questioning professionals about their actions or inactions and ruffling feathers. Tower (1994) argues that client-centered social service agencies should "establish ombudsmen or other client assistance programs to resolve conflicts between the agency and its consumers" (p. 196).

**Internal Advocates** Advocacy can arise inside or outside an agency. An *internal advocate* makes changes for the client through vigilance and intervention inside the agency, using decision-making channels, where possible, and informal influence systems. Schneider and Lester (2001) believe, "Internal advocates can be very effective in carrying out their role of representing the needs of those who cannot speak out or who do not have natural advocates within a service delivery system" (p. 307). More than supervisors' temperaments, the organizational culture may dictate constraints. Tower (1994) urges administrators who care about their clientele to "support and enhance the advocacy efforts of their front-line workers. After all, they are the ones most acutely aware of the client's unmet needs. It is likely that the main reason that more practitioners are not currently involved in consumer movements is fear of repercussion, primarily from their employers" (p. 196).

Mounting a major change effort in a system that serves as one's employer is obviously a challenge. Usually one can rely on some colleagues to help, but it may require "keeping community groups informed of agency developments that go against their community interests" (Galper, 1975, p. 205). We discussed internal advocacy and its perils in Chapter 8.

**Best Interests Versus Stated Wishes of Client.** The question as to whether a practitioner-advocate follows the stated wishes of the client or pursues the client's best interests is more apparent than real. Self-determination and client empowerment argue that a client, not a practitioner-advocate, should decide the client's best interests. Practitioner-advocates are not savants best able to determine the client's best interests. The practitioner-advocate's responsibility is to provide the client with his or her best judgments of the consequences of pursuing the client's wishes. He or she can argue with the client. But a client's capacity to make the decisions is a question for guardians or the courts, not the practitioner-advocate. Clients have the right to self-determination. However, the practitioner-advocate does not have an obligation to assist a client in foolish, unethical, illegal, or self-destructive behavior.

The practitioner-advocate can withdraw from the relationship.

*Conciliatory Versus Adversarial Strategies.* How long to cooperate, coerce, or compromise before becoming adversarial is a critical consideration. Wood and Middleman (1989) warn against escalating too soon on behalf of powerless clients, who, unlike the worker, will suffer the consequences if the action fails. They insist that the roles of broker and mediator must be tried first (p. 142). On the other hand, Patti and Resnick (1972) urge workers who want to change their agencies to consider both collaborative and adversarial strategies, depending on the circumstances. One consideration should be whether or not the target of change is “rational, open to new ideas, and acting in good faith” (Patti & Resnick, 1972, p. 224). We must carefully consider with clients and colleagues whether a combative or a facilitative stance will be most productive in a given situation.

## Key Advocacy Skills

This final section briefly reviews four basic skills used in advocacy processes. They have been discussed elsewhere in this text.

### Basic Skills

*Persuasion.* Persuasion is a key interpersonal skill used in both micro and macro interchanges. It involves promoting, marketing, working for favorable interpretations for a client or a cause, and changing minds (Mondros & Wilson, 1994). Persuasion is part of many practice situations—for example, during program development, case conferences, discharge planning, and many others. It is a pivotal skill in policy situations, which require knowing the pressure points and how to use them (Flynn, 1985). Persuasion can take many forms; an advocate may win a public argument by using a dramatic story that can “unify and energize community and reinforce values and inspire collective action” (Felkins, 2002, p. 50).

As Ezell (2001) states, “Many times the success of advocacy is reduced to one’s ability to

persuade another person in a certain way [using] logic, emotion, or values” (p. 184). Having personal persuasiveness (Burghardt, 1982) and projecting “personal authoritative” (Jansson, 1990, p. 201) combined with a solid command of the facts can be compelling.

Rules of thumb for persuading others are:

- Know what you want.
- Know the facts and have them available.
- Understand your source of power.
- Rehearse, and then rehearse some more.
- Use clear, simple language and visuals.
- Appeal to both emotions and logic.
- Make eye contact if culturally appropriate.

*Representation.* As societal transactions grow increasingly complex, it becomes more difficult for individuals to have the knowledge and capacity to conduct all of their affairs directly. Consequently, most of us need an experienced person to lead us through certain areas. Just as we turn to instructors to teach us first aid or how to drive a car, others request our help to obtain public housing, credit counseling, or union job protection during pregnancy. Representation begins when one person asks another person and the second person agrees to become a spokesperson. To represent someone is to take that person’s view (or to work out a meeting of the minds together), to advocate, while being forthright about the person’s chances and prospects—and when nothing can be done. Adeptness is required in communication, finding out the client’s real wants and needs (his or her construction, not just ours) and educating and motivating the client to become a self-advocate.

