

THESIS

SPINNING IN CIRCLES: POVERTY ALLEVIATION VENTURES  
IN LARIMER COUNTY, COLORADO

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## ABSTRACT

### SPINNING IN CIRCLES: POVERTY ALLEVIATION VENTURES IN LARIMER COUNTY, COLORADO

Weaving together grounded theory and autoethnography as methodologies, this thesis interrogates two companion antipoverty initiatives in Larimer County, Colorado. The initiatives studied were *Bridges out of Poverty* and the *Circles Campaign*, during the years 2012 and 2013, when they were being piloted locally by funding provided by Bohemian Foundation. Data used in the study include website materials, YouTube videos, notes gathered at public meetings, autoethnographic memos, and artifacts such as tax forms, reports, and other public documents. This study concludes that the initiatives have no reliable efficacy data, reinforce stereotypes, and do not examine root causes of poverty. It is argued that the initiatives are ineffective and dangerous, as they engage in victim blaming and offer the false illusion that poverty is being addressed in our community. Recommendations for the implementation of effective poverty alleviation approaches are given.

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## QUOTATIONS

Our critique should not be limited to focusing on “bad” economic policies or “bad” people, but should primarily target the fundamental structure that generates and needs them both. Otherwise our analysis is limited to pulling leaves off the branches of the problem and not pulling up its roots.

-Willie Baptist & Jan Rehmman, *The Pedagogy of the Poor*, p. 34

It is in the interest of the oppressor to weaken the oppressed still further, to isolate them, to create and deepen rifts among them. This is done by varied means, from the repressive methods of the government bureaucracy to the forms of cultural action with which they manipulate the people by giving them the impression that they are being helped.

-Paulo Freire, *The Pedagogy of the Oppressed*, p. 141

...survival is not an academic skill. It is learning how to stand alone, unpopular and sometimes reviled, and how to make common cause with those other identified as outside the structures, in order to define and seek a world in which we can all flourish. It is learning how to take our differences and make them strengths. For the master's tools will never dismantle the master's house. They may allow us to temporarily beat him at his own game, but they will never enable us to bring about genuine change.

-Audre Lorde, *Feminist Postcolonial Theory: A Reader*, pp. 26-27

## CHAPTER ONE: INTRODUCTION

### **Autoethnographic Voice**

This thesis will examine, describe and explore both *Bridges out of Poverty* and the *Circles Campaign*, implemented as companion antipoverty initiatives in Larimer County, Colorado during a two-year pilot in 2012 and 2013. It will do so from my perspective, the perspective of a community organizer, graduate social work student, researcher, and *Circles Campaign* volunteer. I am writing this thesis using autoethnographical methodology, in which I must demonstrate a “dual role as a member in the social world under study and as a researcher of that world” (Anderson, 2006, p. 384).

The following chapter includes an in-depth discussion of autoethnography, but I thought it important now to let you as the reader know that I will be writing in the first person, and that I will be weaving my personal experience and understanding throughout the analysis. Doing so, I believe, will provide a narrative that is unique in its presentation and transparent in its intention.

### **Background**

The tagline on the cover of *A Framework for Understanding Poverty* describes Ruby Payne (2005) as: “The leading U.S. Expert on the Mindsets of Poverty, Middle Class, and Wealth.” Scanning the back of the book, a discerning eye will notice that it is published by aha! Process, Inc., Payne’s own publishing company (Bohn, 2006). Thus, she is entirely self-credentialed (Gorski, 2008b).

Central to Payne’s (2005) framework is the notion of the “culture of poverty,” which she adopted from anthropologist Oscar Lewis (1959). The paradigm has been harshly criticized and virtually discredited for its victim blaming, deficit orientation (Leacock, 1971; Ryan, 1976; Valentine, 1968). Lewis posited that people in poverty possessed certain traits, such as: “lack of

privacy, gregariousness, a high incidence of alcoholism, frequent resort to violence in the settlement of quarrels, frequent use of physical violence in the training of children, wife beating, early initiation into sex, free unions or consensual marriages...” (1971, p. xxxvii). Lewis also claimed that these traits transcended geographical and temporal boundaries, and he suggested that because people in poverty teach their children these traits, a regenerative process is created (1971). Payne assigned cultural traits to people in poverty which mirror those of Lewis.’ Payne emphasizes that people in poverty have difficulty thinking in the abstract or planning for their future, and that they have the propensity to engage in criminal behavior (2005).

Payne’s work has been soundly critiqued by many in the field of education for lacking data, for advancing an over-simplistic analysis of class structure and poverty, for being deficit oriented and victim blaming, and for harming the children she professes to educate (Bohn, 2006; Bomer, Dworin, May, & Semingson, 2008; Dworin & Bomer, 2008; Gorski, 2011; Osei-Kofi, 2005). Despite these rigorous academic critiques, Payne’s framework seems to be thriving. On her website, Payne proclaims: “We now have more than 100 books and products and deliver training events to tens of thousands of people around the world every year” (aha! Process, Inc., 2014c). Although her focus was originally on education, slight variations to the *Framework for Understanding Poverty* model have extended Payne’s reach to churches, relationships, criminal justice systems, and social service providers (Osei-Kofi, 2005). Business and community counterparts to the Payne framework have gained significant momentum in recent years.

Through *Bridges out of Poverty* (Payne, DeVol, & Smith, 2009), social workers, services providers, and businesses are trained in the “hidden rules” intrinsic in cultures of poverty, middle class and wealth. Payne (2005) defines hidden rules as “the unspoken cues and habits of a group” (p. 7). Presumably, learning those rules can help people in different economic classes

better understand each other. Knowledge of the hidden rules, according to Payne can help people in poverty to rise to middle class or people in middle class to ascend to wealth, should they choose to do so (2005).

### **Researcher's Positionality**

My interest in analyzing the *Bridges out of Poverty* and *Circles Campaign* models is complex and multifaceted. It began with my work as a community organizer in Fort Collins, a Larimer County, Colorado city 60 miles north of Denver. Since 2006, I've been working primarily in low income neighborhoods that are the target of redevelopment or ongoing gentrification. I believe in self-determination and community empowerment; I struggle with the best way to incorporate these two principles into the work that I do, and I constantly search for more effective ways in which to do so.

I was first exposed to the work of Dr. Ruby Payne in 2008, soon after the local nonprofit organization at which I work, (formerly the Center for Justice, Peace and Environment [CJPE]; now the Fort Collins Community Action Network [FCCAN]), produced a film on poverty in Fort Collins. The film, *The Other Side of Suburbia: Poverty in Fort Collins* (Sampson & Farinelli, 2008), was made as a response to a community-wide discussion on poverty. At CJPE, we did not believe that people who were actually living in poverty were adequately represented in that discussion. The film was made by high-school students, and it was well received, with over 200 people at the original screening. However, some larger social service agencies were concerned that it did not emphasize the positive work that was being done in the community. The film was not intended to expose agencies for not doing their jobs properly, nor was it a promotional film about the good work agencies were doing. Rather, it was made to give voice to those actually living in poverty, so that they could be a larger part of the community discussion. After the

screening, one agency requested a copy of the film. When I took it to the executive director, she told me that I really didn't understand the plight of people in poverty, and that I was very likely making things worse; she handed me a book and suggested that I read it. Later that evening, leafing through the book, I was left with a sense of vague unease. For years prior to that, I had been acutely aware of the contradictions inherent in social welfare agencies, service providers, and even larger social justice nonprofits attempting to fulfill their missions in the context of neoliberalism. I was intimately aware of the critique that many service providing agencies exist primarily as an instrument of large corporations and that the "nonprofit industrial complex" often does not allow for the implementation of programs that lead to broad-based social change (INCITE! Women of Color Against Violence, 2007). The book that was given to me by the agency's executive director reflected those contradictions precisely, oversimplifying the lives of those in poverty without seriously examining any root causes. I put it on my bookshelf and thought little of it for almost two years.

In the fall of 2010, I was a fifty-year-old, first-year social work graduate student at Colorado State University. One of my professors, whom I trusted and admired, assigned chapter three of Ruby Payne's (2005) *A Framework for Understanding Poverty*, titled "Hidden Rules Among Classes" along with an academic article comprehensively critiquing Payne's Framework, titled "Pathologizing the Poor: A Framework for Understanding Ruby Payne's Work" (Osei-Kofi, 2005). My reaction to Payne's chapter was guarded, though not immediately negative, and for a brief moment I wondered if there could be some practical value to her model. However, after reading Osei-Kofi's critique, I immediately saw the danger in my response to the enticing quality of Payne's work. Participating in the class discussion that followed led to the beginning of the formation of my own critique. How could Ruby Payne claim that she had studied the

poor, when she had no real data? How could she stereotype so openly? Why were well-intentioned, intelligent people believing her? Why were her ideas so seductive that I was briefly sucked into accepting them?

That evening, as I was typing a reflection for the class, I looked over at my bookshelf, and there it was: *A Framework for Understanding Poverty*, the book that the agency director had given me two years prior. I now had a context for that vague unease that I experienced after first glancing at it. The book was riddled with stereotypes and based on a deficit perspective, and yet it was promoted by the very people who were at the core of our “helping” professions. My rage became despair, as I tried to reconcile those two polarities.

In June of 2011, still in the social work program, I was working as an intern at a clubhouse-model mental health support center. I was asked if I wanted to attend a “Working Bridges” training based on the book *Bridges out of Poverty*. Initially I declined, acknowledging my discomfort with the model. My director encouraged me to attend regardless, because she thought I might benefit from the experience of framing my charged convictions in the context of discussions with other professionals who support the model. I agreed to attend. Reviewing the promotional flier (see Appendix 1), I was quite perplexed about the stated purpose of the training, “...designed to give business and human resource professionals the tools and language to support their company’s success in employing individuals from lower socioeconomic classes...”

Admittedly, I had a bias against Payne’s model going into the training. Nevertheless, I found the Working Bridges model unfathomable. My four take-away points from the training were:

- 1) Companies have developed a position known as “resource coordinator” or “navigator.” This position is a combination human resource officer and social

- worker, and it is put in place to connect low wage workers with income-qualifying state services. (L. Falcone, personal communication, July 21, 2011)
- 2) The only acknowledgement that many workers are not paid a living wage was glossed over with the concurrence that the society at large determines specific wages that workers are paid for specific positions, and so decisions regarding wages are out of the control of both employers and workers. (L. Falcone, personal communication, July 21, 2011)
  - 3) One company noticed that their employees were leaving work to access the local food bank. Their solution was to negotiate with the local food bank to extend their hours. Now their full-time employees, who qualified for the food bank due to their low wages, could access those services without having to leave work. (T. D. Smith, personal communication, July 21, 2011)
  - 4) Micro-loans were given to employees by one company, Rhino Foods (2012), so that their low-wage employees would not be in a crisis due to an unexpected expense, such as a broken hot water heater. Other companies have extended the program to include a savings component, so it became a loan/savings program. Fifty dollars were automatically deducted from qualifying employees' paychecks, and the loan was paid back at 16-18% interest. Once the loan was paid off, the money continued to be deducted until the employee asked for it to stop, and a savings account was established at 1% interest. This was not only justified, but encouraged, because the *Bridges out of Poverty* model claims that because people in poverty can't think in the future or in the abstract, they need to learn the skills of managing money. (L. Falcone, personal communication, July 21, 2011)

After the training, I reflected on its stated purpose from the promotional flyer:

“...designed to give business and human resource professionals the tools and language to support their company's success in employing individuals from lower socioeconomic classes...” I began to wonder if, at some level, the intention, if not the impact, of Working Bridges was to maintain a pool of complacent low-wage workers.

In order to process my discomfort with the *Bridges out of Poverty* model, I spoke to a friend—someone I consider a mentor—who works for a peace and social justice group in a nearby community. She expressed grave concern with Ruby Payne's model, but she did tell me about a method with which she was quite impressed. It was called the *Circles Campaign*. She said that it was the most promising approach to anti-poverty work that she had seen in years. It was relational, and it seemed to address social justice issues while simultaneously helping

individual families. My friend noticed that in using the model, solidarity was formed between middle to high income families with families who were in poverty, and authentic relationships were created. Low-income families who were struggling for years became friends with those who could help them get involved in positive things in the community. One example she cited was the involvement of low income families in community supported agriculture (CSA) programs. Low-income families were able to grow their own food, and they had access to healthy, organic produce. I began to ask others that I knew and trusted about how the *Circles Campaign* was being implemented in other communities, and the responses were overwhelmingly positive. I was intrigued by what the *Circles Campaign* seemed to offer.

In the fall of 2011, I noticed promotional materials regarding the local launch of the *Circles Campaign* in Fort Collins and the larger Larimer County area. Initially optimistic, I was dismayed when I read further and learned that the *Circles Campaign* was in fact being used as a companion initiative to the *Bridges out of Poverty* model in Fort Collins. Yet, I wanted to both dig deeper into the *Bridges* model and learn more about *Circles*, so I went to an informational breakfast at the Fort Collins Area Chamber of Commerce in January of 2012. Additionally, I attended a *Circles Campaign* ally training. The relational aspect of the *Circles Campaign* appealed to me greatly, but it was clearly rooted in the *Bridges out of Poverty* model. I wondered about the extent to which the culture of poverty framework would surface in the individual circles once relationships were formed. I realized that the only way I could fully understand it was to participate in it. I decided to commit to an 18-month “circle” within *Circles Larimer County* in Fort Collins, both because I was interested in working on poverty alleviation and because I wanted to immerse myself in working with the specific model. That commitment, which included attending several community trainings, coincided with a two-year pilot of



*Bridges out of Poverty of Northern Colorado* and *Circles Larimer County*, companion initiatives which were funded by Bohemian Foundation. The autoethnographic component to this thesis is informed by that commitment.

### **Purpose**

According to the Circles USA website accessed in 2014, “Today more than 1,000 community-based organizations in over 70 communities across 23 states and part of Canada are working together to implement Circles” (Circles USA, n.d.-a). These communities are all using the *Circles Campaign* as a means to alleviate poverty. Yet, there is no clear evidence that this program actually alleviates poverty at the community level. In the context of such empirical uncertainty, and considering the fact that the *Circles Campaign* is supported with crucial community resources, it is worth examining whether the *Circles Campaign* desirably affects the poverty rate within a community.

The *Circles Campaign* claims to address individual, structural, and community causes of poverty, but the degree to which each of the three causes are reckoned with in the actual *Circles Campaign* process is not clear. It is worth examining the extent to which the *Circles Campaign* balances its focus on these three causes. Put another way, a key issue is whether the program emphasizes one cause more than another.

### **Rationale**

There are numerous peer-reviewed academic articles and several books that critique the Ruby Payne model. However, the focus of those critiques is on the Payne model’s application to education. Few critiques consider the *Bridges out of Poverty* application to the community or to policy. During the process of this study, a doctoral dissertation was published which was critical of the *Circles Campaign*’s reliance on the *Bridges out of Poverty* framework (Lawless, 2012).

Here I will note that, although Lawless used pseudonyms for the *Circles Campaign* throughout her work, because of my research and interest in the area, I could ascertain that she was, in fact, analyzing the *Circles Campaign*; her appendix materials confirmed that hypothesis (Lawless, 2012).

To date, there has not been any work that has placed an emphasis on interfacing a critique of the community implementation of the *Bridges out of Poverty* model with the *Circles Campaign* claim of “ending poverty in our nation in our lifetime.” This will be the first academic study to do so.

### **Chapter Content**

In the following chapter, I review both the Ruby Payne materials and the academic critiques of them, concluding with my research question. In chapter three, I present the methodology of the study. Chapter four discusses the findings of the study and my analysis of those findings. In chapter five, I submit the conclusions drawn from the study and offer recommendations for the *Circles Campaign*, other poverty alleviation initiatives, activists, and academics based on those conclusions.

## CHAPTER TWO: LITERATURE REVIEW

### Introduction

In reviewing the existing academic literature, I include both the materials that describe and support the Payne model/framework and the *Circles Campaign* as well as scholarly critiques of the Payne model/framework and the culture of poverty paradigm. This chapter concludes with my research question.

### Materials that Describe and Support the Ruby Payne Model/Framework

Because Ruby Payne has no peer-reviewed academic articles, and because she is self-published through aha! Process, Inc., I wondered if it was even appropriate to include her work or related work in this section. However, since her work is being used in institutions of higher education nationwide,<sup>1</sup> I decided to incorporate the work here, not as an acknowledgement of its academic integrity, but rather, as a foundation to better understand the framework. I first focus on what Payne considers to be key points for understanding poverty; then I explore her definition of cultural characteristics and “hidden rules” of people in poverty; finally, I describe the way in which she defines poverty. I then outline the format of the *Circles Campaign*, primarily by exploring Scott Miller’s book, *Until It’s Gone: Ending Poverty in Our Nation in Our Lifetime* (2008). Last, I examine Philip DeVol’s (2004) *Getting Ahead in a Just Gettin’ by World* which, at the time of this study, was used to train leaders in the *Circles Campaign*.

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<sup>1</sup> Nana Osei-Kofi (2005) used the search terms "Ruby Payne" + syllabus + education in when investigating the number of pre-service teacher education schools that were using the Payne model Over 5000 relevant results were generated. On December 2, 2013, the same search terms generated over 8000 results.