Representation often involves a forum such as a meeting or session or assembly (Schenider & Lester, 2001, p. 96) where the advocate and person seeking help together make a case. Non-lawyers can act as authorized representatives, if requested, by an eligible person or recipient for federal programs including Social Security, Medicare, SSI, veterans, and public housing. Here is an example of the type of representation form that is used by some agencies to formalize the relationship.

### AUTHORIZATION AND WAIVER OF CONFIDENTIALITY

To \_\_\_\_\_ [agency]:

This is to notify you that I, \_\_\_\_\_ [client's name], residing at \_\_\_\_\_ [client's address], hereby authorize \_\_\_\_\_ [representative's name] of \_\_\_\_\_ [advocate's agency] to act as my representative regarding \_\_\_\_\_ [program]. You are authorized to release any and all records and information relating to me and/or my case, including confidential information, as my representative may request.

\_\_\_\_\_ [client's signature]

Rules of thumb for representation include:

- Discover and check out what your client wants and how he or she views the need for representation.
- Establish whether someone besides the affected party needs to be involved.
- Assess the need and share your assessment with the client.
- Lay out options and let the client decide the desirable ones and their order of importance.
- Determine the formality of the contract and process.
- Agree upon the division of labor, encouraging the client to increase his or her level of self-advocacy.
- Coordinate with each other and become an action system, guarding against divide-and-conquer tactics.

Allow the client to hire and fire you and celebrate the success of the client's becoming empowered and no longer needing you.

**Negotiation and Bargaining.** Community practitioners negotiate and bargain informally and formally to build networks (as discussed in Chapter 10), on behalf of neighborhoods, programs, and projects, and during issue campaigns. Kahn (1991) uses this definition: "Negotiations occur when the two sides (or three or four) sit down together and try to come up with a resolution that is acceptable, if not completely

satisfactory, to all parties concerned" (p. 175). It is important to know your position and to learn quickly whether the negotiator has decision-making authority. Bargaining is a "process whereby two or more parties attempt to settle what each shall give and take, or perform and receive, in transactions between them" (Rubin & Brown, 1975, p. 2). The major approaches to negotiation are bargaining and problem solving. Negotiation and bargaining are also covered in Chapter 10 and we have included negotiation exercises at the end of chapter.

**Bargaining and Problem Solving.** The negotiation literature on agreement building dichotomizes bargaining and problem-solving approaches. Those who emphasize bargaining (Halpern, 1999; Kolb & Williams, 2000) are more likely to stress control and tactics: where to sit at the table, timing, reading the opposition, and so forth. To know how to bargain during the actual negotiation, negotiators engage intensively with those they represent. Those who emphasize problem solving (Gibelman & Demone, 1990; Sebenius, 2001) are more likely to stress the big picture, understanding, and what-if questions.

Problem solvers work toward reaching a collaborative solution that concludes in a workable agreement. Ideally, each party leaves the negotiation feeling that it has attained something it wanted.

Interest-based negotiation stresses the following elements of a successful, principled negotiation (Field, 2000):

1. *Interests* (each party's needs, desires, concerns, and fears)
2. *Options* (potential solutions parties can take together)
3. *Alternatives* (each party's independent choices)
4. *Criteria* (established standards for legitimacy and fairness)
5. *Communication* (organized thinking, addressing misunderstandings, questioning, listening)
6. *Relationships* (establishing trust, working relationship)
7. *Commitment* (clear, feasible agreements)

*Skills and Rules of Thumb* Reaching a successful negotiated agreement and bargaining is not easy, but the good news is that negotiation is a learnable skill. There is a procedural and psychological process to negotiation—give and take. Kaine (1993) believes that one controls a negotiation by questioning, not arguing. Kaine gives invaluable advice on how to steer negotiations, be clear, and make the other side more receptive: “For example, before making a point, the expert negotiator says, ‘I would like to make a point.’ He then makes his point. He says, ‘May I ask a question?’ and then asks a question. If he has a concern, he will say, ‘I have a concern,’ and then states it. . . . Good negotiators do not label their disagreements. They do not say ‘I disagree with you because . . .’ [They might say] ‘I have this point I would like to discuss with you. It is . . . , and as a result, I disagree’” (p. 40).

In their book on making deals, Gottlieb and Healy (1990) recommend that negotiators prepare to deal effectively with an adversary by doing the following: (1) take an inventory of the adversary’s assets and liabilities; (2) make thorough preparations by knowing the needs of the adversary and his or her end goal; (3) don’t underestimate the amount of strength the adversary possesses in this process; (4) project a belief that your offer is the best available alternative (BATANA), and (5) rely on your expertise as a problem solver. Negotiators should remember they can decide to walk away and should exercise patience and self-control because many concessions take place late, close to a deadline.

To engage in successful negotiation, Gottlieb and Healy (1990, pp. 38–44) also say to:

- Explore possible options and alternatives and closely examine areas of conflict to help establish a creative, problem-solving climate where people collaborate rather than compromise.
- Use “trading off,” the process of sorting, evaluating, and deciding which options would work most effectively for your party and the other side. Be sure and analyze how a trade-off affects the other variables in your equation and what you get for what you give.
- Try to control the pace of communication. Don’t be rushed into agreement. Continually

assert that issues are open until agreement. Issues are interrelated and changes in one will affect the others.

- Maximize your impact as a negotiator by personalizing yourself and the situation.

### Interacting with Authority Figures

An advocate must know how to contend, how to insist, how to negotiate, how to bargain, and how to leave. This means defending and protecting an individual, getting those who have authority and hold power to change their minds or behavior, and holding one’s ground with intimidating people. The requisite is knowing what to do and doing it in the face of opposition.

*Those in Key Positions* Rational/legal authority, as discussed in Chapter 8, is the legitimate power to influence or command thought, opinion, or behavior. A rational/legitimate authority figure is a person in command who has legitimate power to make decisions. Any practitioner-advocate wanting to help others or make changes in a community must deal with authority figures. The way authority holders are dealt with is a major determinant of the results. There need be nothing sinister or malevolent about authority figures. They can exercise discretion. They may mistake authority for power and be intimidating in their bearing, demeanor, or tone of voice. Simon (1994) entreats us to “interrupt contempt” (p. 189). The practitioner-advocate must anticipate a variety of responses from the authority figures involved because each has a different personality.

In negotiating and confronting authority holders, learn what rules and policies a given authority holder is subject to or must abide by, as well as those that he or she controls. Hold the authority holder to his or her rules; if the rules are not followed, get a trade-off. Advocates must know the chain of command in any situation. In bureaucracies, “the power of the advocate is the potential power to escalate the problem, to raise it to higher levels in the hierarchy” (Wood & Middleman, 1989, p. 142). The situation presented in Box 12.10 illustrates this. It also highlights how frequently technical jargon unfamiliar to the layperson is used, whether in a business or

social services agency. Note these other points as well:

- Do not let others shift the burden of responsibility on every point to you.
- Don't assume that a person who has the authority to make a certain decision can decide all things.
- Do not waste time and effort in small talk, trying to appease, ingratiate or bully, or over-explaining or excusing the client's situation.
- Do keep focused.

Years ago, Grosser (1965) argued that advocacy was necessary because arbitrariness and discretion can create an uneven playing field:

Often the institutions with which local residents must deal are not even neutral, much less positively motivated, toward handling the issues brought to them by community groups. In fact, they are frequently overtly negative and hostile, often concealing or distorting information about rules, procedures, and office hours. By their own partisanship . . . they create an atmosphere that demands advocacy on behalf of the poor. . . . If the community worker is to facilitate productive interaction between residents and institutions, it is necessary . . . to provide leadership and resources directed toward eliciting information, arguing the correctness of a position, and challenging the stance of the institution. (p. 18)

While these words are equally relevant today, confrontation is not inevitable. Many situations are resolved amicably. It is important for practitioner-advocates to be aware that those in key positions view their reputations or jobs as being on the line, much as we feel about our clients and our jobs. We should respond to antagonism with firmness. "The impulse to obey authority and the reluctance to confront it are deeply ingrained in the human psyche" (Bell, 1994, p. 136). Transactional analysts might say that many over-adapt and become passive-aggressive. Workers and clients are likely to react similarly to those who have the power to influence outcomes—with awe, avoidance, and anger. Professionals who make themselves interact anyway go on to become effective advocates.

Rules of thumb for dealing with authority include the following:

- Know the system being confronted.
- Know the facts.

- Be ready to demonstrate that you have done your part.
- Know what you want (and BATANA).
- Consider all options about the time, place, and manner of engagement.
- Have materials organized in serviceable fashion for use under pressure.
- Speak in an even tone.
- Listen carefully and take notes.
- Look for a clear decision.