## Ruby Payne's "Key Points"

Payne (2005) begins a *Framework for Understanding Poverty* with "12 Key Points to Remember" about poverty:

- 1) Poverty is relative.
- 2) Poverty occurs in all races and in all countries.
- 3) Economic class is a continuous line, not a clear-cut distinction.
- 4) General poverty and situational poverty are different.
- 5) This work is based on patterns. All patterns have exceptions.
- 6) An individual brings with him/her the hidden rules of the class in which he/she was raised.
- 7) Schools and businesses operate from middle-class norms and use the hidden rules of middle class.
- 8) For our students to be successful, we must understand their hidden rules and teach them the rules that will make them successful at school and at work.
- 9) We can neither excuse students nor scold them for not knowing; as educators we must teach them and provide support, insistence, and expectations.
- 10) To move from poverty to middle class or middle class to wealth, an individual must give up relationships for achievement (at least for some period of time).
- 11) Two things that help one move out of poverty are education and relationships.
- 12) Four reasons that one leaves poverty are: It's too painful to stay, a vision or goal, a key relationship, or a special talent or skill. (Payne, 2005, pp. 2-3)

As mentioned earlier, Payne has written and self-published several books with slightly different contexts, marketed to different audiences (Osei-Kofi, 2005). *A Framework for Understanding Poverty* (2005) (hereafter cited as *A Framework*), Payne's first book, is geared towards teachers and school administrators. *Bridges out of Poverty*, co-written by Payne, Terie Dreussi Smith, and Philip DeVol (2009) (hereafter cited as *Bridges*) is intended for use by community professionals and service providers. Payne's key points offer an interesting opportunity to examine the ways in which the content is adjusted for different audiences. When we look at *Bridges*, the "Key Points to Remember" are almost identical to those in *A Framework*, with the exception of what seems to be a simple word processing "find and replace" function, in which "student" from *A Framework* was replaced with "client" or "individual" in *Bridges* (Payne, et al., 2009, pp. 6-8). Point eight in *Bridges* included the addition of "community" so that it

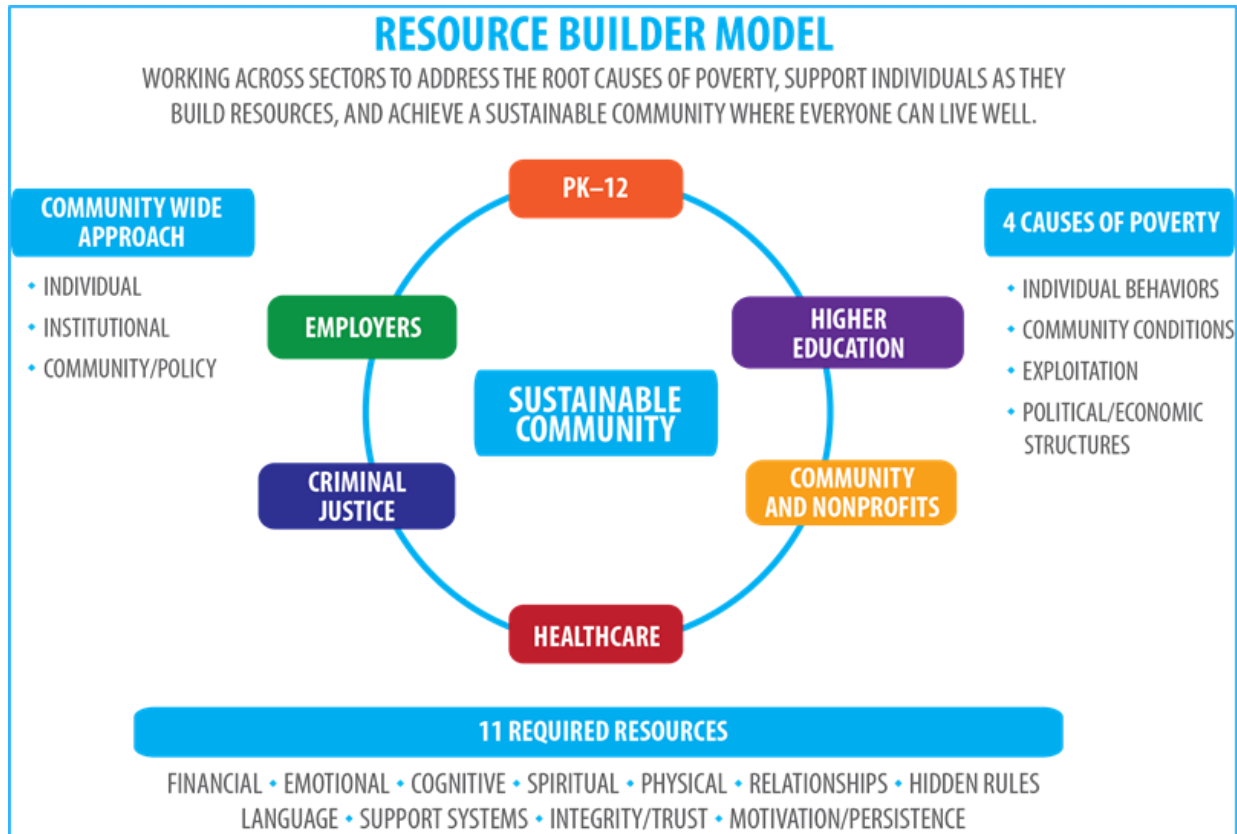
reads: “For our clients to be successful, we must understand their hidden rules and teach them the rules that will make them successful at school, at work, and in the community” (p. 7). Point 11 was replaced entirely in *Bridges* with “We cannot blame the victims of poverty for being in poverty” (p. 8) and point 12 was replaced with, “We cannot continue to support stereotypes and prejudices about the poor” (p. 8). Perhaps Payne was responding to critiques about stereotyping and victim blaming (Bohn, 2006; Bomer, et al., 2008; Dworin & Bomer, 2008; Gorski, 2008b; Osei-Kofi, 2005) by making these adjustments in *Bridges*, yet the 2013 edition of *A Framework* still maintains the essential language in points 11 and 12 (Payne, 2013).

The following chart from the aha! Process, Inc. website (2014b), illustrates how the different versions of aha! Process, Inc. materials are marketed to different audiences:

aha! Process Solutions	Target Audience
A Framework for Understanding Poverty	K-12 Educators
College Achievement Alliance	Higher Education (Faculty and Staff)
Investigations into Economic Class in America	College Students
Bridges out of Poverty	Community Non-Profits Criminal Justice System Government Agencies Healthcare Providers Businesses
Getting Ahead Network	Under-Resourced Adults

**Figure 1: Target Audiences**

This diagram, also found on the aha! Process, Inc. website (2014b), clearly indicates that the model is intended to be used comprehensively, throughout different sectors of society:



**Figure 2: The Payne Model in Different Sectors**

There are a variety of trainings available to communities, which coincide with the above target audiences. Along with education, their “flagship model” (aha! Process, Inc., 2014a), communities can request trainings in the sectors of business, higher education, college students, criminal justice, government, healthcare, community non-profits, and “under-resourced” adults (aha! Process, Inc., 2014a).

**Cultural Characteristics or “Hidden Rules” of Poverty**

Foundational to Payne’s work is the concept of a “culture of poverty,” which was developed by Oscar Lewis over a half of a century ago. I will chronicle Lewis’ work in the next

section, but for purposes of the current discussion, it is important to note that Lewis' paradigm involved cultural characteristics—indeed an entire subculture—of individuals who lived in poverty and taught their children these characteristics, and that this subculture transcended temporal and geographical boundaries (Lewis, 1959). Payne adopted these traits for her model, emphasizing that there are cultural characteristics which we understand as “mental models” not only in poverty, but also in middle class and wealth. The key to advancing from poverty to middle class or from middle class to wealth lies in understanding these mental models and navigating what Payne claims are hidden rules inherent in each class (Payne, 2005). While Payne states that “economic class is a continuous line, not a clear-cut distinction” (2005, p. 2), she repeatedly references characteristics within those three, very distinct classes.

The following chart, which appears in *Bridges* (Payne, et al., 2009, pp. 44-45) illustrates the cultural characteristics or hidden rules that Payne attributes to each of the three classes:

Hidden Rules Among Classes			
	POVERTY	MIDDLE CLASS	WEALTH
POSSESSIONS	People. To be used, spent.	Things. To be managed.	One-of-a-kind objects, legacies, pedigrees. To be conserved, invested.
MONEY	Is for entertainment. Sense of humor is highly valued.	Is for acquisition and stability. Achievement is highly valued.	Is for connections. Financial, political, social connections are highly valued.
PERSONALITY	Social inclusion of people he/she likes.	Emphasis is on self-governance and self-sufficiency.	Emphasis is on social exclusion.
SOCIAL EMPHASIS	Key question: Did you have enough? Quantity important.	Key question: Did you like it? Quality important.	Key question: Was it presented well? Presentation important.
FOOD	Clothing valued for individual style and expression of personality.	Clothing valued for its quality and acceptance into norm of middle class. Label important.	Clothing valued for its artistic sense and expression. Designer important.
CLOTHING	Present most important. Decisions made for moment based on feelings or survival.	Future most important. Decisions made against future ramifications.	Traditions and history most important. Decisions made partially on basis of tradition and decorum.
TIME	Valued and revered as abstract but not as reality.	Crucial for climbing success ladder and making money.	Necessary tradition for making and maintaining connections.
EDUCATION	Believes in fate. Cannot do much to mitigate chance.	Believes in choice. Can change future with good choices now.	Noblesse oblige.
DESTINY	Casual register. Language is about survival.	Formal register. Language is about negotiation.	Formal register. Language is about networking.
LANGUAGE	Tends to be matriarchal.	Tends to be patriarchal.	Depends on who has money.
FAMILY STRUCTURE	Sees world in terms of local setting.	Sees world in terms of national setting.	Sees world in terms of international view.
WORLD VIEW	Love and acceptance conditional, based upon whether individual is liked.	Love and acceptance conditional and based largely upon achievement.	Love and acceptance conditional and related to social standing and connections.
LOVE	Survival, relationships, entertainment.	Work, achievement.	Financial, political, social connections.
DRIVING FORCES	About people and sex.	About situations.	About social faux pas.
HUMOR			

Figure 3: Hidden Rules



In *A Framework*, we are first introduced to those hidden rules in the form of a quiz; we are asked if we could survive in each of the various classes, and we are prompted to check a box next to each item that we are able to navigate in each of the cultures of poverty, middle class or wealth. Some notable examples: In poverty, we can use a knife as scissors, get people out of jail, know where the best dumpsters are; in middle class we can set a table properly, get a library card, use tools in the garage, and sign up our children for little league; in wealth, we have our own airplane, hire decorators for the holidays, are able to read a menu in at least three languages, and have favorite restaurants in different countries in the world (Payne, 2005). Philip DeVol (2004) in *Getting Ahead in a Just-Gettin'-By World*, also published by aha! Process. Inc., cautions us that breaking a hidden rule can be tragic: “You know when you’ve broken a hidden rule when the other person suddenly gets quiet, avoids you, or gives you a funny look—the kind of look, as Ruby Payne says, after ‘something is seen moving in a wastebasket’” (p. 46).

### **Ruby Payne’s Definition of Poverty**

In *A Framework*, Payne (2005) defines poverty as “the extent to which an individual does without resources” and defines those resources as encompassing the following eight categories:

- 1) Financial: having the money to purchase goods and services.
- 2) Emotional: Being able to choose and control emotional responses, particularly to negative situations, without engaging in self-destructive behavior.
- 3) Mental: Having the mental abilities and acquired skills (reading writing, computing) to deal with daily life.
- 4) Spiritual: Believing in divine purpose and guidance.
- 5) Physical: Having physical health and mobility.
- 6) Support Systems: Having friends, family, and backup resources available to access in times of need.
- 7) Relationships/Role Models: having frequent access to adults who are appropriate, who are nurturing to the child, and who do not engage in self destructive behavior.
- 8) Knowledge of the Hidden Rules: Knowing the unspoken cues and habits of a group. (p. 7)

In *Bridges*, there is an additional and necessary resource of “Coping Strategies: being able to engage in procedural self-talk and the mindsets that allow issues to be moved from the concrete to the abstract” (Payne, et al., 2009). In the resources listed on the aha! Process, Inc. website (2014d), Coping Strategies drop off of the list of resources, but the original eight items from *A Framework* are supplemented with: Language, Integrity and Trust, and Motivation/Persistence, for a total of 11 necessary resources.

We are reminded that *Bridges Out of Poverty* is not a program. According to the aha! Process, Inc. website:

- Bridges Out of Poverty is a proven way to counter poverty and its impact on people and businesses in your community.
- Bridges Out of Poverty is a series of best practices, ideas, and concrete tools with proven results that brings people from all economic classes together to address all causes of poverty in order to build resources, improve job retention rates, reduce health inequities, improve outcomes, and support those who are moving out of poverty.
- *Bridges Out of Poverty* is also a book that has inspired many innovative practices. It has developed into an approach that helps employers, community organizations, social service agencies, and individuals (1) build individual assets, (2) build community assets (human and social capital), and (3) acknowledge and reduce exploitation and advocate for political/economic policy change. (aha! Process, Inc., 2014c)

Having reviewed Payne’s hidden rules or cultural traits, definition of poverty, and key factors, we will now look at the *Circles Campaign*. Doing so will give us a clear sight of vision in terms of how *The Framework* is used in community poverty alleviation work.

### ***The Circles Campaign***

This section outlines the structure of the *Circles Campaign* as it functioned when this study began, in January of 2011, and touches on the various changes that the *Circles Campaign* is undergoing. The changing structure and content of the *Circles Campaign* is discussed fully in chapter four.

As the subtitle of *Until It's Gone* indicates, the *Circles Campaign* (hereafter cited as *Circles*) strives not only to reduce poverty, but sees its goal as *Ending Poverty in Our Nation, in Our Lifetime* (Miller, 2008). It should be noted that Circles USA (formally Move the Mountain) is a 501(c)(3) not-for-profit organization, but it utilizes Payne's "hidden rules" of poverty, and *Until It's Gone* is published through aha! Process. Inc. Miller has a decades' long background in poverty alleviation nonprofit work. He asserts that after years of frustration over the lack of comprehensive services to get families all the way out of poverty, he started the *Circles Campaign* (Miller, 2008). He further explains: "Incorporating Dr. Payne's insights into our Circles Campaigns provides Circle leaders and allies a fresh orientation and a new language for more successfully negotiating their new relationships" (2008, p. 7). Miller's background and credentials will be further discussed in chapter four.

*Circles* does not work to implement independent community nonprofit organizations, nor does it foster satellite organizations, but rather it partners with "lead organizations" in various communities, using a franchise model (Ly, 2012). These organizations provide some staff oversight to their local *Circles* initiatives and work closely with Circles USA. They are generally churches, United Way agencies, or existing nonprofits<sup>2</sup> (Circles USA, n.d.-c). In Larimer County, for example, the lead organization for *Circles* is the Education and Life Training Center (ELTC), and it is funded locally by Bohemian Foundation. Bohemian Foundation is one of six national "Innovative Partners" listed on the *Circles* website, although there is no explanation of what that term means (Circles USA, n.d.-f).

A contract is formed between the lead agency and Circles USA. The Circles USA website does not mention the cost that is associated with the arrangement (Circles USA, n.d.-d).

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<sup>2</sup> An exception to this arrangement is Circles New Mexico, which, according to its website is a "project of Circles USA" (Circles New Mexico, n.d.-a).

However, an article posted on the website does state that: “Communities can start and sustain a Circles initiative by raising \$200,000 to \$400,000, and last year the costs for all the sites totaled about \$7 million.... The 190 funders range from national philanthropies, such as the W.K. Kellogg and Bill & Melinda Gates foundations, to local churches and banks” (Ly, 2012, p. 61).

A “circle” is formed when an individual in poverty (known as a leader) is matched with two to four “allies” who are self-identified as middle to upper class. The allies make an 18-month commitment to help the leader out of poverty. The circle meets at least once a month and works on goals of the leader (Circles USA, n.d.-c). Allies are trained in the *Bridges* model prior to being matched with leaders. The training ranges from two to sixteen hours (Lawless, 2012). Once the training is complete, allies and leaders are matched, for their 18-month commitment, which generally averages 4-6 hours a month. At the time they are matched, the leaders have been through their own training (outlined in the next section).

While the leaders and allies meet together formally once a month, the leaders continue to meet weekly throughout the month at the hosting agency. They discuss topics such as financial literacy or “big view” items, which explore structural barriers to getting out of poverty, such as the “cliff effect,” which is the abrupt and disproportionate loss of social service benefits with a slight increase in salary. These monthly meetings include dinner and childcare. The following diagram from *Circles*’ website (Circles USA, n.d.-c), illustrates how the various components come together.



**Figure 4: *Circles*' Organization**

Another crucial component of *Circles* is the guiding coalition, which is built by the lead organization, and comprises staff, allies, and community volunteers (Miller, 2008). The guiding coalition has a leadership role; it functions to ensure that the elements of *Circles* are in place and to fundraise. There is no mention of leaders being members of the guiding coalition on the Circles USA website (Circles USA, n.d.-c) nor is there in *Until It's Gone* (Miller, 2008).

According to Miller (2008), a family can be helped out of poverty when a caring community is formed and when the following steps are created:

- 1) Defining a common vision of ending poverty for everyone to work toward.
- 2) Defining a common language to discuss similarities and differences. We use aha! Process' books and training sessions to teach people about Dr. Payne's "hidden rules of class." Circle allies read and learn from *Bridges Out of Poverty* and Circles leaders use *Getting Ahead in a Just-Getting'[sic]- by World*.
- 3) Defining a shared set of values and principles to guide the healthy development of the community.
- 4) Establishing an atmosphere of permission to use common sense so that people feel free to do whatever is most appropriate to solve particular problems and reach defined goals.

- 5) Holding regularly scheduled meetings to share and learn together. Weekly meeting of Circle leaders include a free meal and childcare to make it easier to attend. (p. 13).

Miller's definition of poverty is inconsistent. In *Until It's Gone*, he defines poverty in a more conventional sense than Payne. Rather than using Payne's (2005) definition of "the extent to which an individual does without resources" (p. 7), Miller (2008) defines poverty as "the inability to consistently pay for the basic needs of food, clothing, shelter, healthcare, transportation, and childcare" (p. 33), and he suggests that the poverty rate is two to three times higher than the 13% that the federal guidelines indicate. However, because the Payne framework is embedded in the *Circles* training materials, her definition is used throughout (Lawless, 2012). Moreover, in a 2011 promotional video, Miller states: "Our definition of poverty is the extent to which you go without resources. How much do you have to cope and manage what you have in order to make it? How much do you give up in terms of the basic needs of food, clothing, and housing and medical care in order to survive?" (Miller, 2011b).

The connection between *Circles* and *Bridges* is addressed on the aha! Process, Inc., website (2014e) as follows:

What is the relationship between Bridges Out of Poverty and the Circles Campaign?

- The Circles Campaign uses the concepts found in Bridges and Getting Ahead, presented in partnership with the publisher, aha! Process, and DeVol & Associates.
- These concepts engage people of all classes, races, sectors, and political persuasions in the work of ending poverty and building communities where everyone can live well.
- Bridges and Getting Ahead provide a common language for guiding coalitions, allies, and circle leaders.
- The application of Bridges and Getting Ahead constructs provides an accurate mental model of poverty and class, a way to build relationships of mutual respect, an understanding of the barriers faced by people who are transitioning out of poverty, and a comprehensive, systemic way to address all the causes of poverty. (para. 1)

Chapter four of this thesis explicates the dynamics of this changing relationship. But for the purposes of the current discussion, it is important to note that *Bridges* and *Circles* were closely connected, companion initiatives in Larimer County during the time at which this study took place, 2012 and 2013.

With that overview of *Circles*, we'll turn now to the work of Philip DeVol, author of *Getting Ahead in a Just-Gettin'-By World* (2004). Doing so will help to guide us in understanding the training that *Circles* leaders undergo prior to being matched in a circle with an ally.

### **Getting Ahead in a Just-Gettin'-By World**

*Getting Ahead in a Just-Gettin'-By-World: Building Your Resources for a Better Life* (hereafter cited as *Getting Ahead*), in addition to being a book, is also offered as one of the aha! Process, Inc. trainings described above. The training can take place independent of the *Circles Campaign*. In a local radio interview, Scott Miller, along with Sarah Hach of the Bohemian Foundation, emphasize that *Circles* came to Fort Collins after *Getting Ahead* trainings were already in place. Bohemian Foundation was actively looking for a next step for *Getting Ahead* graduates (La Rue, 2012).

In the introduction of *Getting Ahead*, DeVol (2004) asserts that after he wrote *Bridges out of Poverty* with Payne and Smith for service providers, he began meeting with people in poverty, and *Getting Ahead* was the result. The book was published in 2004 and revised in 2013. It is, of course, published by aha! Process, Inc. Its target audience, as we have learned, is “under resourced” adults (aha! Process, 2014d).

The book and corresponding training take the participant through ten modules, and a facilitator's guide is available to further guide the process (DeVol, 2013). The chapters are broken down as follows, with chapter overviews for the facilitator:

**Module 1: My Life Now**

The investigators will learn that they are the experts on poverty and near poverty in their community, and that their information is needed by community planners. (p. 59)

**Module 2: Theory of Change**

The information in this module can free people of the tyranny of the moment<sup>3</sup>. This module is about metacognition, about GA investigators taking charge of their thinking. (p. 65)

**Module 3: The Rich/Poor Gap and Research on Causes of Poverty**

This module is one of the most demanding for facilitators. Investigate it along with the group and trust that the learning process will provide the investigators with several ways of looking at their own situations. Help the investigators by asking them, "How does this apply to you?" They will be doing the work of learning and connecting the dots. (p. 73)

**Module 4: Hidden Rules of Economic Class**

Many GA graduates have found great value in the hidden rules. It put into words their cross-class experiences and validated their perceptions. It also gave them the tools for analyzing and then navigating new environments. (p. 89)

**Module 5: The Importance of Language**

Investigators learn nine language concepts that can improve interactions with diverse groups of people by building respectful relationships, resolving conflicts, and exchanging information. (p. 97)

**Module 6: Eleven Resources**

One of the unique features of Getting Ahead and Bridges is the definition of poverty (taken from Ruby Payne): "the extent to which an individual, institution, or community does without resources." (p. 103)

**Module 7: Self-Assessment of Resources**

Now the Getting Ahead investigators consider their own experience, their concrete reality, in light of what they have been learning. (p. 107)

**Module 8: Community Assessment**

In this module Getting Ahead investigators will do two assessments and develop two mental models about the community. One mental model is for the community, while the other is for them. (p. 111)

**Module 9: Building Resources**

Facilitators might think of Getting Ahead as a very large mediation process....this is the module where the concrete strategies for building resources are developed. (p. 117)

**Module 10: Personal Plans and Community Plans**

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<sup>3</sup>In the 2004 edition of *Getting Ahead*, DeVol incorrectly attributes the concept of the "tyranny of the moment" to Paulo Freire. In the 2013 edition, the phrase has no citation.



The planning process itself can be hard work, but it must be done. More exciting are the last two mental models: My Future Story and Community Prosperity. (p. 121)

Participants are usually given a small weekly stipend for attending, averaging \$25; childcare and dinner are provided (Lawless, 2012). Not all communities that use *Getting Ahead* as training for Circle Leaders incorporate all modules, and some communities adapt the modules quite freely in their *Getting Ahead* classes. What is important to note, is that the leaders are taught about the Ruby Payne culture of poverty, hidden rules, and definition of poverty in a training that is generally much more extensive than the allies' training. After both the allies and leaders have been trained, they are introduced and matched up for their 18-month commitment.

With this explanation of the Ruby Payne model and how it is used in *Circles, Bridges*, and *Getting Ahead*, we will turn to academic critiques of the model.

### **Academic Critiques of the Ruby Payne Model/Framework**

In this section, I begin with critiques of Oscar Lewis and the culture of poverty paradigm, which forms the theoretical basis for the Ruby Payne model/framework. Next, I take the reader through the general academic critiques of the Ruby Payne model. Following that examination, we look at the deficit perspective, Payne's reliance on self-publishing, lack of peer review, and use of stereotypes. Finally, we look at how Payne's problematic paradigms surface in *Getting Ahead* and *Circles*.

#### **Oscar Lewis and the Culture of Poverty**

Central to *A Framework* is the concept of the culture of poverty. Because of this, I am going to reach back to the late 1950's, to examine the work of anthropologist Oscar Lewis so I can illustrate where this all began and follow its evolution. I will begin by excerpting the initial explanation of the culture of poverty from *Five Families: Mexican Case Studies in the Culture of*

*Poverty* (Lewis, 1959). Embedded citations are preserved, because I thought it important to maintain Lewis' exact language:

One can speak of the culture of the poor, for it has its own modalities and distinctive social and psychological consequences for its members. It seems to me that the culture of poverty cuts across regional, rural-urban, and even national boundaries. For example, I am impressed by the remarkable similarities in family structure, the nature of kinship ties, the quality of husband-wife and parent-child relations, time orientation, spending patterns, value systems, and the sense of community found in lower-class settlements in London (Zweig 1949, Spinley 1953; Slater and Woodside 1951; Firth 1956; Hoggart 1957), in Puerto Rico (Stycos 1955; Steward 1957), in Mexico City slums and Mexican villages (Lewis 1951, 1952), and among lower class Negroes in the United States. (Lewis, 1959, p. 2)

The excerpt above is the first assertion of any existence of a “culture of poverty.” That is, it is the first time Oscar Lewis published his notion that among the poor, there is a distinct culture that transcends temporal, geographic, ethnic, and rural-urban boundaries.

One of the five families in the book cited above was featured in Lewis' later book *The Children of Sanchez*, in which he further refined the culture of poverty traits:

Some of the social and psychological characteristics include living in crowded quarters, a lack of privacy, gregariousness, a high incidence of alcoholism, frequent resort to violence in the settlement of quarrels, frequent use of physical violence in the training of children, wife beating, early initiation into sex, free unions or consensual marriages, a relatively high incidence of the abandonment of mothers and children, a trend toward mother-centered families and a much greater knowledge of maternal relatives, the predominance of the nuclear family, a strong predisposition to authoritarianism, and a great emphasis upon family solidarity—an ideal only rarely achieved. Other traits include a strong present time orientation with relatively little ability to defer gratification and plan for the future, a sense of resignation and fatalism based upon the realities of their difficult life situations, a belief in male superiority which reaches its crystallization in *machismo* or the cult of masculinity, a corresponding martyr complex among women, and finally, a high tolerance for psychological pathology of all sorts. (Lewis, 1961, pp. xxxvi-xxxvii)

The *Children of Sanchez* was written as a series of biographies, with Jesus Sanchez and each of his children highlighted in a chapter, in which they tell their stories. In Lewis' narrative

framework, this biographical structure allows for both a sense of deep-rooted respect for the stories being told and credibility of those stories. Yet, Melhuus reminds us to be cautious with that interpretation: “The problem, of course, is to define ‘in what sense’ this personal portrait is revealed. In the case of Oscar Lewis, the disclosure lies in what he omits – the questions asked by the anthropologist – and what he presumes – that the subjects are speaking for themselves” (1997, p. 45).

Returning to the refinement of Lewis’ concept, we can see that by 1965 in *La Vida*, he determined the age at which children born into the culture of poverty have suffered irreversible damage: "By the time slum children are aged six or seven, they have usually absorbed the basic values and attitudes of their subculture and are not psychologically geared to take full advantage of the changing conditions or increased opportunities that may occur in their lifetime" (p. xlv).

According to Lewis, the culture of poverty could be eradicated by one of two methods. The first was the implementation of socialism, which would create a social and economic structure that would preclude the circumstances that created culture of poverty. Secondly, the culture of poverty could be overcome by the deployment of psychiatric social workers in the homes of those poor who had succumbed to the culture of poverty (Gans, 1995).

Lewis’ culture of poverty concept was immediately controversial. There were some in the field who embraced Lewis’ model, but as Foley (1997) reminds us they were primarily eugenicists who had formerly believed that poverty was based on inferior heredity. The majority of scholars soundly discredited Lewis’ work on the grounds that it was based on a deficit model; it relied on and perpetuated stereotypes; and it was methodologically flawed (Gans, 1995; Leacock, 1971; Rodman, 1977; Ryan, 1976; Valentine, 1968). Moreover, Able and Lyon (1979) conducted an empirical evaluation of the culture of poverty concept in which they determined

that “cultural behaviors were not the primary factors in the perpetuation of economic poverty” (p. 616).

Regardless of these critiques, Lewis’ work provided the back drop for a grab bag of bipartisan U.S. policy that was damaging to the poor. Conservatives used his paradigm to justify their position that the poor were lazy and undeserving. Liberals embraced policy that emphasized a dependency relationship between the poor and the state. They now had a justification for racist and classist legislation cloaked in the pretense of good intention (Foley, 1997; Gans, 1995).

Early politicization of the culture of poverty model was swift. One need look no further than Michael Harrington’s *The Other America* (1962), frequently credited for precipitating the War on Poverty, to understand how those on the left—those who professed to be advocates for the downtrodden—were easily seduced by the culture of poverty paradigm, which shifted blame away from existing social structures, and by association, away from those who benefited from them. As Barbara Ehrenreich (2012) points out, Harrington’s work provided the mainstream reader with the experience of “discovering” the poor in much the same way Columbus “discovered” America, and he did so by interminably “othering” those in poverty by focusing on their “unique culture.”

Lyndon B. Johnson’s Assistant Secretary of Labor, Daniel Patrick Moynihan, published a report in 1965 entitled, *The Negro Family: The Case For National Action*. Frequently referred to as the *Moynihan Report*, it is a manifesto denouncing the African American family, who Moynihan described as dependent on welfare, headed by an inept matriarch, and cloaked by pathology. Although Oscar Lewis is never directly referenced in the *Moynihan Report*, his influence is unmistakable (Briggs, 2002). Crenshaw (1989) summarized the *Moynihan Report*

by stating that it “depicted a deteriorating Black family, foretold the destruction of the Black male householder and lamented the creation of the Black matriarch” (p. 163). Additionally, Crenshaw exposes the report’s androcentric, patriarchal theme: “Surprisingly, while many critics characterized the report as racist for its blind use of white cultural norms as the standard for evaluating Black families, few pointed out the sexism apparent in Moynihan’s labeling Black women as pathological for their failure to live up to a white female standard of motherhood” (p. 163).

The implementation of the war on poverty included the early childhood programs *Project Follow Through*, and *Head Start* (Dudley-Marling, 2007). While the importance of these programs cannot be disputed, the lens they utilize is frequently problematic, and can be traced to Lewis’ culture of poverty. As Ladson-Billings (1999) argues:

It is clear that they rest on a foundation of cultural and social inferiority. It is important that the preceding statement not be interpreted as support for the abolition of such programs. Rather, it might be used to understand why such programs produce limited success in the school setting. If we begin with the notion that some children lack "essential" qualities deemed necessary for school success, how is it that schools can correct or compensate for those missing qualities? Some of these programs have imbedded in their premises a conception of children coming from families that are inadequate, and thus the role of the school (or the state) is to remove children from such families as soon as possible to "compensate" for those perceived inadequacies. (p. 217)

Further indication that the *Moynihan Report* resulted in a problematic lens can be found in what Kenneth Braswell characterizes as the “oppressive atmosphere of welfare monitoring” (Bates, 2013), prevalent in the 1960s and 1970s. Twenty-two years after the *Moynihan Report*, Bill Moyers’ PBS Special *The Vanishing Family: Crisis in Black America* (1986) not only reinforced Moynihan’s main premises, but also blamed the problem of female-headed households on promiscuity (Crenshaw, 1989). Crenshaw draws attention to Moyers’ emphasis of the Black dysfunctional family, and how the welfare system reinforced it:

The theme of the report was that the welfare state reinforced the deterioration of the black family by rendering the Black male's role obsolete. As the argument goes, because Black men know that someone will take care of their families, they are free to make babies. A corollary to the Moyers view is that welfare is also dysfunctional because it allows poor women to leave men upon whom they would otherwise be dependent. (p. 164)

More recent and perhaps more dramatic influences of the culture of poverty on public policy were implemented by the Clinton Administration in 1996. First, Clinton's "One Strike" rule prohibited anyone with a felony from ever qualifying for public housing. Secondly, he abolished welfare and replaced it with Temporary Assistance for Needy Families (TANF), which requires recipients to have a job or participate in "government imposed 'workfare'" (Ehrenreich, 2012). Such policies are premised on victim blaming, locating poverty within the guise of individual deficits rather than systemic inequities.

Equally as telling as the political application of Lewis' culture of poverty paradigm, was the way in which *The Children of Sanchez* was publicly received. It was not merely an academic text, but a bestselling book. In addition, it was adapted to the big screen (Bartlett, 1979) with a Grammy-award-winning musical score and star-studded Hollywood cast. This 1970s voyeuristic, mainstream fascination with poverty for the purpose of entertainment, not only reflected the cultural ideologies of the time, but perhaps foreshadowed the popularization of Ruby Payne's framework, which would be launched some 20 years later.

It is worth examining not only how Lewis' work, but also how his motivation, have been regarded by academics. Interestingly, even some harsh critics of the culture of poverty concept have a somewhat generous interpretation of Lewis' intentions. In *Miseducating Teachers about the Poor: A Critical Analysis of Ruby Payne's Claims about Poverty* (Bomer, et al., 2008), the authors view Payne as completely co-opting Lewis' work: "In actual fact, much of Oscar Lewis' work was a Marxist analysis of economic power relations and a call for solidarity and collective

action among the poor, but Payne seems unaware of those elements of Lewis' work and only takes up the concept of culture of poverty" (2008, p. 2505). Moreover, Osei-Kofi (2005) suggests that Lewis was only speaking of a "small subgroup of the poor, with the intention of creating a greater understanding" (p. 368). Similarly, in *Deficit Thinking Models Based on Culture: The Anthropological Protest*, Foley (1997) emphasizes that:

...one of the great ironies of Lewis' work is how critics of the poor misread and misused his theory for political ends. Lewis' ethnographic accounts of culture of poverty families are far more nuanced than the secondary accounts of his studies...., the texts contain little moralizing about the poor's immorality and lack of character...Lewis also qualified his theory with the bold assertion that the culture of poverty was found in capitalist countries only. (pp. 115-116)

Other scholars are a bit more skeptical about Lewis' motives:

The culture of poverty began its career as a social science paradigm elaborated by anthropologists, sociologists, and journalists who associated themselves with the Left; yet by the 1980s, it was firmly the property of neoconservatives. Whether it ever really was a progressive concept is not so clear. (A. T. Ortiz & Briggs, 2003, p. 42)

### **General Academic Critiques of the Ruby Payne Model/Framework**

In this section we examine the academic critiques of the Payne model. After an overview of those critiques, we will look at specific critiques, notably: Payne's orientation with the deficit perspective; the negative impact that the Payne model has had on policy; Payne's use of self-publishing and the lack of peer-review; Payne's assertion that she is in the trenches with teachers while academics are threatened by her work; and finally, concerns about how Payne's definition of poverty may be undermining the need to examine the structural inequities that maintain poverty.

### **Overview of Critiques of the Ruby Payne Model/Framework**

Lewis' "culture of poverty" theory was boldly resurrected by Ruby Payne in 1996 with the publication of *A Framework for Understanding Poverty*. The cultural characteristics

attributed to those in poverty, such as dysfunctional matriarchal heads of households, violent behavior, propensity for crime, psychological pathology, alcoholism, and sexual promiscuity; dominate the *Bridges out of Poverty* paradigm.

The scholarly response to the Ruby Payne model has resulted in a wealth of academic peer-reviewed critiques. Most of these articles critique the implementation of Payne's model in the K-12 public education system and are written by education scholars. Gorski (2008b) has synthesized the critiques of Payne in eight essential areas: use of stereotypes, use of the culture of poverty, lack of peer review, deficit theory, paternalistic orientation, politically conservative agenda, and lack of examination of classism. Gorski (2006, 2007, 2008a) offers several other academic articles and edited an anthology (2011) that includes various critiques of Payne, titled *Assault on Kids how Hyper-accountability, Corporatization, Deficit Ideologies, and Ruby Payne are Destroying our Schools*. Gorski (2013) also wrote a book that outlines helpful methods to teach children in poverty while refuting Payne's paradigm, and edited a collaborative anthology which explores the importance of implementing critical social justice concepts in teacher education programs, denouncing the Payne culture of poverty paradigm (Gorski, Osei-Kofi, Zenkov, & Sapp, 2013).

### **Deficit Perspective**

Because it is central to many of the Payne critiques, it is helpful to further conceptualize the notion of "deficit perspective." Valencia (1997) notes that it is difficult to pinpoint exactly who coined the term, but he references a discussion with the educator Arthur Pearl which revealed that the term was first used in the early 1960s in response to a the notion that "the poor and people of color caused their own social, economic and educational problems" (p. x). Deficit thinking is rooted in victim blaming; it is oppressive in nature; and it is not based on sound



science (Valencia, 1997). Moreover, it is characterized by a fluidity that is reflective of the current pseudoscience of the time. For example, heredity and culture of poverty have both been used as explanations for poor school performance (Valencia, 1997).

In an interesting and contradictory chain of events, it is important to recall that one of Payne's (2009) "revised" key points in the *Bridges out of Poverty* framework states that "We cannot blame the victim of poverty for being in poverty" (p. 8). Yet it should be emphasized that Ryan (1976) coined the phrase "blaming the victim" largely in response to Lewis' culture of poverty paradigm, the very paradigm on which Payne's work is based.

Kunjufu (2006) chronicles the way in which Payne's model is particularly harmful to African American children. "Her theory is based on the idea that there is something wrong with African American children. The deficit model is prescribed and based on the idea there is something wrong with our children, and we need a workshop to describe what is wrong with them" (p. xv).

When looking at what makes Payne's paradigm so appealing and why intelligent, well-intentioned people adhere to Payne's methods, Dworin and Bomer (2008) offer an examination, using critical discourse analysis, in which they conclude that:

*A Framework for Understanding Poverty* seems to operate not by informing teacher/readers about actual people's lives, or by weight of evidence about low-income students and their households, but by invoking an existing ideological framework that views students and households through a lens of deficit. (p. 117)

In an additional collaboration, Bomer and Dworin, along with May and Semingson, (2008) conducted a qualitative study of the book *A Framework for Understanding Poverty* in which they coded what they termed Payne's "truth claims," categorized each one, and compared the claims to the existing academic research. They concluded again that deficit thinking permeated the model.

*Getting Ahead* utilizes many of the concepts in the Payne framework, pointing to the same discernible deficit perspective. Along with learning about the “hidden rules” of poverty, middle, class, and wealth, leaders are taught about the transtheoretical stages of change, which, notably were developed by Prochaska and Diclemente (1982) in the context of addictions therapy. This implies that poverty, or at least some components of the lives of people living in poverty, can be treated as an addiction. <sup>4</sup>

### **Payne and Policy**

Because “social belief shapes social policy” (Bohn, 2006), it is worth examining the ways in which Payne’s paradigm has impacted public policy. In “Pathologizing the Poor: A Framework for Understanding Ruby Payne’s Work,” Osei-Kofi (2005) discusses the damage that results when looking at poverty without situating it in the larger context of capitalism, neoliberalism, racism, and classism. In “Pathologizing Poverty: Structural Forces versus Personal Deficit Theories in the Feminization of Poverty” Gunewardena (2009) offers insight into how Payne, in furthering the legacy of Oscar Lewis, has also created the environment for perpetuating the work of Daniel Moynihan and others which led to harmful theories such as trickle-down economics.

### **Payne’s Definition of Poverty and Those Eight (or Maybe 11) Necessary Resources**

As Baptist and Rehmann (2011) articulate, “How we define poverty affects the strategies we choose to pursue in ending poverty” (p. 34). Payne’s (2005) definition of poverty, “the degree to which one does without resources” (p. 7), is problematic because it shifts attention away from issues surrounding the lack of income and wealth as well as corresponding systemic issues. It equalizes the needs of people in poverty with those of middle class or wealth. After all, people

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<sup>4</sup> DeVol inaccurately attributes William Miller for the transtheoretical stages of change. While Miller incorporated the stages of change for later work on Motivational Interviewing (2004), he did not develop them.

in the culture of wealth can theoretically be living in poverty if they are lacking other necessary resources, such as emotional or relational (DeVol, 2005).

Including spiritual factors in this list is particularly troubling, because it assumes a spiritual inadequacy among people in poverty (Gorski, 2006). Further, Payne narrowly defines the spiritual resource as understanding that "...worth and love are gifts from God" (2005, p. 8). This use of the capital "G" in God implies that Christianity is normative, and its unquestioned use reflects what Kivel (2013) describes as the prevalence of Christian hegemony in our society.

### **Payne's Use of Self-Publishing and Lack of Peer Review**

Ruby Payne has her own publishing company, aha! Process, Inc. Because she is self-published, she is not held to the same academic rigor and peer review of academic scholars. A *Framework* was launched in 1996, but it was with the implementation of No Child Left Behind legislation (NCLB) in 2002 that Payne's work started to increase in popularity. NCLB required a separate testing category for economically disadvantaged students, giving rise to new interest by school districts regarding how to best meet the needs of these students (Bomer, et al., 2008). It is important to note that Payne is a significant contributor to the crafters of NCLB, the Bush administration and the Republican Party (Gorski, 2008b).