*Virtual Advocacy* Virtual advocacy, or more accurately the use of the Internet to advocate, is a widespread and growing phenomenon. Advocacy groups can rally their supporters to e-mail political policymakers and provide the supporters with links to the decision makers' e-mail boxes. MoveOn.org has used this tactic for what it labels *virtual marches* on Washington and Wall Street, as well as massive e-mail campaigns.

Blogs are posted for any cause, issue, or candidate (Box 12.11). A Google search on April 29, 2010, using the search words *virtual advocacy* generated 3,080,000 sites. Virtual pro-life advocacy produced over 65,000 sites, and prochoice a lesser number of sites, 38,400. The blogs can be used for public education, persuasion, social marketing, developing virtual networks and mailing lists, and rallying and communicating with supporters (Confessore, 2006; Galst, 2009, Wildman, n.d.). It is widely used in political campaigns to generate money (Luo, 2008) and voter support (Lyal, 2010). When combined with Facebook, YouTube, Twitter, and the other networking sites, virtual advocacy has the potential to be powerful. The challenge is to break through the clutter and not become spam or end up at the bottom of the list of sites. This will require a *hit strategy* and links with a variety of other sites.

As Lohmann and McNutt (2005) point out, virtual advocacy has not been rigorously evaluated. It has been used extensively by cause and political organizations. Some claim success for virtual campaigning in fundraising (Luo, 2008), as by the Obama campaign, and in rallying voters (Lyal, 2010). In any case, as with the other components of community practice, it is a crucial skill for advocacy.

**BOX 12.11. Advocacy and Empowerment via Internet**

The schizophrenia discussion group (SCHIZOPH) is an open, unmoderated group composed of approximately 250 individuals at any given point in time. They come from all over the world and their main interest is in discussing about issues related to severe mental illnesses, in particular schizophrenia. The members of this forum are consumers, parents, and professionals from various disciplines . . .

It all started with a simple posting by one member of the group to the listserv.

Are you familiar with the 44-year-old woman with schizophrenia who has broken into David Letterman's house on more than one occasion, and had delusions that she was his wife?

Well, it seems this same woman had a cup of coffee in a diner in Fond Du Lac, Wisconsin, yesterday. She tried to pay her 79-cent bill with a quarter and a package of instant hot cocoa mix. The diner called the police, and they arrested her.

She refused to have her mug shot taken and fingerprints taken because she believes that the government can eliminate her from the human race if they are allowed to take these things from her. She is being held in the city jail until she consents to the photographs and fingerprints.

Pretty big deal over a cup of coffee, I'd say.

This posting generated many responses from the group.

What's the name of the restaurant? I'll send them their money with a (nice) letter attached.

I certainly would write a letter and send the rest of the bill. How much was it?

Hi. Thanks for your words of support and encouragement. The bill was only 79 cents, but I figure if everyone sends the money and a letter, it would

make quite a statement, don't you?

Yes, I think we should send letters and \$.79 to the restaurant and a copy of the letters to the police.

If you call the TV station, you may be able to find out the name of the restaurant. However, it might have a greater impact to send the 79 cents plus letters to the TV station rather than the restaurant, anyway!!!

**I SECOND THAT MOTION!!!**

On Thursday, 20th of March 1997, less than a week after the first posting of the incident, the group got the news that someone was listening to their voice.

That evening the WBAY news carried the whole story explaining what had occurred and had interviews with psychiatrists and others involved. The group felt that they had made their point and affected the community.

The arrest of a woman in North Fond Du Lac last week touched a nerve nationwide . . . Action 2 News has since received numerous letters containing 79 cents—the cost of the coffee—as well as e-mail.

. . . All expressed dismay that someone with a mental illness was arrested for not paying for a cup of coffee. (WBAY News)

The judge in the case decided that the 17 days the person served in jail was adequate punishment and ordered her release. The members of SCHIZOPH were euphoric about the success of their campaign.

*Source:* From "The 79-Cent Campaign: The Use of On-Line Mailing Lists for Electronic Advocacy" (pp. 75–79), by G. M. Menon, 2000, *Journal of Community Practice*, 8(3). Copyright 2000 by *Journal of Community Practice*. Used with permission of Routledge.

**Discussion Exercises**

1. Read the works of Pertschuk (1986), Tower (1994), or Courter (1995) included in the reference list below and discuss the attributes of an individual advocate.
2. George Wiley was admired by social workers who worked with him in the welfare and civil rights movements. His belief was that he should use himself fully. His biographers (Kotz & Kotz, 1977) describe him as:
  - Well organized, energetic, and uninhibited
  - Committed to obtaining information and data

- Able to present information clearly and powerfully
- Able to link diverse, strong-minded allies
- Able to get others involved.