Another benefit of self-publishing is, of course, the substantial profit margin. With very little overhead, Payne is making millions of dollars every year through her workshops, webinars and book sales (Bohn, 2006; Osei-Kofi, 2005). For nearly 20 years, Payne has used her original book, *A Framework for Understanding Poverty* (1995), changed the content slightly, added co-authors and *voila* remarketed it to new audiences, such as business, churches, married couples, and service providers (Osei-Kofi, 2005). As we've seen, in addition to Payne's own books, *Until It's Gone* and the *Getting Ahead* books are also published through aha! Process, Inc.

A consistent critique of materials produced thorough aha! Process, Inc. is that they are devoid of peer review (Dudley-Marling, 2007; Dworin & Bomer, 2008; Gorski, 2008b; Osei-Kofi, 2005; P. Thomas, 2010). A rebuttal by Payne (2009) published in *Teachers College Record* includes a video where she argues: “The book has sold 1.4 million copies. I would argue that is a form of peer review” (0:56).

The lack of peer review in Payne’s work is worth exploring on several levels. First of all, it indicates that her work does not meet the criteria that the academic community has established for itself as a means of measuring quality (Gorski, 2008b). Further, the two disciplines that are the most zealous about evidence-based practices, perhaps to their detriment: education with the implementation of high-stakes testing (Gorski, 2013; Valencia, 1997); and social work with evidence-based practice modalities (Gray & McDonald, 2006; Otto, Polutta, & Ziegler, 2009; Pease, 2009; Petr & Walter, 2009; Webb, 2001), seem to be embracing the Payne model regardless of its lack of academic evidence.

Probably the most egregious component to Payne’s use of self-publishing is the fact that she makes statements and presents materials that simply are not accurate. There is no indication that her “hidden rules” exist (Gorski, 2008b; Osei-Kofi, 2005), and some scholars have flatly indicated that “she made them up” (Bomer, et al., 2008, p. 2509). This makes the inclusion of “knowledge of the hidden rules” in Payne’s (2005, p. 7) list of necessary resources particularly problematic.

Furthermore, the validity of Payne’s “case studies” are highly suspect (Bohn, 2006), and she has conducted no actual research (Bomer, et al., 2008; Ng & Rury, 2006). She addresses the criticism of not meeting academic standards by dismissing the importance of these standards. On the aha! Process, Inc. website, their “Research Base” is described as follows:

*A Framework for Understanding Poverty* is a cognitive study that looks at the *thinking* or mindsets created by environments. It is a naturalistic inquiry based upon a convenience sample. The inquiry occurred from being involved for 32 years with a neighborhood in generational poverty. This neighborhood comprised 50–70 people (counts changed based upon situation, death, and mobility), mostly white. From that, an in-depth disciplinary analysis of the research was undertaken to explain the behaviors. It does not qualify as “research” against university standards because it does not have a clean [*sic*] methodology. (aha! Process, Inc., 2012a)

The neighborhood Payne describes above is where her ex-husband, Frank Payne grew up. Though he grew up in “situational” poverty, as a result of his father dying when he was six, Frank Payne’s neighborhood consisted of many people in “generational” poverty. During the time when they were married, Ruby Payne (2005) got to know the people in the neighborhood and determined that certain “hidden rules” existed which dictated the behavior of those in generational poverty. In the latest revision, of *A Framework*, Payne (2013) further expands on her credentials by stating that she lived in Haiti for 3½ months while in college, and that she also lived among the wealthy in Chicago for six years when her husband was working for the Board of Trade. It is from those experiences that Payne has qualified herself on the front cover of her book to be “The Leading U. S. Expert on the Mindsets of Poverty, Middle Class and Wealth” (2005).<sup>5</sup>

### **Classist and Racist Stereotypes**

Racist and classist stereotypes pervade the hidden rules. Whereas some of the hidden rules such as knowing how to “use a knife as scissors” and knowing how to “get by without a car” (Payne, 2005, p. 38) seem to teeter on what Ellingson (2001) refers to as the myth of the noble savage; bad parenting, violence, addictions and criminal behavior abound in Payne’s (2005) descriptions of those in poverty. Payne (2005) strongly implies that dysfunctional

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<sup>5</sup> The front cover of the 2013 edition of *A Framework* does not include the “expert” verbiage but instead emphasizes that it is “A Cognitive Approach.”

relationships permeate people in poverty, and as Gorski (2008b) points out, when discussing the culture of middle class or wealth, Payne ignores such concepts as white collar crime and alcoholism, strongly implying that crime and addiction only exist among the poor.

A recent qualitative study focusing on teacher identity development among pre-service teachers examined the stereotypes that future teachers had about the poor prior to and after their exposure to *A Framework*. The study concluded that:

...pre-service teachers made sense of the urban kids they worked with by justifying a separation between them based on the culture of poverty. This separation easily slid into deficit thinking, marking their students not only different but flawed and in need of saving. (Smiley & Helfenbein, 2011, p. 14)

In utilizing critical discourse analysis to deconstruct Payne's construct, Dworin and Bomer (2008) note that although Payne often does not outwardly discuss race concurrently with poverty, she combines prevalent stereotypes about people of color and the people in poverty, tying the two together in readers' minds: "Through Payne's evoking of the dominant discourses about people of color, especially that there is something deficient in their language...the poor are racialized" (p. 116).

Further, as Gorski (2007) states, while Payne claims that she is examining class independently of race, she prominently names the racial identities of all of the individuals in the eight vignettes that appear in *A Framework*, implicitly linking race with class.

Payne (2009) defends her approach—addressing class in the absence of race—in a somewhat confusing video rebuttal, which serves more to underscore the critique than to defend her position:

Race and class cannot be separated is the first criticism, but actually they can be. When I work in Australia it's about Aboriginals. When I work in New Zealand, Maoris. When I'm in Slovakia, it's Gypsies [sic]. When I'm in the United States, it depends on where I am. In the Dakotas, it's Native American Indian; South

Texas, it's Hispanic. It all depends on where you are, with race as equated with poverty. (0:56)

### **Payne in the Trenches**

Payne defends herself from her critics, to a large extent, by painting a picture of academics who, from their ivory towers, luxuriate in the act of critiquing her and benefit from it professionally. In the latest edition of *A Framework*, Payne (2013) retorts:

In the last five years, critics have attacked the work, and almost all are connected with higher education in some manner....Researchers need to publish in order to get tenure and to keep their job. You cannot publish if your methodology is not clean [*sic*], and your details are not perfect, all the qualifiers are not included, and your definitions are not exact. Researchers are trained to critique ideas, details, theory, methodology, and findings but not to assess the practicality of the suggestions or situations. ....If you are a teacher in a classroom with 30 students, then details are not the focus, patterns are; methodology is seldom considered...and the focus is on working with each student for high achievement results (p. 169).

Here, Payne chooses to ignore critiques of her work appearing on social media, such as websites (Ferlazzo, 2012; Heitin, 2012); blogs (Debunking Ruby Payne's Framework of Poverty, 2012); Facebook pages (<https://www.facebook.com/groups/28912878969/>); and YouTube postings (Wittle, 2008), created and utilized by teachers, students, and community members who are questioning and even organizing to resist the Payne model.

The dichotomy presented by Payne, of academics who despise her work and teachers who love her—of a theoretical vs. a practical approach—does not bear scrutiny.

### ***Bridges and Circles***

We now turn our attention to the *Circles Campaign*. Thus far, it has been demonstrated that the Ruby Payne model is problematic on the basis of classist, racist stereotypes, deficit orientation, and victim blaming. We also know that *Circles* is based on that paradigm. As

Lawless (2012) states, *Circles* “has built a relationship with aha! Process that moves beyond supplier/purchaser. In many ways, the two organizations are interconnected” (p. 6).

A 2009 assessment of the *Circles Campaign* in Lane County, Oregon acknowledged that “The scholastic debate about Payne’s work is not really a debate. Scholars overwhelmingly agree that Payne’s work is dangerous” (Lu, Sharp, & Todd, 2009, p. 17). Yet, the report’s authors go on to defend *Circles*’ use of the Payne model stating that in the context of *Circles* the model does not have the same negative ramifications as when used with teachers. They defend this position with three points. First, in *Circles* the hidden rules are offered later in the training, after the participants get to know each other. Secondly, it is made clear that there is a fluidity among classes. Third, because *Circles* does such an excellent job bringing allies and leaders to the table as equals, there does not exist the power disparity that is inherent in the teacher/student relationship (Lu, et al., 2009).

In 2012, a formative evaluation of *Circles* was conducted by researchers at the University of New Mexico. Although only the executive summary is publicly available, it reaffirms the Payne critiques and confirms *Circles*’ ability to overcome them:

Similar to the 2009 study of Circles® by the United Way of Lane County, Oregon, we note the critiques, as well as agree that Circles® moves beyond the critiques by genuinely attempting to equalize people from different class backgrounds. The move to make people in poverty Circle Leaders, for example, exemplifies this claim. (Collier & Lawless, 2012, p. 7)

However, Lawless (2012) is more critical about *Circles* use of aha! Process, Inc. materials in her doctoral dissertation, *Ending Poverty?*:

The value of social hierarchies, reinforcement of dominant ideologies, colorblind portrayals, and a monolithic understanding of class, reproduce the status quo and ultimately offer little in the way of suggesting changes to institutional policies and broader systems that produce and reinforce poverty in the U.S. The discourses present individual agency as dramatically increased due to the aha! materials and



pays [*sic*] limited attention to larger systems of oppression. Rather than creating a climate of critical consciousness in which class positioning is understood as multicultural, complex, dynamic, and intersectional, and offering relevant, contextually informed options for individual conduct as well as collaborative options for change, *GA* and *BOP* construct class subjectivities in a way that does not move beyond status quo conceptions. (p. 118)

Despite those criticisms, Lawless (2012) remained optimistic about *Circles* throughout her dissertation. She maintained that Scott Miller was receptive to her many critiques, and that she would be involved in creating new training materials for *Circles* as well as writing articles for the academic and social service community addressing *Circles*' intention of moving past the aha! Process, Inc. model.

### **Research Question**

Thus far, we have explored Ruby Payne's aha! Process, Inc. model, including the academic critiques. We have also examined the *Circles Campaign* structure and the reliance of *Circles* on aha! Process, Inc. for its training materials and many of its core constructs. We have suggested that *Circles* is changing as a response to criticisms. Based on this background, I have developed the following research question:

Given the sound academic critiques of the *Bridges out of Poverty* construct, and the lack of evidence that *Bridges* or *Circles* works, why has our community embraced them as methods of poverty alleviation?

## CHAPTER THREE: METHODOLOGY

This chapter begins with a broad overview of my chosen research paradigm and continues with a refined description and explanation of the methodology which I have designed. I then explicate my data collection methods; illustrate the processes that will shape this thesis; and finally address ethical concerns.

### **Qualitative Research Paradigm**

My interest in studying *Bridges* and *Circles* is to deeply understand not only *what* the initiatives are and *how* they interact and impact communities, but *why* they operate as they do. I am not concerned with a positivist, quantitative approach which would serve to merely describe the issue. Rather, I seek to explain, to expose, and to interpret the many elements involved in the relationships between these anti-poverty initiatives and people they affect. Whereas quantitative research is rooted in determinism, claims objectivity, and is based on cause and effect relationships (Bloomberg & Volpe, 2012), “qualitative research is suited to promoting a deep understanding of a social setting or activity” (p. 27). Thus, this study fits within the broad paradigm of qualitative analysis. With that understanding, we can move into the methodology of the study, beginning with grounded theory.

### **Grounded Theory**

This study utilizes grounded theory as an overarching methodology. Doing so allows for flexibility in data collection methods, while ensuring a rigorous approach to data analysis. It provides an outcome that has the potential to explain, rather than merely describe the results (Birks & Mills, 2011).

Grounded theory is an inductive method of study wherein the researcher creates conceptual frameworks or theories from data (Charmaz, 2006). The original formation of

grounded theory is attributed to the collaboration of Strauss and Glaser in the 1967 publication of *The Discovery of Grounded Theory* (Babbie, 2007). Positivist in scope, Strauss and Glaser had a theoretical parting of ways when Strauss began to embrace a post-positivist approach. By 1990 when Strauss co-authored *Basics of Qualitative Research: Grounded Theory Procedures and Techniques* with Corbin, it was clear that there were two distinguishable types of grounded theory: Glaser's positivist version and Strauss and Corbin's post-positivist variety (Charmaz, 2011). In 2002, the emergence of constructivist grounded theory began to appear, embracing the original Glaser and Strauss classic grounded theory methodology, but employing a relativist epistemology (Charmaz, 2011). Charmaz (2006), a constructivist, recognizes the practicality of the integration of objectivist and constructionist frameworks into grounded theory, emphasizing the objectivist analytic modality as a counterpart to the constructivist critical examination of the process.

In *Grounded Theory: A Practical Guide*, Birks and Mills (2011) guide the novice researcher through the various iterations and theoretical variations of grounded theory, providing a clear outline for conducting research using grounded theory as methodology, and offering reassurance that the process will become clearer once it has begun. They outline ten components to the grounded theory process (pp. 11-12):

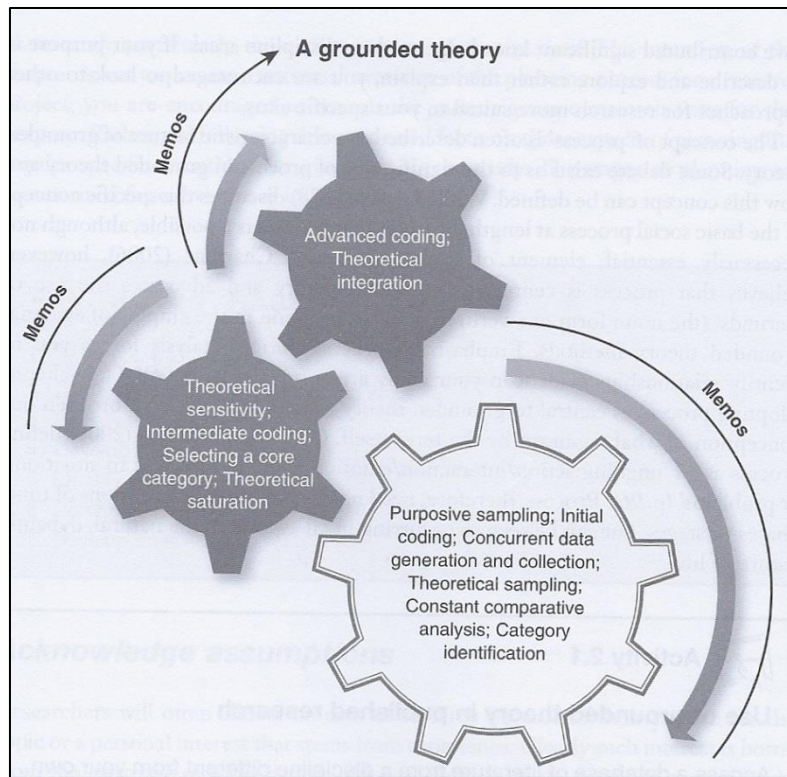
- 1) Initial coding and categorization of data.
- 2) Concurrent data generation or collection and analysis
- 3) Writing memos
- 4) Theoretical sampling
- 5) Constant comparative analysis
- 6) Theoretical sensitivity
- 7) Intermediate coding
- 8) Identifying a core category
- 9) Advanced coding and theoretical integration
- 10) Generation of theory

The initial coding step is the first opportunity for the researcher to interact with the data. The second step is what most clearly distinguishes grounded theory from other theories: The researcher does not use data to test a hypothesis, but rather uses the initial data to decide what further data should be collected. Writing memos is an essential component to the process, as memos capture the thoughts of the researcher throughout the work. In the fifth component, the researcher must always be comparing “incident to incident, incident to codes, codes to codes, codes to categories, and categories to categories.... a process that continues until the grounded theory is fully integrated” (Birks & Mills, 2011, p. 11). Charmaz (2006) stresses that memo-writing is a creative process and suggests the researcher use it as a path to analyze data and codes, engage in categories, find patterns, and advance meaning.

Theoretical sensitivity is “the ability to recognize and extract from the data elements that have relevance for your emerging theory” (Birks & Mills, 2011, p. 59). It is a process that is continuously unfolding and includes both attributes of the researchers and their ability to offer a unique perspective to their research; this insight is lost at the point at which the researcher focuses prematurely on only one theory (Glaser & Strauss, 1967). Intermediate coding is the process of creating categories and linking them to other categories. A core category may emerge which, “...encapsulates and explains the grounded theory as a whole. Further theoretical sampling and selective coding focus on actualizing the core category in a highly abstract conceptual manner” (Birks & Mills, 2011, p. 12). In advanced coding and theoretical integration, it is sometimes appropriate to invoke existing theories in order to more fully explain the emergent grounded theory. Finally, a theory is generated that explains the concepts being studied rather than merely describing or exploring them (Birks & Mills, 2011). Grounded theories are “systematic statements of plausible relationships” (Strauss & Corbin, 1994, p. 279).

Charmaz, from her constructivist stance suggests that attending to the “what and how questions builds the foundation for moving into the why questions” (2008, p. 408). She emphasizes: “In actuality, few grounded theory studies build theory, but many provide an analytic handle on a specific experience” (2008, p. 401).

The following is a visual representation of the method of grounded theory, offered by Birks & Mills (2011, p. 17):



**Figure 5: Grounded Theory Process**

Pure grounded theory insists that the researcher begin with as little prior knowledge as possible about the area of study. Glaser and Strauss (1967) refer to existing literature as “received theory” and suggest postponing this step until after the analysis so that it does not influence the researcher’s outcome. Birks and Mills (2011) suggest that scholarly literature be

utilized only to process data that is gathered, and even then, it is weighted only as the equivalent of the data.

Because of my prior research concerning this area of study, my use of grounded theory could probably be considered a hybrid (Birks & Mills, 2011). I've been studying, writing, and even presenting about the *Bridges out of Poverty* and *Circles* models over the past two years; my insights inform this thesis from the beginning. As is evident in the last chapter, I have conducted an extensive review of the academic literature in the content area. I make no claims to begin this study free of either an understanding of the academic treatment of it or of my own critique. In fact, as an activist working with people in poverty for over ten years, my positionality has led to a unique and potentially valuable understanding of *Bridges* and *Circles*; I entered into this study embracing that perspective. In *Feminist Social Work, Theory and Practice*, Dominelli (2002), supports this variation of grounded theory and expands upon it, stating that she has "misgivings about grounded theory's capacity to decontextualize and depoliticize people's stories because it requires a negation of the values of the researcher, something which is methodologically impossible for feminist researchers to achieve" (p. 14). Charmaz (2006) encourages the researcher to weave the literature throughout the writing, rather than confine it to only one chapter. Yet, in terms of the researcher's positionality, she reminds us that "rather than being a *tabula rasa*, constructionists advocate recognizing prior knowledge and theoretical preconceptions and subjecting them to rigorous scrutiny" (Charmaz, 2008, p. 402).

True to the grounded theory method, my research question is broadly stated. Rather than testing a hypothesis, I am seeking to explain concepts which emerge during the process of engaging with my data and which fall within the umbrella of my research question. Further, I will not begin my data collection and analysis with a specific, refined theoretical lens. Instead,

as I interact with the initial autoethnographic data I have collected and begin the coding process, I will choose a theoretical lens that is the most appropriate for each emerging theme. This lens will inform the way in which I will work with my data: coding it, writing memos, and conducting constant comparative analysis. I will determine what new data I need to further refine each topic. The additional data will be gathered one of three ways: through *Circles*' and *Bridges*' promotional materials and website information; through reengagement with academic literature; and through interviews. I will thus proceed with my data until three to five such themes fully emerge. Finally, I will examine the ways in which the themes are related to each other. These steps will not necessarily take place in a linear fashion, as I take to heart Charmaz's (2006) insistence that "the strength of grounded theory methods lies in their flexibility...one must engage in the method to make the flexibility real" (p. 178).

### **Autoethnography**

Consistent with and complementary to grounded theory is the method of autoethnography, which I will be utilizing as the initial method of my data collection to begin coding. Chang (2008) describes autoethnography as similar to standard ethnographies in that it utilizes a systematic way of collecting data, strives to gain a cultural understanding through analysis and interpretation, and seeks to understand others through self. Yet, it differs from standard ethnographic approaches, in that the experiences of the researcher become primary data. Muncey (2010) describes the autoethnographer as "a participant in the social context in which their experience takes place...an observer of their own story and its social location" (p. 2).

Autoethnography as a research method is not without its critics. While recognizing the value of autoethnography in linking the personal to the cultural experience, Holt (2003) cautions that "those who produce autoethnography are at risk of being overly narcissistic and self-

indulgent” (p. 19). I heed those warnings, but proceed with the method in conjunction with grounded theory and tempered with an analytic (Anderson, 2006), rather than an evocative (Ellis, 1997) approach, a distinction that is clarified in the following section.

Autoethnography will allow me to freely discuss my unique perspective and history as an activist, community organizer, and student, which will allow for greater transparency as this thesis unfolds. The reader will not be distracted by attempting to discern my perspective or approach. I will freely offer my worldview as I know it; I will openly share my theoretical framework as I develop it.

### **Analytic Autoethnography**

Just as lively scholarly debates surround two distinct versions of grounded theory, objectivist and constructionist; so too does contention exist around two distinct variations of autoethnography, evocative (Ellis, 1997, 2002; Ellis, Adams, & Bochner, 2011) and analytic (Anderson, 2006). Ellis and Bochner (2000) insist that academic writing infused with emotion merges social science with literature and that analytic autoethnography “runs the risk of co-opting a radical alternative—autoethnography—and using it against itself to reproduce the modernist project of realist ethnography” (2006, p. 434). Anderson (2006) asserts that by allowing the researcher a perspective that is more theoretically grounded and critical in tone, a richer understanding of that being researched can result, and connections to broader social science theory can be developed. It is Anderson’s perspective of autoethnography that I will use as a foundation for my research.

Anderson (2006) proposes five elements to analytic autoethnography: “1) Complete member researcher (CMR) status; 2) analytic reflexivity; 3) narrative visibility of the researcher’s self; 4) dialogue with informants beyond the self; and 5) commitment to theoretical



analysis” (p. 278). The work that I am about to embark upon reflects Anderson’s five steps. Complete member researcher status has been obtained through my 19 months of volunteer work with *Circles Larimer County*. I will be engaging in analytic reflexivity as I interact with my data through the grounded theory process. I will be writing the study in the first person, with a positionality that will promote visibility.

As Charmaz and Mitchell (1996) contend in *The Myth of the Silent Authorship*, academics are often encouraged to silence our own voices in our work, but a great deal is to be gained from the thoughtfully articulated voice of the researcher. By remaining visible throughout my work, I will be transparent in my stance, descriptive in my processes, and thoughtful in my analysis, striving to create an interactive experience for the reader as I work through the research. By conducting interviews, I will dialogue with informants beyond myself. My commitment to theoretical analysis will be guarded throughout the grounded theory process.

Engagement with my initial data—my autoethnographic notes and reflections as an ally volunteer with *Circles*—will serve exclusively as a primary means of informing decisions regarding what data to gather next. The stories of the participants at the Educational and Life Training Center (ELTC) in Fort Collins will never be visible throughout this work. This study is neither an examination of ELTC nor of its specific utilization of *Circles*. My experience there was solely that of an ally volunteer. Indeed, during the 19 months in which I was volunteering at ELTC, I did not have an established research methodology, only a rich desire to understand how *Circles* and *Bridges* contribute to poverty alleviation and why communities engage with the work. That I carry with me the perspective of an activist and a scholar—identities that can never be separated from the way in which I carry myself through the world—will provide a unique examination of *Bridges* and *Circles*, one which I feel obligated to pursue.

## **Integration of Grounded Theory and Autoethnography**

As stated earlier, grounded theory was developed by Glasser and Strauss (1965), who utilized interviews and supplementary data, primarily from an ethnographic paradigm. Their first grounded theory study examined dying patients and the awareness of their own pending death. Throughout grounded theory's various twists and turns (delineated earlier in this chapter), a merging with autoethnography was one outcome. In *Speaking of Sadness: Depression, Disconnection, and the Meanings of Illness*, Karp (1996) takes an autoethnographic approach to a grounded theory exploration of depression. In *Collaborative Autoethnography*, the authors discuss a variety of methods to deal with autoethnographic data, one being grounded theory (2013). Additionally, Ellis (2004) describes autoethnography and grounded theory used together as "different ways of making sense" (p. 312). More specifically, Ellis and Bochner (2000) suggest using a "straight grounded theory analysis" (p. 757) for autoethnographic work. In *Writing the Self into Research*, Pace (2012) explores with practicality the interaction between autoethnography and grounded theory.

Autoethnographic works frequently do not contain a separate methods section, freeing the authors to embrace unforeseen methods throughout the work and to center themselves as a primary source through which the story is told (Anderson & Glass-Coffin, 2013). Yet, I chose to write this section as a way to formulate my own understanding of the process. Doing so has not only given me appreciation of those who have refined the method before me, but also has created clarity regarding how I move forward. As a researcher, my autoethnographic voice is as present in this section as it will remain throughout the work; it is not merely data integration that I pursue autoethnographically, but the entire research process. While furthering an understanding of the

concepts I am studying, this type of self-clarification has been documented as an outcome of autoethnographic research (Anderson, 2011).

Although this chapter might resemble a traditional methodology section, I purposefully did not include a section defining a theoretical lens thus far, but instead I will allow it to emerge as I interact with my data, a strategy promoted by grounded theorists (Birks & Mills, 2011; Charmaz, 2006; Glaser & Strauss, 1967; Strauss & Corbin, 1994).

Approaching this study from an autoethnographic stance that utilizes grounded theory gives me the context, as a researcher, to explore issues from multiple angles. Rather than delineating a starting point that encompasses a specific theoretical approach, such as conflict theory, and answering a narrow research question through that context, I am challenging myself to explore this study from multiple perspectives, a process which will not only provide personal growth as a scholar, but will also produce a deeper, more thoughtful result.

Chang (2008) suggests that autoethnographic work benefits from a triangulation with multiple sources, such as data, interviews and artifacts to provide accuracy and validity; I agree, and I am taking this further. Autoethnography and grounded theory woven together represent a mixed-genre text, providing the promise of integrity and creativity. As Richardson (2000) stresses, triangulation has long been a point of validation, incorporating several methods of data collection (such as interviews, documents and other data) into a single study, but “in post-modern, mixed genre texts we do not triangulate; we *crystalize*. We recognize that there are far more than ‘three sides’ from which to approach the world” (p. 934).

Perhaps I am leaving the comfort of a rigid container to guide my project; but what I gain is the possibility of a learning far richer, opening avenues which I have not yet considered and a path to share these insights with my community.

## Data Collection Methods

I have collected over 50 pages of autoethnographic notes and reflections that were compiled during ally trainings and volunteer time with *Circles*, between January, 2012 and October, 2013. This represents over 90 hours of contact time. As mentioned earlier in this chapter, these notes will be used only as background and to begin my coding process.

Additionally, I have collected artifacts such as training materials and notes from over 25 hours of community trainings in the *Bridges* model. I have also obtained over 40 pages of blogs and other information from Scott Miller's *Move the Mountain* website.

As I begin to interact with my data and begin the coding process, I will explore other sources including: podcasts; *Circles* and *Bridges* promotional materials; newspaper articles and opinion pieces; more internet based materials and further academic literature. I have obtained institutional review board (IRB) approval at Colorado State University to conduct as many as 16 interviews.

Here I will note that I have chosen not to interview individuals associated with *Circles USA*. According to Mary Jane Collier, Director of Evaluation for *Circles USA* (personal communication, March 9, 2014):

*Circles USA* is refining a protocol for outside researchers. This protocol includes submission of a proposal for the research that includes a description of how Institutional Review Board procedures are being followed such as: use of informed consent procedures, design and methods that follow ethical standards, steps being taken to protecting [*sic*] privacy of respondents, and quoting from interviews only when data is de-identified and pseudonyms are used.

Because I believe this thesis will be more useful if I include *Circles USA*'s name as well as individuals associated with it at the national level, and because there is a wealth of information about the organization available to me both on the internet and through my research

notes taken at public meetings, I chose to use their name. The limitations created by my decision to forego interviewing those involved with *Circles* are addressed in chapter five.

The potential data points available to me as I proceed are significant. Having them at my disposal frees me to begin the grounded theory process unimpeded by obstacles. Once data coding begins and the need for new data emerges, I will be able to draw from a broad tool chest. The information that I have gathered far surpasses what I will use as I write the pages that follow, but the sheer abundance will allow me to thoroughly and creatively engage in the topic.

### **Ethical Concerns**

I was uniquely positioned as an activist, a researcher, and as one who participated as an ally in the *Circles Campaign* from January 2012 through October 2013. As such, during my time as an ally, my commitment to the *Circle* leader took priority over my research, as I realized that a conflict of interest could occur. My volunteer work served only as background for my research; I was as invested in gaining an understanding of the *Circles Campaign* as I was in the possibility of working to alleviate poverty in my community. Because I had worked as an ally with marginalized populations frequently in the past, I began this research with a firm understanding that it often matters more to be supportive in someone's process than to be "right" about what that process should be. I was confident that working with my leader in the *Circles Campaign* was a commitment that I could genuinely fulfill.

### **Conclusion**

This will be the first academic study to explain the *Circles Campaign*, its integration of the *Bridges out of Poverty* model, and its claim to "end poverty in our lifetime." Grounded theory, woven together with autoethnography, will allow me fully utilize my unique positionality

as an activist, student, community member, volunteer, and participant-researcher, unearthing a deep understanding.

Academic peer-reviewed critiques of the Ruby Payne model offer a solid starting point for the study, and for that I am grateful. My own community is hungry for this analysis, and the rigor of grounded theory will allow me to make that contribution

## CHAPTER FOUR: RESULTS

### **Introduction**

I began to interact with my autoethnographic data by coding my initial field notes and reflections. As themes emerged, I wrote short thematic notes, known as memos (Birks & Mills, 2011; Charmaz, 2008), and sorted them into codes. Once the categories began to take shape, I named them, a process that seemed to give them meaning. As it became apparent that I needed more data with which to compare to the existing data, I would do one of several things: screen a YouTube video, schedule an interview, or even consult Google Scholar for more academic material. I would then compare the new data with the categorized data until a theme would emerge. The experience, though horribly tedious at times, reminded me of a “participatory practice” strategy that I learned from a workshop I attended in 2007 at Village Earth, a non-governmental organization based in Fort Collins. Working with communities in Peru, Guatemala, India, and Pine Ridge Indian Reservation, the organizers at Village Earth facilitate a process whereby community members identify their goals, categorize them, and name them. I have used similar strategies with local community organizing work. Although this current project landed me alone with my data, sometimes feeling pitted against it, I was grateful for my prior experience of using a similar strategy for community organizing, as it gave the process a sense of familiarity and context.

I embraced both Birks and Mills’ (2011) suggestion of keeping liberal amounts of chocolate on hand and Charmaz’s (2006) invitation to freely talk to myself while sorting through memos (2006). I somehow pictured the most significant writing project of my life playing out in front of a crackling fireplace, while sipping on bourbon and pondering the various angles at which to approach my next sentence. Instead, I no doubt resembled someone who was losing

touch with reality and who badly needed exercise and vegetables. With this as a backdrop, I found myself at the same time apprehensive and intrigued about what might emerge from my data analysis.

Three significant thematic concepts surfaced throughout the data analysis process as I examined *Bridges* and *Circles*, namely: *Bridges* and *Circles*' Approach to Intersectionality; Efficacy of the Payne Model (*Bridges*) and *Circles; and Circles* for a New Age.

This chapter examines each of these three concepts in turn. Each section unfolds in a narrative, holding true to my commitment to autoethnography. Additionally, in an attempt to create an interactive process, I conclude each section with the major themes which emerged through the utilization of grounded theory, as well as the data that was utilized.

This chapter concludes with a theoretical explanation of the issues being addressed, in which I return to my initial research question.

### **Thematic Concept One: *Bridges* and *Circles*' Approaches to Intersectionality**

#### **Introduction**

“My experience is not better and is not worse than yours, but it’s probably different and that’s okay.” This was the phrase that the room full of over 100 community members, city employees, agency directors, and service providers dutifully repeated to a partner at their table. I looked around, without success, trying to find someone who might appear to be as concerned as I was. The occasion was an advanced *Bridges out of Poverty* training in September, 2013, and the focus was on “intersections of poverty and the ‘isms.’” In chapter two we explored Payne’s steadfast position that it was appropriate to explore poverty in the absence of discussions regarding race. I found it interesting that aha! Process, Inc. was now actually exploring the issue of poverty from what they represented as an intersectional perspective, and I was curious to see



how the training would be conducted. The training's facilitator was Jodi Pfarr, an aha! Process, Inc. consultant. After reviewing my autoethnographic reflections following the event, I began to write memos and chose to investigate academic material authored by women of color feminists regarding intersectionality. The following section begins by discussing the theory of intersectionality. I then return to my reflections on the *Bridges* training, and I also explore ways in which *Circles* handles issues regarding poverty and intersectionality. Finally, I examine *Bridges* and *Circles* use of social capital through the lens of critical race theory (CRT).

### **The Theory of Intersectionality**

Because intersectionality of race, gender, sexuality, and ability, are inextricably connected to issues of poverty, wealth, and social and economic class (Mehrotra, 2010), and because the *Bridges* training was examining the intersection of poverty with race and other marginalized identities, the theory of intersectionality provides an appropriate lens through which to examine this data.

The theory of intersectionality began by “critiques by feminists of color of white feminists’ use of *women* and *gender* as unitary and homogeneous categories reflecting the common essence of all women” (McCall, 2005, p. 1776). Feminist of color began to assert that gender not be the sole criteria upon which oppression is measured and that multiple oppressions result in “dynamic, shifting and multiplex constructions of intersectionality” (Yuvel-Davis, 2006). Kimberlé Crenshaw (1989) coined the term *intersectionality* in the context of case law, specifically in workplace discrimination cases involving Black women. The defendants argued that since they had evidence that they did not discriminate against women or Black men, they could not be found guilty in discriminating against Black women. In speaking about the experience of Black women, Crenshaw (1989) suggests:

Because the intersectional experience is greater than the sum of racism and sexism, any analysis that does not take intersectionality into account cannot sufficiently address the particular manner in which Black women are subordinated. (p. 140)

Crenshaw (1991) later explicated intersectionality as a way to “account for multiple grounds of identity when considering how the social world is constructed” (p. 160). Collins (1990) discusses the necessity of examining oppressions from an intersectional approach in order to adequately address complexities: “Intersectional paradigms remind us that oppression cannot be reduced to one fundamental type, and that oppressions work together in producing injustice” (p. 18).

Mehrotra (2010) suggests that an intersectional lens allows us to broaden our perspectives and examine the multifaceted impacts of interlocking oppressions. Crenshaw (1991) first elucidated the concept of interlocking oppressions when she discussed the marginalization experienced by women of color in the context of domestic violence. Examining both structural and political intersectionality, Crenshaw illustrated how women of color were tokenized or excluded from domestic violence support services when White women neglected to recognize significant differences, essential to providing appropriate services for women of color. Collins (1990) refers to these interlocking oppressions as the “matrix of domination” (p. 18).

The tendency to oversimplify a person’s experience can be combated by employing the lens of intersectionality and is essential in social service arenas: “The avoidance of homogenization is particularly essential in disciplines, such as social work, that have an interest and level of sensitivity in working with and advocating on behalf of diverse and marginalized populations” (Murphy, Hunt, Zajicek, Norris, Hamilton, p. 8).

Hegemony, a concept central to intersectionality, describes social domination by the ruling class, not only through means of coercion but also by consent of the masses (Gramsci, 1971). Crenshaw (1988) speaks of hegemony as “the means by which a system of attitudes and beliefs, permeating both popular consciousness and the ideology of elites, reinforces existing social arrangements and convinces the dominated classes that the existing order is inevitable” (p. 1351). I find that hegemony evokes a social, political, and economic counterpart to the experience of gravity, an invisible force that keeps everything and all of us in place with unquestioned certitude.

Gramsci developed the concept of hegemony while imprisoned by Benito Mussolini's Fascist regime from 1926-1935 (Hoare & Smith, 1971). He offers another important contribution to critical thought in his treatment of the concept of the intellectual. Believing that “non-intellectuals do not exist,” Gramsci (1971, p. 9) suggests that there are of two types of intellectuals. “Organic intellectuals” are those who come through the ranks and file of the working class, can articulate their analysis, and are respected as leaders who can bridge theory and practice. “Traditional intellectuals” on the other hand, are those who possess less grassroots experience and more formal education. Critical thought or “the critical elaboration of the intellectual activity that exists in everyone” (p. 9) is essential in the effort to overcome hegemonic structures.

### ***Bridges and the “Isms”***

We will return now to the advanced *Bridges* training of September, 2013. The afternoon began with Valarie Wendell, the Project Manager for Special Initiatives at Bohemian Foundation welcoming us. She pointed us to strips of cardstock on our tables and invited us to write down one thing that had inspired or moved us to action with *Bridges* since the pilot began 18 months

prior. Bohemian Foundation would include those thoughts in their two-year community report. Uncomfortable with that method of gathering data, I was curious about how it would be incorporated in the community report.

As I moved through the Pfarr training, and as I reviewed my autoethnographic reflection of the experience, I did so as a community organizer who has attended as well as facilitated many anti-oppression trainings. I realized that the *Bridges* training would be significantly different from those I generally participate in, but I withheld judgment, because I was aware of the difficulty inherent in effectively impacting the population that was represented in that room. The attendees, by and large, consisted of well-intended, hard-working service sector people—city employees and agency staff—many of whom I'd worked with positively in the past. This was an introductory training for people who generally had little experience with anti-oppression work. I would not suggest pushing people too hard or too fast on this issue, as I know it can be counterproductive to do so. Because of this, the memos that I wrote focused on whether or not I thought the training was on the right trajectory, not whether or not it was “radical” enough.

One of the things I noticed in my memos was that I expected the aha! Process, Inc. training on the “intersections of poverty and the ‘isms’” to be much easier to deconstruct from the lens of intersectionality theory. In actuality, there were many concepts taught with which I could agree. Pfarr talked about how the system normalizes and privileges one group over another. She talked about the concept of colluding (in Pfarr's words “co-signing”) with those who hold power in a dysfunctional system, giving us an example of women colluding with men in order to gain respect in a corporate setting. This analysis is consistent with Gramsci's hegemony. Pfarr talked about issues around tokenizing marginalized populations when you

ineffectively try to diversify a group or organization. There was discussion about how societal systems of oppression are very often set up intentionally.

When I examined what Pfarr didn't bring into the room, I found there was more rich information in my memos. Pfarr spent quite a bit of time focusing on the existence of multiple intersecting identities, but the context in which she described the "intersections of poverty and the 'isms;" was ahistorical, denying the long history of white supremacy and intentional oppression (Collins, 2000). She didn't include any sort of a context regarding how the current systems of oppression in our culture came to be. She didn't talk about capitalism as a significant factor influencing white privilege (Collins, 200; Johnson, 2006), and she never mentioned the social construction of race (Brewer, Conrad, & King, 2002; Collins, 2000; Jacobson, 1998; Lipsitz, 2013). There was a peculiarity to her use of language in that she often omitted nouns when she used identity descriptors. For example, she would say "of color" rather than "people of color," which had an effect of dehumanizing and decontextualizing the concepts.