Wiley's biographers portray him as someone who:

- Believed he could convince others—even foes
- Juggled myriad tasks but kept his eye on the target
- Applied heady ideas in practical ways
- Made and kept lists (e.g., resources, contacts)
- Listened well
- Sought out mentors and fundraising help
- Wanted to achieve concrete gains.

*Pick someone you know who is successful at community practice. What traits and skills does he or she have?*

3. Read Bombyk's (1995) *Encyclopedia of Social Work* article on progressive social work. Bombyk challenges us to name a current social worker with a national reputation for championing the interests of underdogs. Who were the past champions?
4. Music is an emotional stimulus—think of *We Shall Overcome* for the civil rights movement and *Joe*

*Hill and Which Side Are You On?* for the labor movement. What songs and music have you incorporated into practice? What songs are appropriate for social justice, gay rights, women's rights, immigrant's rights?

5. As a research project, trace the legislative and advocacy history of the health care reform bills of 2010. Find out the names of the key individual lobbyists (social workers and others) who advocated for the mentally ill. Who was most effective and why?

## Appendix 12.1: Illustrative Exercises

### An Actual Negotiation

Officials finally cracked down on slum landlords. They condemned an apartment building that had hundreds of housing code violations and announced that the owner would receive criminal penalties as well as fines. However, the city insisted that the building had to be emptied for repairs. Community advocates argued the plan was unfair to the tenants who, after living in lousy conditions for years, now would be forced to find scarce affordable housing. The advocates entered into negotiations with city officials,

the owner-landlord, and the owner's lawyer. A compromise was achieved. The building was sold to the tenants for one dollar. Social workers and tenant leaders coordinated the cleanup and rehab of the building. The property owner paid for extensive repairs to the building. He was not jailed but was prohibited from owning any more residential property in the city.

Explain how this example illustrates a win-win negotiation. What leverage was used to achieve this result? Were the advocates negotiating with one, two, or three parties?

### Putting Oneself to the Test

The following scenario will allow you to practice negotiation skills. Decide if you will take a bargaining or a problem-solving approach.

As director of your county mental health program, you have been handed a hot potato assignment. Bordering your headquarters is a parcel of land and a boarded-up county mental hospital, a relic of an earlier era. The county has decided to sell the land and building, with half of the proceeds going to your program's group homes and transitional housing program. Zoning regulations permit the property to be used for a variety of purposes. However, concerns about appropriate uses have been debated for months in the press. The worth of the property has also been the subject of intense speculation. County Council Head Beverly Basey once asserted the land is worth at least \$3 million.

Today, you receive a copy of a fax addressed to the Council from a prospective buyer, Douglas Younger, the head of the Ballet and Modern Dance Academy.

Their organization has unexpectedly received a huge bequest that will enable them to purchase the land and make massive renovations to the building. On behalf of the Academy, Younger offers a total purchase price of \$4 million to be paid in two segments three years apart, plus an annual payment of \$75,000 for 20 years in lieu of property taxes. Since he wishes to immediately launch a capital campaign, Younger concludes:

"I request an immediate meeting with you, Madame Chair, or your authorized designee to negotiate a mutually acceptable purchase agreement, in order that this important project may see fruition."

You get a follow-up e-mail from Chairperson Basey asking you to represent the county in negotiations and to quickly respond to Younger. County lawyers will be involved after you have resolved any initial sticking points.

What should your primary consideration be in preparing to handle the County Council's directive? Are there creative ways to negotiate benefits for your client group?

## Notes

1. These statements apparent has produced the apocryphal task attributed to Alinsky that the organizer-agitator “rubs raw the sores of discontent.”
2. Assets inventory and mapping are discussed in the community assessment chapters.
3. Adam Smith on business: “People of the same trade seldom meet together, even for merriment and diversion, but the conversation ends in a conspiracy against the public, or in some contrivance to raise prices. . . . But though the law cannot hinder people of the same trade from sometimes assembling together, it ought to do nothing to facilitate such assemblies; much less to render them necessary” (Smith, 1922, p. 130).
4. For a list of progressive organizations see: <http://www.startguide.org/orgs/orgs00.html>.
5. For a list of 527s organizations see: <http://www.opensecrets.org/527s/527grps.php>
6. Rick Blaine, café owner: “My health. I came to Casablanca for the waters.” Captain Renault: “The waters? What waters? We’re in the desert.” Rick: “I was misinformed.” *Casablanca* (1942), Michael Curtiz, Director. Warner Brothers Pictures.

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