Pfarr used the example of left-handed and right-handedness to look at what is normalized and not normalized in our society, and participants brainstormed ways in which people who are left handed are marginalized. While at first this seemed to be an easy to grasp and perhaps relevant example, she referred to it repeatedly throughout the workshop, with the effect of trivializing larger, more oppressive systems, such as race, class, gender, sexuality, and ability. She acknowledged this tendency, by sharing with us a concern of a woman in a recent workshop that "left handed" and "right handed" should not be placed on the same flip chart page as "white" and "of color," but she explained that because the activity is about normalization and not necessarily the degree of oppression, those things should, in fact, be placed on the same page.

Pfarr showed us a film called *People Like Us: Social Class in America* (2001), but showed a segment that only addressed upwardly-mobile African Americans, emphasizing that 50% of African Americans are now middle class. She recommended two authors: Kirby Moss and William Julius Wilson. Moss is an African American scholar and journalist, the author of *The Color of Class* (2003), an ethnographic work that focuses on poor Whites in a Midwest city. Wilson, in his earlier work, such as *The Black Underclass* (1986) contended that modern racism was no longer a significant issue in terms of the oppression of Blacks, and that “inner-city blacks...will be helped not by policies addressed primarily to inner-city minorities, but by policies designed to benefit all of the nation’s poor” (p. 129). In his latest book, *More than Just Race: Being Black and Poor in the Inner City*, Wilson (2009) retracted much of that:

In my previous writings I call for the framing of issues designed to appeal to broad segments of the population. Key to this framing, I argued, would be an emphasis on politics that would directly benefit all groups, not just people of color. My thinking was that, given American views about poverty and race, a color blind agenda would be the most realistic way to generate the broad political support necessary to enact the required legislation. I no longer hold to this view. (p. 141)

Yet, he is persistent in defending the *Moynihan Report*, claiming that it had fallen victim to a hostile media (Wilson, 2009).

I reviewed my memos regarding the materials that were used and/or recommended at the Pfarr training. First, there was a film segment dealing with African American upward social mobility; secondly, there was a book written by an African American scholar, with a focus on poor Whites (Moss, 2003); and third, there was Wilson, an African American author and sociologist who, until recently, maintained that ghetto culture was a more significant factor than racism in the oppression and poverty of African Americans (Robinson III, 2009).

While Payne (2009) had vehemently defended her position of separating class from race, in this context, aha! Process, Inc. was focusing on African Americans. As stated earlier, Pfarr did address multiple identities, but the discernable focus on African Americans as the “minority,” reduced the complexity of the issue to a Black and White racial concern, rendering invisible the multitude of other racial and ethnic identities.

The oversimplification inherent in the phrase Pfarr asked attendees to repeat, “My experience is not better and is not worse than yours, but it’s probably different and that’s okay,” was symptomatic of a training that avoided significant issues, systemic causes, and deep-rooted oppression. Pfarr was using the terms “better” and “worse” as a means of cautioning us not to use value judgments, but in doing so, she erased historical, intentional, and systematic oppression bestowed upon oppressed groups within our society in order to further benefit those with privilege. Situated at the table of eight others during the training, my experience could be infinitely worse than those next to me, or it could be infinitely better.

### ***Circles’ use of Faux Intersectionality***

In terms of Miller’s analysis of race and poverty, he mentions race in *Until It’s Gone* only to gloss over it, demonstrating his lack of understanding of the complexities of racism in the context of intersectionality, and implying that people of color should be his teachers: “I can best learn by listening closely to those who experience racism, allowing them to guide me in ways that will ultimately move all of us beyond these destructive social constructs” (2008, p. 28).

Miller’s (2011e) Move the Mountain blog indicated a similar lack of understanding about issues surrounding race. As is the case with *Bridges*, Miller frequently speaks of race in terms of Black and White, overlooking a multitude of racial identities. He credentials himself as having “hundreds of hours of diversity training, intense work around racism and privilege, personal

reflection and even confrontation from others about how I have used my white privilege” (para. 10). Yet, again, he still seems to be looking to those who are marginalized to teach him, “...I should always be open to and seek out communication from others about how my privilege is playing out and what I can do so that others feel empowered around me” (para.11).

Miller’s (2013a) new training material overview posted on YouTube seems to reinforce this concept: “One of the things I love about *Circles* is our ‘oops and ouch’ rule. When someone crosses a hidden rule we say ‘ouch’ and the person who broke the rule can say ‘oops’ and explain what hidden rule I broke” (0:47). Miller (2008) emphasizes this notion in *Until It’s Gone* when he discusses the application of Payne’s model to *Circles* “...as in any relationship involving different cultures, hidden rules are often unknowingly broken. Once such hidden rules—assumptions and attitudes—are acknowledged and discussed, people can learn, forgive, teach, heal and move on” (p. 7). This puts the onus on marginalized people to teach those with more privilege what they need to know, further privileging them. Additionally, it greatly minimizes harm that is done by those with privilege when they insult people by acting in a racist, classist, or other offensive way. Miller does not demonstrate an understanding that, regardless of our intentions, it is our impact that we must be responsible for (Hand & Goffney, 2013; Harris & Moritz, 2007), and that in order to be productive, apologizing requires de-centering those with privilege, acknowledging the experience of those who were harmed, and committing to change one’s behavior (Johnson, 2006).

On the *National Circles Campaign* Linked-In page, race takes a more prominent role in the overall goals: “Rather than targeting a surface need of at-risk communities such as housing or food provision, Circles® seeks to expand social capital by fostering relationships across racial



and economic lines” (Circles USA, n.d.-e), but there is little information publicly available about how this will be accomplished.

Miller (2008) further reveals his lack of understanding about privilege, by asserting that a career in non-profit work is tantamount to a marginalized identity:

As a “white” male from a middle-income family who did well in school and had his college expenses paid by others, I know about privilege. As someone whose early life experiences and choices led to a non-traditional career path, I also know what it is to feel marginalized by others—to feel as if you are less than others. (p. 80)

In his discussion of domestic violence, Miller (2008) demonstrates a further lack of understanding of intersectionality while at the same time, adhering to a deficit perspective:

...women must share responsibility for families falling apart. Women who continually enter into relationships with irresponsible men and bear their children also need the gift of honest conversation from those close to them. (p.42)

Although most leaders in the *Circles* program are women (Lawless, 2012), there is no mention of root causes such as the “feminization of poverty,” a term coined by Moghadam (2005), in which she stressed the disproportionate negative impact that neoliberalism has on female-headed households. By contrast, Miller’s (2008) vision for a future that is rid of poverty is reminiscent of a 1950’s nuclear family in which enough people had “figured out how to have enough money, enough friendship, and enough meaning in their lives to be truly happy” (p.124).

Miller’s dismissive approach to the complex issues surrounding poverty was exposed during a TEDx talk in Albuquerque in October of 2011. In it, Miller shares his dismay at our country’s inability to get people all the way out of poverty. He mentions a group in Iowa that tracked 5000 people in poverty through 115 agencies, and found that a few did get out of poverty, and they did so because: “...people married somebody with a job. It turns out that two jobs are better than one. One is better than none...should we create a dating service?” (Miller,

2011,2:22). This inappropriate and offensive use of humor was repeated in the presentation that Miller gave at the Fort Collins Area Chamber of Commerce in January of 2012 (personal communication, January 19, 2012), and it was included in his keynote address at the National *Circles* Conference in February of 2013 (Miller, 2013c).

### **Critical Race Theory**

CRT expands the discussion in which *Circles* and *Bridges* has engaged—such as the culture of poverty paradigm—and allows for a perspective that embraces a holistic understanding of systemic issues that create and maintain poverty.

Delgado and Stefancic (2012) outlined main tenets of CRT as follows:

- 1) Racism is the usual way society operates, and the everyday experience of most people of color in this society. With it are color-blind notions of equality.
- 2) Racism serves a useful purpose for large segments of society, and thus it's difficult to remedy.
- 3) Race is a socially constructed concept.
- 4) Dominant society will racialize different groups at different times depending on their needs and the labor market.

CRT can be distinguished from many other academic theories in that it attempts not only to explain a social situation, but to change it, allowing for the potential of transformation (Delgado & Stefancic, 2012). I contend that CRT is a valid approach in the study of community-based poverty alleviation programs in the same way Milner (2013) suggests it is valuable in exploring issues surrounding students in poverty:

...not to suggest that people are in poverty because of their race but to demonstrate how race can be a salient factor in how people experience and inhabit the world....we should work to eradicate poverty for all students, not just students of color. However, we need to understand why a disproportionate number of students of color live in poverty and are from lower socioeconomic backgrounds.  
(p. 1)

Parker and Lynn (2002) discuss the three components of CRT's goals. First, CRT allows for the presentation of narratives which are valid ways to examine racism in society as well as in law; secondly CRT enables us to recognize that race is a social construct, while working to end oppression; and third, CRT gives us the ability to connect the dots between racism and other forms of oppression.

Critical legal studies and radical feminism both provided a backdrop for the development of CRT; philosophers, theorists, and activists such as Michel Foucault, Antonio Gramsci, Sojourner Truth, Frederick Douglass, César Chávez, and Martin Luther King, Jr. informed its foundation (Delgado & Stefancic, 2012). It began as a response to perceived deterioration in the impact of landmark civil rights cases, and the awareness of more subtle types of racism (Delgado & Stefancic, 2012).

I note that CRT is not yet being utilized in social work as extensively as it is in other fields, such as education<sup>7</sup>. In fact, Delgado and Stefancic (2012) discuss the spread of CRT from law into other fields such as education, ethnic studies, and sociology, but they do not even mention social work. Yet, Ortiz and Jani (2010) argue for the implementation of CRT in social work education programs, because CRT provides a perspective that:

...addresses diversity issues within the broader social context, one that recognizes social location as a function of institutional arrangements, considers the intersection of multiple subordinating identities, and acknowledges that theories based on broad generalizations do not adequately address the rapidly changing nature of diversity in the United States. (pp. 175-176)

Exploring CRT at this point serves a two-fold purpose. First, I seek to provide the necessary data to the grounded theory study of *Bridges* and *Circles*. Secondly, as a social

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<sup>7</sup> A Google Scholar search using the terms “critical race theory” + “social work” produced 2,300 results; the terms “critical race theory” + “education” produced over 21,700 results.

worker, my hope is that by including CRT in this work, I will provide a venue where CRT is utilized within my discipline.

### ***Bridges and Circles' Uncritical Use of Social Capital***

Foundational to both *Bridges* (Payne, et al., 2009) and *Circles* (Miller, 2008) is the concept of social capital. I include this discussion in the context of CRT, because I believe it important to tease out elements of the concept of social capital in terms of how it is applied to marginalized communities.

Farr (2004) notes that the concept of cultural capital was used by Marx, Weber, Durkheim, and Dewey, but that Pierre Bourdieu (1977) refined the concept. Bourdieu (1986) contended that there were three fundamental ways in which capital could present itself, depending on the field in which it is used:

...as economic capital, which is immediately and directly convertible into money and may be institutionalized in the form of property rights; as cultural capital, which is convertible, in certain conditions, into economic capital and may be institutionalized in the form of educational qualifications; and as social capital, made up of social obligations (“connections”), which is convertible, in certain conditions, into economic capital...(p. 16)

Bourdieu’s use of cultural capital was central to his work in the field of public education. His work emphasized the various ways by which cultural capital and other symbolic forms help to constitute and maintain power structures. Scholarly interpretations differ in the way they characterize Bourdieu’s stance on deficit theory. Giroux (1983) stresses that in Bourdieu’s analysis, “...class control is constituted through the subtle exercise of symbolic power waged by ruling classes” (p. 267). In this sense, Bourdieu’s cultural capital can be thought of as one exemplar of Gramsci’s hegemony. Similarly, Gonzales (2012) emphasizes that Bourdieu’s intention was to expose the institutional biases that exist in schools, but that his concept has been coopted by deficit theorists such as Ruby Payne. Foley (1997) asserts that “...unlike many

American sociologists and Oscar Lewis, Bourdieu's...paradigm contains no psychologizing or moralizing about the working-class' immorality, civic inactivity or pathological family systems" (p. 121).

However, Pearl (1997) treats Bourdieu differently. An important component to Bourdieu's (1990) work is the concept of habitus, or the schema through which individuals understand their relationship to their world. Bourdieu contends that "habitus makes possible the free production of all thoughts, perceptions and actions inherent in the particular conditions of its productions..." (p. 55), and "whose limits are set by the historically and socially situated conditions of its production" (p. 55). Pearl (1997) contends that because Bourdieu's habitus neglects to fully consider the infinite disparities in needs and demands of different groups, "He has developed a highly sophisticated defense of deficit theory while he ostensibly positions himself on the side of equity" (p. 143).

Regardless of the initial interpretation or intent of Bourdieu, Putnam (2000) popularized the notion of social capital, highlighting various components: formal, informal, bridging, and bonding. *Bridges* and *Circles* view social capital as a means for people in poverty to gain more stability by accessing role models of those in middle to upper class. Yet using social capital in this way assumes that a middle class normative society is desirable.

In *Bowling Alone*, Putnam (2000) laments the loss of civic organizations and clubs of the 1950s and 1960s in which social capital flourished. Yet Arneil (2006) contends that for those with marginalized identities, such an idyllic era was nothing more than a myth. Moreover, Arneil states that Putnam's negative analysis of our current divisive society may be inaccurate, proposing that:

Put simply, the central theme in the narrative of twentieth-century America as seen from the perspective of historically subordinated groups may not be one of

“collapse” or “pulling apart” at all but the, as yet, unfinished and, at times, profoundly divisive story of realizing justice in an increasingly diverse society. (2006, p. 3)

Yosso (2005) offers an alternative to Bourdieu’s cultural capital through the perspective of CRT, which she calls “community cultural wealth.” Yosso challenges the normativization of White middle class communities in social and cultural theory, and shifts the emphasis to communities of color in order to examine the several different forms of capital, not considered in a traditional Bourdieuean sense. Yosso’s forms of capital include linguistic capital, or the ability to speak in more than one language; familial capital, or the cultural knowledge important to families; and resistant capital, or those skills necessary to oppose inequity.

### **Recap of Thematic Concept One: *Bridges and Circles*’ Approaches to Intersectionality**

**Data used.** In exploring this thematic concept I utilized the following sources of data:

- Autoethnographic notes from a community training
- Scholarly articles and books, including the work of feminists of color
- YouTube videos
- *Until It’s Gone* (Miller, 2008)
- *More than Just Race: Being Black and Poor in America* (Wilson, 2009)
- *The Color of Class* (Moss, 2003)

**Emerging theme.** At the point of theoretical saturation (Glaser & Strauss, 1967), I noted the following theme: Both *Bridges* and *Circles* have an inadequate and perhaps even dangerous approach to what they consider the “intersections” of poverty with race, gender, and ability, because they use a single lens analysis versus one that is actually intersectional.

## **Thematic Concept Two: Efficacy of the Payne Model (*Bridges*) and *Circles***

### **Introduction**

This section begins with an overview of the *Bridges* and *Circles* events that have taken place in Fort Collins since 2008. It then examines the claims of aha! Process, Inc. and the claims of *Circles*. I remind the reader that *Bridges* and *Circles* were brought to Larimer County as companion initiatives, so they need to be examined together. Yet, because they are utilized differently, I separate my analysis of them where appropriate and for clarity.

### **Chronicle of aha! Process Events in Larimer County**

In chapter one, I mentioned the local Fort Collins production of “Life on a Shoestring: Perspectives on Stepping out of Poverty,” a series of 40 events, including lectures, theatrical performances, and panel discussions (Reed, 2008) which addressed poverty in Fort Collins. That series, sponsored by Beet Street, a local arts promoter and WomenGive, a leadership initiative of United Way of Larimer County in partnership with the Women's Foundation of Colorado, included a lecture by Philip DeVol (Hughes, 2008). It marked the beginning of our community’s introduction to both DeVol and the *aha! Process, Inc.* methods.

In December of 2010, DeVol returned to Fort Collins this time at the invitation of the Fort Collins Area Chamber of Commerce and Bohemian Foundation, to talk specifically to business leaders. In response to that visit David May, the president and CEO of the Fort Collins Area Chamber of Commerce wrote an opinion piece for the *Fort Collins Coloradoan*, applauding DeVol’s approach, and asserting that “he gets it” (2011).

In May of 2011, Bohemian Foundation and the Fort Collins Area Chamber of Commerce partnered with United Way of Larimer County to hold a two-day workshop for over 200 community leaders in the *Bridges out of Poverty* methods (Young, 2011). The workshop,

featured Terie Dreussi Smith, who, along with Ruby Payne and Philip DeVol, wrote *Bridges out of Poverty* (2009). In June of 2011, DeVol delivered a keynote address for the United Way's *State of the Community* luncheon (Thibedeau, 2011). The *Bridges for Businesses* training which I attended in July of 2011 (see chapter one) was a one-day training specifically for businesses, again featuring Smith.

The following November, Bohemian Foundation organized a community launch of *Bridges out of Poverty* and *Circles Larimer County*. This event featured prominent city figures, such as Darin Atteberry, Fort Collins City Manager; Tony Frank, Colorado State University President; Andrew Dorsey, Front Range Community College President; David May, President and CEO of the Fort Collins Area Chamber of Commerce; and Jerry Wilson, Superintendent of Poudre School District (NCBR staff, 2011). A press release on Bohemian Foundation's website, quotes Sarah Hach, Director of Community Programs as saying, "Bohemian Foundation decided to launch *Bridges out of Poverty Northern Colorado* and *Circles Larimer County* as joint initiatives because they share similar strategies designed to produce high-impact results through community-wide training, collaboration, and public engagement" (Jackson, 2011). Both were funded as two-year pilots. *Bridges out of Poverty Northern Colorado* was administered by Bohemian Foundation through its Community Programs, while Bohemian provided the Education and Life Training Center (ELTC) with a two-year grant to manage *Circles Larimer County* (Jackson, 2011).

In January of 2012, the Chamber of Commerce again partnered with the Bohemian Foundation, this time bringing Scott Miller to Fort Collins to discuss the local launch of *Circles Larimer County*, the second *Bridges/Circles* event I attended. In 2012, there were five full-day trainings in Fort Collins and Loveland, focusing on community-wide, education, business, and



government sectors (Bohemian Foundation, 2011). I attended one of those trainings, which Jodi Pfarr of aha! Process, Inc. and Scott Miller both facilitated. Scott Miller discussed *Circles* along with key participants of *Circles Larimer County*. According to a Fort Collins Coloradoan story, Sarah Hach of Bohemian Foundation stated that a total of 1,300 people in the community were exposed to *Bridges* and/or introduced to *Circles* in community trainings during 2012. (Kyle, 2013).

In 2013, Bohemian Foundation hosted both a community training and a *Bridges for Businesses* training in May and an advanced *Bridges* training in September. The latter training, which I attended, featured Jodi Pfarr, and it explored the “intersections of poverty and the ‘isms,’” as discussed in the previous section. Another Community-wide training was scheduled in May of 2014.

The following table highlights all of the *Bridges* trainings that have taken place in Fort Collins prior to and throughout the two-year pilot:

**Table 1: Bridges out of Poverty Northern Colorado/Circles Larimer County Events, 2008-2013**

<b>Date</b>	<b>Event</b>	<b>Audience</b>	<b>Details</b>	<b>Sponsors</b>
2008	“Life on a Shoestring: Perspectives on Stepping Out of Poverty,”	Community-wide	Forty events: lectures, theatrical performances, and panel discussions. Phil DeVol was a speaker (Researcher attended several events)	Beet Street WomenGive
December 2010	Philip DeVol	Business Leaders	Lecture	Fort Collins Area Chamber of Commerce and Bohemian Foundation
May 5 & 6 2011	Teri Dreussi Smith	Over 200 Community Leaders	Workshop	Fort Collins Area Chamber of Commerce United way of Larimer County Bohemian Foundation
June 14, 2011	Philip DeVol	Community Members, United Way Supporters	United Way’s State of the Community luncheon	United Way of Larimer County
July 2011	Teri Dreussi Smith Regina Fetterolf Lisa Falcone	Bridges for Businesses	Business Leaders (Researcher attended)	Bohemian Foundation
November 4, 2011	Local Community and Business Leaders	Community Launch	Local Community and Business Leaders	Bohemian Foundation United Way of Larimer County Fort Collins Area Chamber of Commerce
January 2012	Scott Miller	Business Leaders and Community	Breakfast at the Chamber of Commerce (Researcher attended)	Fort Collins Area Chamber of Commerce and Bohemian Foundation
May-October 2012	Jodi Pfarr, Scott Miller, Various Speakers	Business, Education, Community, Government	Trainings for over 1,300 community members (Researcher attended Bridges for Government)	Bohemian Foundation
May 2013	Bridges out of Poverty, Community Training Jodi Pfarr, Scott Miller	Community-wide	Specific focus on: Nonprofit Organizations, Faith-based Organizations, and Community Members	Bohemian Foundation
May 2013	Bridges for Businesses	Business Community	Business focus	Bohemian Foundation
September 2013	Advanced Bridges out of Poverty Training Jodi Pfarr	Nonprofit Organizations, Community Members	Community members, city employees, and agency staff who attended a prior Bridges training (Researcher attended)	Bohemian Foundation
May 2014	Bridges out of Poverty Community Training (scheduled) Jodi Pfarr	Community	Community training	Bohemian Foundation

In addition to these trainings, Bohemian Foundation continues to offer free trainings for businesses that request it (Bohemian Foundation, 2010). Bohemian Foundation also began funding a “navigator program” in January of 2013, set up at Columbine Health Systems (Kyle, 2013). While it is outside of the scope of this thesis to thoroughly examine the concept of navigator program, the reader will recall from chapter one that I was introduced to the concept of the navigator program in July, 2011 at the *Working Bridges* training. In short, a “navigator” is the name given to a position in an organization that merges the role of a human resource officer with that of a social worker. Their role, in part, is to connect low wage workers with state sponsored resources.

### **Does the Payne Model Work?**

Reviewing the number of *Bridges* and *Circles* trainings and workshops, and noting the significant resources that have gone into these trainings, I began to question whether these models had any sort of a proven track record. As we saw in chapter two, there are sound academic critiques of the Ruby Payne model, but there is less written about whether or not it actually works. I wanted to investigate whether or not the Payne model reduces poverty and makes our schools and communities more equitable, as Payne claims. My next pieces of data were gathered from the aha! Process, Inc. website; from there I analyzed their statements and conducted further research.

**Does the Ruby Payne model work in schools?** According to the latest edition of *A Framework For Understanding Poverty* (Payne, 2013), there was a peer-reviewed study based on seven years of data conducted by Dr. W.W. Swan that aimed to answer this question. Payne quotes Swan in *A Framework* as follows: “The large number of statistically significant findings

for the Payne School Model strongly supports the efficacy of the Model in improving student achievement in mathematics and English/reading/literacy/language arts” (Swan, n.d.-h, p.2).

I obtained the study, which was actually seven separate reports (Swan, n.d.-a, n.d.-b, n.d.-c, n.d.-d, n.d.-e, n.d.-f, n.d.-g), summarized with a two page document (Swan, n.d.-h), which included the quote above. I noticed that, rather than seven years of data being included, as Payne indicated in *A Framework*, there was only really three years of data, school years 2003-2004; 2004-2005; and 2005-2006. Additionally, there was not three years of consistent years of data from all of the schools studied. For example there was data from Ridgewood Middle Charter School from the 2003-2004 and the 2004-2005 school years, but all of the other schools, such as Hutchinson Public Schools included data from only one school year, 2005-2006. There was a school in Indiana that was studied from 2001-2003, but that data was not included in the summary. What Payne claimed was a seven-year study, was in fact, a study in which data was collected over various schools for six years, but the summary in which the quote above appeared only included data from three school years (Swan, n.d.-h).

In addition to Swan’s information, I obtained another piece of data regarding the study: the 990-PF income tax form filed to the Internal Revenue Service by the Center for Study of Economic Diversity in 2009. I was struck by two features of the report. First, aha! Process, Inc. is listed as a significant contributor to the Center for Study of Economic Diversity, and among those on the board of directors is not only Philip DeVol, but Ruby Payne herself. The organization dissolved in 2007, with over \$94,000 of assets<sup>8</sup> (Center for Study of Economic Diversity, 2009). I sensed that this represented a potential conflict of interest, but I was also unsure about how common such a practice was. I knew I needed more information.

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<sup>8</sup> The Center for Study of Economic Diversity donated all of its remaining assets to the Marshall University Foundation in 2009.

In order to more fully understand Swan's research, I decided to interview Marc Winokur, Director of the Social Work Research Center at Colorado State University. My interview with Winokur (personal communication, March 7, 2014), would be added to my grounded theory data.

Winokur indicated that although it was common for a company to establish its own research arm, it is something that should be transparently indicated in the research, which was not done in the case of the Swan study. In terms of the data itself, in addition to sharing my concerns about data collection methods, Winokur also identified four problematic areas in the report itself. First, the study uses a "statistically significant" sample size rather than "practically significant." A practically significant sample size is a more accurate indicator because it relates to the effect size, rather than simply the size of the group. Secondly, there is an indication of researcher bias in language such as "the results show efficacy..." Third, there is no indication of generalizability from the findings. Finally, there is not enough consistency across reports to adequately draw the conclusion that Swan drew in his summary, as Payne (2013) quoted. Thus, Payne's citation of the study in *A Framework* was inaccurate and misleading.

**Does the Ruby Payne model work in the community?** The aha! Process, Inc. website makes clear that *Bridges* is not a program. Rather, "It is a set of comprehensive constructs and strategies that can be used by programs and initiatives that aim to help people move out of poverty and build sustainability" (aha! Process, Inc., 2014b). Indeed, after the first Fort Collins training in May of 2011, one key participant was quoted in the local paper as saying that she was most struck by the fact "that it was not a program but a model" (Young, 2011).

Such a "construct" or "model" is inherently difficult to measure. But the aha! Process, Inc. website claims success by giving examples of two organizations that are using the construct

with quantifiable results: Columbiana County Municipal Court in Lisbon, Ohio and Cascade Engineering in Grand Rapids, Michigan (aha! Process, 2014b). The reader will recall that *Bridges* is used nationwide. Two success stories are merely anecdotal and do not provide conclusive evidence regarding the efficacy of the model.

The latest edition of *A Framework* discusses the success of a YMCA program in Saint Joseph County, Indiana called “Bridges out of Poverty/Getting Ahead.” In the categories of income, education, employment and support systems, “positive change” of up to 84% is cited (2013, p. 171), but the study neglects to mention how many people were included in the sample, nor does it attempt to conceptualize what is meant by “positive change.”

### *Circles*

I now return to *Circles*. As mentioned earlier, in Fort Collins and Larimer County, *Circles* and *Bridges* were companion initiatives. As such, it is important to look at them together in order to ascertain their impact on our community. *Circles* is also independent of *Bridges* in many ways, so it is also necessary to fully understand how *Circles* works. While chapter two of this thesis examined the structure of *Circles*, this section is concerned with how it functions in practice.

***Circles’ goals.*** In order to adequately assess the efficacy of *Circles*, I began by examining its goals as articulated by Miller, which upon further examination seemed inconsistent. The front cover of *Until It’s Gone* (Miller, 2008) states that the goal is “Ending Poverty in our Nation in our Lifetime.” In fact, chapter one is called “Not ‘Reduce Poverty—End Poverty.’” Miller insists that:

Framing our work in terms of ‘ending poverty’ rather than ‘reducing poverty’ keeps us from colluding with the assumption that it’s acceptable to have some poverty—from thinking that we are incapable of building a society without poverty. Is *some* poverty acceptable? No more than *some* racism, *some* cancer or

*some* gang violence—*some* shootings in *some* school buildings or *some* terrorism in *some* states. (2008, p. 3)

The clear emphasis on ending poverty in the passage above, seems to have become somewhat diluted over time, depending on the context. The following chart shows how the stated goal of *Circles* appeared in 2009, 2012 and 2014:

**Table 2: *Circles*' Changing Goals**

<b>aha!Process,Inc. Website 2009:</b>	<b>aha!Process, Inc. Website 2012:</b>	<b>Circles USA Website Accessed in 2014:</b>
<p>Circles is a high-impact strategy that will:</p> <ul style="list-style-type: none"> <li>• Change the mindset of the community so it wants to end poverty.</li> <li>• Change goals, policies, and approaches to end poverty.</li> <li>• Empower people in poverty to help solve community problems while transitioning out of poverty themselves. (aha! Process, 2009)</li> </ul>	<p>The Circles™ Model aims to :</p> <p>(1) change the mindset of the community so it wants to and thinks it can end poverty;</p> <p>(2) change the goals (policy, law) of the system to end poverty; and</p> <p>(3) empower people to self-organize. (aha! Process, 2012b)</p>	<p>Circles engages entire communities in owning the solution to poverty.</p> <ul style="list-style-type: none"> <li>• Mobilizing families to achieve economic stability through the long-term and consistent support of peers and volunteers from the community</li> <li>• Developing the leadership of people moving out of poverty to inform community-wide solutions to addressing poverty</li> <li>• Addressing the community and program barriers faced by families trying to move out of poverty (Circles USA, n.d.-c)</li> </ul>



On the 2009 and 2012 websites, the first bullets referred to ending poverty. In 2009, the last bullet had to do with “transitioning people out of poverty,” while in 2012, it was “empowering people to self-organize.” In 2014, there was no mention of “ending poverty,” but only of developing “solutions to addressing poverty,” a much weaker message. Additionally, in 2014, the first bullet was focused on families and not the community, changing the focal point of the problem of poverty from communities to families.

Elsewhere on the Circles USA website (Circles USA, n.d.-c), another goal was included: “To inspire and equip families and communities to resolve poverty and thrive,” but even that language isn’t as direct as “ending poverty.” Yet, the Circles New Mexico website (Circles New Mexico, n.d.-a) accessed on March 5, 2013, featured bullets identical to the aha! Process, Inc. 2009 website.

A November, 2013 radio interview with Miller (Spitz, 2013) did open with the “end poverty” language. Additionally, on February 19, 2013 while giving the Circles National Conference keynote address, Miller talked specifically about moving 1.6 million children out of poverty nationwide (Miller, 2013c). His language, however, is much weaker in an April, 2012, YouTube video regarding funding partners known as National Development Centers (NDCs):

So it’s an exciting time. These NDCs are going to be the beginning of innovation engines that we believe will tip the entire country to understanding, that we can and we should help families out of poverty. And it actually could be possible to eradicate poverty from our nation sometime in the future. (Miller, 2012e, 4:20)

Although difficult to ascertain the reasons behind such inconsistent language, it is worth noting that without a clear goal, it is difficult to measure outcomes.

**Navigating in Circles.** In *Until It’s Gone*, Miller (2008) claims that “Reading this book will show you that there’s a concrete plan to follow to change both your life and your community in ways that can help to reduce, and eventually, eliminate poverty” (p. 23). Yet, the book offered

me no concrete plan. It did outline the structure, whereby people in poverty, known as leaders are matched with people in the middle-to-upper class, known as allies. Leaders make financial and other goals, and allies help them achieve these goals. There is also a “big view” component, where monthly organizing is carried out around structural issues (Miller, 2008). Miller (2008) also notes that: “Although the process of helping a family out of poverty is complex, the concept of Circles is not, making it attractive for many” (p. 6). Miller never discusses systemic causes of poverty, but claims that they will organically arise as each up as families is coming out of poverty, or that they will identified in big view.

Leaders are generally referred by agencies, or work force centers (personal communication, S. Miller, January 19, 2012), and they must undergo an interview process (Spitz, 2013). Freire (1970) offers a contrasting opinion of choosing leaders from an oppressed community, suggesting that this has the effect of being divisive and inhibiting larger-scale movements for social justice:

The oppressors do not favor promoting the community as a whole, but rather selected leaders. The latter course, by preserving a state of alienation, hinders the emergence of consciousness and critical intervention in a total reality. And without this critical intervention, it is always difficult to achieve the unity of the oppressed as a class. (p. 143)

In chapter two of this thesis, I mentioned a *University of New Mexico National Circles Campaign Report* (Collier & Lawless, 2012) released in January of 2012. The following March, only the executive summary appeared on the *Circles* website (Circles National Campaign, n.d.). As of April, 2014, the *Circles* website contains only one paragraph from the report:

We concur with the conclusions offered in the 2009 Oregon Assessment Report that the Circles® model continues to be strongly endorsed, is creative and flexible. We add that with expanded attention to contextual and structural barriers, the theoretical basis in social capacity building is sound. We further note that the leadership and staff have a realistic, valid and practical view of poverty. For instance the leadership defines poverty and prosperity as the joint responsibility of

societies, institutions, communities, as well as individuals. It is noteworthy that the leadership is committed to apply results from the formative evaluation to guide training and curriculum revision and expansion. (Collier & Lawless, 2012)

Elsewhere in the executive summary were critiques of *Circles*' use of the Payne materials and concrete recommendations that new training materials be written (Collier & Lawless, 2012). Lawless' (2012) dissertation was based on research obtained during the *Circles* evaluation, and Collier (2014) wrote a chapter in a text reviewing *Circles*' evaluation methods and detailing the need for new training materials. The new training materials for *Circles* were set to be written by Collier and Lawless (Collier, 2014; Lawless, 2012).

The extensive research conducted by Collier and Lawless (2012) for the *University of New Mexico National Circles Evaluation Report* included 90 interviews at seven *Circles* sites across the country. It was formative in nature, and its focus was on training materials, relationships, and power dynamics (Collier & Lawless, 2012). The efficacy factors of *Circles* were outside of the scope of the study, as was an analysis of the claim to "End Poverty in our Nation in our Lifetime" or data that verified that claim. As mentioned, the New Mexico evaluation was formative in nature, but it did reference a summative evaluation that was in place (Collier & Lawless, 2012). As of March 5, 2014, there was no mention of such a summative evaluation on the Circles USA website (Circles USA, n.d.-c).

**Invoking the high cost of poverty.** In discussing the social and economic cost of poverty, Miller frequently cites a study by the Center for American Progress (Holzer, Schanzenbach, Duncan, & Ludwig, 2007), which determined that the residual cost of children in poverty to the United States is roughly \$500 billion per year. The marketing language that Miller uses in citing the study is worth examining:

...our nation spends **\$500 billion dollars** [emphasis in the original] a year on the fall-out from children raised in poverty. *For a fraction of the cost*, [emphasis

added] Circles provides an opportunity to develop a powerful new approach to helping families out of poverty, reduce wasteful spending and increase the number of economically stable households in every community that adopts Circles. (Circles National Campaign, 2011, p. 1)

The term “for a fraction of the cost” is more appropriate for an infomercial than a poverty alleviation campaign; I began to wonder what it was that Miller was really trying to sell.

Another way in which Miller uses that \$500 billion figure is to tailor it to a particular community. To do this, he divides the \$500 billion by 12.9 million, which he claims is the total number of children in poverty in the United States, resulting in \$38,760 per child (Circles New Mexico, n.d.-b). He then takes that number and multiplies it by the number of children in poverty in different communities in order to calculate the specific cost for that community. So, for example at the January, 2012, Chamber of Commerce meeting in Fort Collins, Miller told attendees that the cost in Colorado for children in poverty is \$8.2 billion and \$311 million in Larimer County (personal communication, January 19, 2013), while in Albuquerque, according to Miller, the cost is \$1.6 billion (Miller, 2013c). In actuality, the authors of the Center for American Progress report never broke down their \$500 billion figure in such a per-child manner (Holzer, et al., 2007), and the complexities in the study would make it nearly impossible to do so. Additionally, the study includes tangible, concrete recommendations that are virtually ignored by Miller:

The creation of higher wage jobs (through higher minimum wage, more collective, bargaining, etc.), income supplementation (especially for working parents, along the lines of EITC or earnings disregards for welfare recipients), education and training policies (including early education, class-size reduction, teacher training, or other reforms), neighborhood revitalization and housing mobility...high quality pre-kindergarten programs universally available to children...(p. 18)

Such concrete solutions—which rely on larger scale organizing and demand systemic economic change—are not a component of the *Circles Campaign*, unless they happen to come up organically through big view or in individual circles (Miller, 2008).

**The tipping point.** While viewing a *Circles* YouTube video from February, 2012, I noticed that Miller referenced another report, this time a 10% tipping point study conducted by researchers at Rensselaer Polytechnic Institute (RPI):

There was some interesting research done by Rensselaer Polytechnic Institute on “what is a tipping point that moves a network in a new direction?” And they are saying that a 10% minority opinion that is held strongly enough over a period of time actually moves an entire network towards that opinion. If the opinion that you’re trying to effect is that we can and we should get families out of poverty, then we want to make sure we’re having about a 10% goal set. For example, in one of our National Development Centers, their county’s population includes 8,000 children in poverty. So the target could become: “What would it take to get 800 children out of poverty over a 5 year period? What kind of resources, what kind of scaling up of high impact strategies like Circles? What would it take to make that work?” (Miller, 2012d, 1:55)

A quick internet search produced a document from the RPI’s website, which highlighted the study. Indeed, the brief overview stated that the scientific study, which used computational and analytical methods, concluded that when a committed minority in a society holds an unshakeable belief, and that minority grows to over 10%, the idea spreads extremely rapidly. They cited events in Egypt and Tunisia as current examples (Rensselaer Polytechnic Institute, 2011). I retrieved an academic paper regarding the study, but it proved to be too technical for me to adequately analyze. In order to fully understand the study, I obtained Institutional Review Board approval to interview Boleslaw Szymanski, one of the scientists who conducted the study, on February 24, 2014.

Prior to speaking with Szymanski, I looked more closely at Miller’s quote above, and I noticed that he appears to be using the tipping point concept in two ways. First, he is using it to

describe the act of getting out of poverty: "...their county's population includes 8,000 children in poverty. So the target could become: 'What would it take to get 800 children out of poverty?'" Secondly, he is using it to describe movement in public opinion: "If the opinion that you're trying to effect is that we can and we should get families out of poverty, then we want to make sure we're having about a 10% goal set." He weaves these two things together so that there is an underlying assumption that if 10% of children were to get out of poverty, there would be an accompanying 10% of the population that believes that "we can and we should get families out of poverty."

To Miller's first use of the tipping point, Szymanski suggested that it isn't necessarily an accurate application of the study because people might be able to get entirely out of poverty, "but they may not be committed to applying the same transmission which they benefited from to others" (personal communication, B. Szymanski, February 24, 2014). In regard to the language used in Miller's second application of the findings, Szymanski stated:

I think that's simplified because what you believe is not enough. You need to be actively working towards removing poverty. If you have 10% of the population actively arguing with friends, getting engaged in movements, getting engaged in legislation, engaging in actively helping other people, that's the kind of commitment that we looked at in our theoretical work. And that would be much closer to what the essence of our research is. Just being sympathizers, thinking that poverty is not good but not doing anything about it is not enough. (personal communication, February 24, 2014)

He went on to say, "The 10% is in ideal conditions if everyone is connected to everybody to guide us, and then the real life situation may raise or lower the percentage. It's only absolute in the ideal world and the world is never ideal." Szymanski also shared with me the results of an April, 2012 RPI published study (Sreenivasan et al., 2012), which indicated that if there are competing viewpoints or opposite minority points of view, then the number required to reach the tipping point increases. For instance, if people in society have a negative understanding of

people in poverty then the number of those who work to eliminate poverty needs to be greater: “We might need percentage as high as 16-25%, when the opposite opinion exists” (personal communication, B. Szymanski, February 24, 2014). The second study also emphasized complications created by levels of commitment. Szymanski did emphasize that poverty alleviation could be a good application for the study, but it must not be oversimplified in its application. He reinforced the need for commitment rather simply being a sympathizer to a cause.

Miller made use of the tipping point in an April, 2012 television interview in a general manner, without citing Rensselaer, further decontextualizing the information in the framework of the study: “We’re seeing that if you really want to solve poverty, you need to figure out a way to get at least 10% of the problem solved before you can solve all of it” (Miller, 2012a)

I noticed, while viewing a YouTube video of the Circles National Conference in February, 2013, that Miller made reference to the 10% tipping point study but neglected to mention the second study:

If you held strongly to the belief that we can and we should eradicate poverty in this country and then be a leader in the world about that whole thing. If you held on to that long enough and talked to enough people long enough, Rensselaer Says it tips. It’s not like it takes any more than 10% according to Rensselaer. Again this is pretty exciting. (Miller, 2013c, 6:54)

Reference to the 10% tipping point also appears on the Circles New Mexico’s website, again without mention of the second study and only referencing the importance of beliefs rather than social movements:

The goal is to use Circles to help at least 10% of all children and their families move out of poverty in Bernalillo County before the end of the decade. Research from Rensselaer Polytechnic Institute claims that new beliefs such as *we can and should help all families in our community out of poverty*, can generate action when 10% of the group holds fast to that belief. By helping 4,000 children and their families in New Mexico, and 1.5M children throughout the nation, Circles

will create a tipping point in communities to permanently change how we approach poverty. This will move us toward eliminating poverty altogether (Circles New Mexico, n.d.-a, para. 5).

**Retiring baby boomers.** The last two sections have highlighted the ways in which Miller used the Rensselaer Polytechnic Studies (Sreenivasan, et al., 2012; Xie et al., 2011) to illustrate how we need only to convince 10% of the population that poverty can be eradicated in order to end poverty, and also how Miller used the Center for American Progress' (Holzer, et al., 2007) figure of \$500 billion as the cost of poverty to market *Circles*. Additionally, we saw how he used these two tools inaccurately. We now turn to an economic approach that Miller employs to promote the potential of *Circles*. This approach is different than the two described above in that Miller is an active collaborator with the designer of the approach, Mark Lautman. Listed on the "Staff and Consultants" page of the Circles New Mexico website (Circles New Mexico, n.d.-c), Lautman directs the Community Economics Lab, a private not-for-profit think tank which describes itself as an organization that "innovates new approaches to economic development to work in a labor and capital constrained economy," and he wrote a book entitled *When the Boomers Bail: How Demographics will Sort Communities into Winners and Losers* (Lautman, 2011). On his website, he is credentialed as an "author, speaker, and economic architect," and his biographical statement indicates that he has an undergraduate degree in economics, architecture and geography (Lautman, n.d.). By all indications, Lautman is a developer, not an economist. Yet he appears to be the sole economic advisor to *Circles*.

Lautman appears on several of *Circles*' promotional YouTube videos (Miller, 2011c, 2012b, 2012c), wedding his economic development ideas with *Circles*' claim of ending poverty. The main premise of Lautman's (2011) book is that within the next 20 years, this country will see 78,000 baby boomers retiring. This is complicated by the fact that baby boomers were the



first generation that did not have enough children to replace themselves. Because of this demographic shift, the situation will create a demand for a qualified workforce. Communities will be competing for these qualified workers, trying to steal them from each other, and in some cases, Lautman claims: “It will turn into a demographic civil war” (p. xv). There are qualities which Lautman contends that communities must have in order to attract these qualified workers, and there is a formula that Lautman cautions communities to implement in order to come out on the winning side of this civil war, that is:  $E > P$ , where  $E$  = economy, and  $P$  = population (p. 1).

In order to adequately analyze Lautman’s premise in the context of *Circles*, I interviewed Ramaa Vasudevan, PhD., associate professor in the Department of Economics at Colorado State University on March 17, 2014. I gave Vasudevan a brief overview of *Circles*’ structure and then we viewed a YouTube video featuring both Miller and Lautman (Miller, 2011c). The video highlighted the consequence of 78,000 baby boomers leaving the workforce, and how this would create a demand for skilled labor. According to the video, the sector of economic development has historically focused on growing “E” side, whereas work force development, health care, and education on the “P” side of the formula. With this changing demographic, insists Lautman, the two sectors will be forced to cooperate. Businesses will have to train skilled employees, and will cooperate with the education sector to do that. This is already happening to some degree at the community college level, where businesses have asked that certain curriculum be written, and that needs to be expanded upon. In order for communities to thrive, they must have more economic base jobs, or jobs that create goods that are exported out of the community, than service sector jobs. Lautman stresses that *Circles* has a role to get people ready for the workforce, particularly people who have been out of the workforce for so long that they are beginning to become demoralized. Lautman refers to *Circles* as “technology,” and states that

communities are going to learn to use that technology in order to make highly skilled workers out of those “who right now can’t pass a drug test or aren’t prepared to come to work” (9:44). If they don’t, according to Lautman, communities will fail. Ending poverty is no longer only a humanitarian effort, but an “economic, patriotic, save the community agenda” (10:09) which will make it easier for *Circles* to raise money and recruit volunteers.

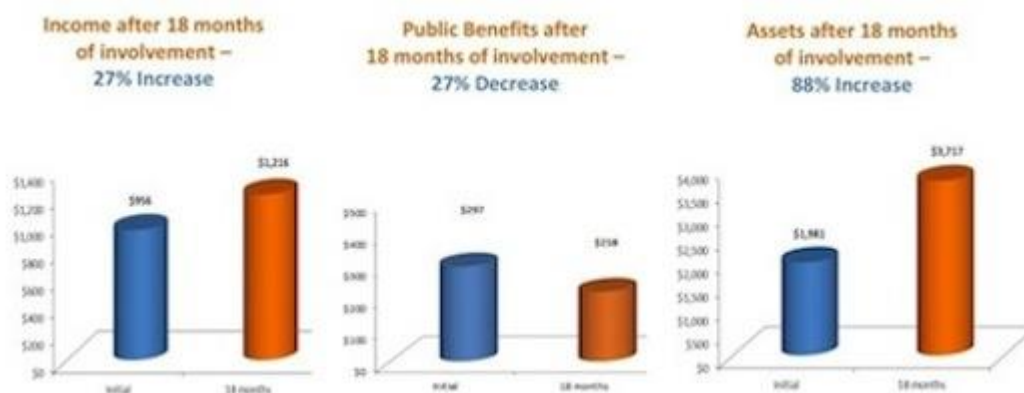
Vasudevan (personal communication, March 17, 2014) objected to Lautman’s model, in general, because it discussed macro problems and presented solutions that included only individuals; she cited three areas of concern and included several insights. First, while it’s true that people who are experiencing long term unemployment become demoralized, it is macro problems, such as the persistence of the recession, that have landed them there, not bad choices. Social services are necessary to help mitigate the problems associated with poverty, but the solutions to poverty will have to be macro and policy oriented, such as the implementation of a living wage.

Secondly, this assumed partnership between “developers” (Lautman’s term for employers or capitalists) and the social service sector will not take place without policy that requires it. Large scale employers are not committed to investing in their workers, as they are seen as expendable. It is to the employer’s benefit to maintain a large pool of unskilled workers who can be easily replaced. Manufacturing jobs in the United States have been relocated overseas in order to have access to cheaper labor; again, a macro problem that requires national policy solutions and cannot be resolved at the community level. Furthermore, Lautman cannot conclude that income growth reduces poverty without considering distribution. If the income continues to be concentrated at the top 10% of wage earners, poverty will not be alleviated.

Third, circumstances created by the aging baby boomer population are not being realistically addressed. Many people will extend their retirement age, not because they want to, but because they cannot afford to do otherwise. Once baby boomers do retire, some service sector jobs will be created, as retiring boomers will need to be cared for, but this will also increase the needs of Social Security and Medicare, both federal policy issues.

In addition to the information that I obtained from the interview with Vasudevan, I found Paulo Freire's work to be insightful in this context. The partnership that Miller and Lautman were describing above, one in which the business sector works with the education sector to write curriculum, is precisely what Freire (1970) described as "banking education," in which our educational system becomes a tool of capitalists to create a workforce that is complacent and uncritical of systems of oppression. In this analysis, it is absolutely the case that low incomes would be maintained.

***Circles' efficacy data.*** When quantifying the effectiveness of *Circles*, the following piece of data was frequently cited by Miller and other *Circles* advocates: "Early results demonstrate that for every \$1 spent on the program, \$2 in welfare and food stamp subsidies was returned to the state, and \$4 to the community as new earned income" (Mead, 2011; Miller, 2011d; Move the Mountain, 2011). While those figures might be straight-forward, their source is a bit more elusive. There is no indication of where they actually came from. Currently, no such figures are displayed on the Circles USA website (Circles USA, n.d.-c). The "results" tab of the Circles USA website consists of multiple testimonials and contains no data, with the exception of one graph that is difficult to read and without context. The graph is pasted below as it appears on the website (Circles USA, n.d.-h):



**Figure 6: Impact data from the Circles USA website**

Not only is the graph extremely blurry on the website, but it does not stipulate whether *Circles* is referencing progress made for the most recent 18 months or if they are giving us an average for all people who stay in the program for 18 months. Furthermore, there are no sources cited for the information on the graph.

Further evidence that Miller is reluctant to use data can be found in a November, 2013 radio interview (Spitz, 2013). In that interview Miller balked at the necessity of using hard data, citing an article called *Expanding the Evidence Universe* (Schorr & Farrow, 2011), and emphasizing the cost associated with randomly controlled trials. In perusing that article, I found that Schorr and Farrow (2011) do call into question randomly controlled trials based on the medical model, but emphasize the need for innovative and equally rigorous methods of gaining information about complex interventions:

Gathering evidence about this more intricate array of interventions means requiring that they have a structured process to define desired outcomes, articulate the pathway to reach those outcomes, track progress, learn in real time why progress does or doesn't occur, and document learning in a way that can be shared and applied. (p. 47)

During the interview, Miller does not discuss the importance of evidence emphasized in the Schorr and Farrow work at all, implying only that they were simply discounting data driven

research methods. Indeed, Miller offered no data about the efficacy of *Circles* (Spitz, 2013), even though *Circles* had been underway for six years at that point.

In a 2011 CBS news clip about *Circles*, which Miller uses as a promotional video, there is discussion of the dropout rate of leaders, generally 58% (Miller, 2011a); at the January, 2012 meeting at the Fort Collins Area Chamber of Commerce, Miller responded to a question about the significant attrition rate by saying that some leaders are “simply not ready” (personal communication, January 19, 2012). Lawless (2012) points out that there is no mechanism for contacting leaders who have dropped out, making it difficult to draw any conclusions about reasons for such a high attrition rate.

The CBS news clip mentioned above highlighted a Springfield, Ohio *Circle* site, specifically a leader named Stacy, and her ally, Marsha. Stacy entered *Circles* as an unemployed single mother of 4 children, receiving food stamps and \$400 in public assistance per month. Marsha helped Stacy update her resume and find a job, and by the end of the clip, Stacy was working full-time, making \$1150 a month, and receiving no public financial assistance, other than \$200 in food stamps per month (Miller, 2011a). There was no discussion about the inequity inherent in a system that allows people to work full time and still earn such a low wage that they must rely on food stamps. As mentioned, *Circles* is using this CBS clip as a promotional video; it remains on both the Circles USA and the ELTC websites (Circles USA, n.d.-c; ELTC, 2012). It appears that this story is considered a significant measure of success for *Circles*.

In March of 2012, during a local Fort Collins community radio interview with Miller, Sarah Hach of Bohemian Foundation stated that: “studies show it takes two years of concerted effort to move out of poverty” (La Rue, 2012). At the National Circles Conference in February

of 2013, Miller indicated that it could take quite a bit longer: “If it takes seven years, who cares? At least there’s a path, right?” (Miller, 2013c, 2:59).

### **Recap of Thematic Concept Two: Efficacy of *Bridges* and *Circles***

**Data used.** In exploring this thematic concept, I utilized the following pieces of data:

- Autoethnographic notes and memos
- Interviews
- Academic material
- YouTube videos
- Reports
- Website data
- IRS forms

**Emerging theme.** At the point of theoretical saturation (Glaser & Strauss, 1967), the following theme emerged: There is inadequate and unreliable data to indicate that *Bridges* and *Circles* are effective in alleviating or ending poverty.

### **Thematic Concept Three: *Circles* for a New Age**

#### **Introduction**

In the absence of a clear indication about how *Circles* would “end poverty in our nation in our lifetime” (Miller, 2008, front cover), I began to explore the logic underlying Miller’s claim. What emerged in my data was evidence of a New Age thought coupled with relentless positive thinking, premised on the myth of meritocracy.

#### **A New Age Salary**

I began by writing memos that examined the language that Miller (2008) uses in *Until It’s Gone*. I noticed that within his pieces of practical advice about financial goal-setting, he

seems to rely on the notion of intention as well as vision or belief: “Even though I’ve worked most of my life in nonprofit agencies, I have the strong conviction that I can and should make good money doing good things....I’ve earned more income each year for the past 20 years...” (p.90). Curious about what Miller considered to be “good money,” I obtained IRS 990 tax forms from Move the Mountain Leadership Center, Inc. for the years 1999-2012. I found that, in fact, Miller did earn more income each year, significantly more. In 1999, Miller’s salary and benefit package was \$70,362 (Move the Mountain Leadership Center, 1999). In 2008, it was \$157,286 (Move the Mountain Leadership Center, 2008). Thus, his salary more than doubled in ten years.

Miller’s salary seemed to be insulated from the impacts of the last recession<sup>9</sup>. In 2009, Miller’s compensation package was \$160,415 (Move the Mountain Leadership Center, 2009); in 2010, it was \$165,082 (Move the Mountain Leadership Center, 2010); and in 2011, it was \$177,067 (Move the Mountain Leadership Center, 2011). Interestingly, 2012 saw a significant drop in Miller’s compensation, with a total of \$146,198, and I’ll explore possible reasons for that drop in a later section.

While other CEOs of nonprofits might make six digit salaries, Miller’s situation lends itself to scrutiny because he claims that he is maintaining a simple lifestyle, and that in doing so, he is helping to end poverty:

Ending poverty will only come about when a critical number of us find our individual levels of having enough. Transformational leaders with anti-poverty goals will serve their communities well by connecting the important dots between the concept of having enough and the end result of reduced poverty. An over-indulgent lifestyle creates imbalances that hurt the individual, other people, and our planet. (2008, p. 58)

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<sup>9</sup> Because reporting criteria on IRS 990 forms changed in 2009, requiring the addition of “estimated amount of other compensation from the organization and related organizations” (Move the Mountain Leadership Center, 2009), I cannot accurately compare compensation for years after 2008 with the years prior.

One has to wonder what Miller considers to be “having enough,” particularly in light of the fact that Move the Mountain Leadership Center, Inc. purchased a BMW valued at more than \$52,000 in the year 2000 (Move the Mountain Leadership Center, 2000).

### **Advice for a New Age**

Miller’s YouTube video overview of class three of the new leaders’ training contains a blend of practical advice, such as financial goal setting with a specific dollar amount, with a sense of manifesting: “once you have that number in your mind, your unconscious part of your mind starts working for you...” (Miller,2014a, 3:28). He also reminds leaders that “money is energy” (0:53).

Miller discusses the process of deciding to significantly increase one’s income: “If one has a clear and compelling vision of a goal, it *can* be accomplished. Most of us, needless to say, would need help to develop the ‘emotional muscles’ necessary for believing that we deserve a 66% increase in income...” (p.90). Additionally, he stated in a radio interview (La Rue, 2012) that “100 out of 100 people don’t know exactly how much money they need to make to get out of poverty” (4:38). Consequently, there seems to be an underlying message that people are currently in poverty, in part, because they simply don’t know what they need and they aren’t believing strongly enough that they can get it. This notion is further explicated in Miller’s (2008) financial advice:

The key is to fix your mind on the goal of financial independence. When we can see ourselves in the best light, have ample support for taking a new step, and learn from relationships with people who earn more money, our lives can change for the better. (p. 95)

His reliance on faith is further evidenced in this passage dealing with charity:

There is something almost magical that happens to me when I give money away. It seems to me that giving money away keeps it in its proper perspective. Giving away money affirms my knowledge that there is more where that came from and



my faith that I will receive more in the future. Giving money away increases my sense of self-meaning. It is a paradox: The more I give, the more I receive. (Miller, 2008, p. 95)

This is a complicating twist to Payne's (2005) insistence that if people in poverty simply knew the middle-class rules, they could choose to become middle class. It includes the idea that you can manifest the desire of money and it will come to you. Based on this observation, I began to write memos about how *Circles* seemed to be relying on New Age thought.

### **Academic Treatment of New Age Thought**

At this point in the research process, I realized that I needed a scholarly conceptualization of the notion of "New Age thought." I examined academic materials, which, as discussed in chapter two, are considered data for grounded theory research methods (Birks & Mills, 2011).

Aldred (2002) suggests that New Age spirituality focuses on personal transformation and spiritual growth, yet because it embraces the notion that money is spiritual energy, it is ultimately a consumerist movement. Prashad (2000), in examining "New Age orientalism" (p.53), notes an insistence on living in the present, finding peace within oneself, and avoiding fear and anger, resulting in a situation in which, "the working class have no means to liberate themselves from the circumstances and conditions that chain them to the struggle for survival" (p. 60). Fernandez's (2008) analysis of New Age spirituality focuses on the theory of the "Law of Attraction," a concept which combines extreme positive thinking with the notion that reality can be manifested through one's beliefs. She examines the book *The Secret* (Byrne, 2006) along with the film of the same name (Heriot, 2006), both of which promote the Law of Attraction.

Fernandez (2008) notes that the Law of Attraction "supports consumerist values, entrepreneurship, and self-actualization while using socialist rhetoric to promote capitalist

values” (p. 1). When she examines the book *The Secret* (Byrne, 2006) in depth, Fernandez (2008) notes the marginalization of people in poverty:

...it is difficult not to think about how you are going to pay your rent, or grocery bills, or buy diapers. However, according to Byrne, you must block those thoughts from your consciousness, and tell yourself that you are not poor. She claims that when that happens money will come to you. (p. 42)

### **Endorsements for a New Age**

Returning to *Until It's Gone* to examine its rhetoric, I noticed that Miller (2008) used a metaphor of “Heaven on Earth” (p. 99), and that concepts often connected with the New Age thought appeared frequently within the pages of the book: forms of the word “transform” appeared forty-one times, and “inspire” appeared nineteen times within the book’s 145 pages. Noting that these terms are by no means exclusive to New Age thought, I cautiously proceeded with this memo and continued to grab more data.

I viewed a video on Move the Mountain’s YouTube channel in which a man I hadn’t yet encountered was reporting back on a group exercise he had just undergone, visualizing a world without poverty. The content of his debrief didn’t catch my attention as much as his accessories. There was something around his neck which reminded me of what we commonly referred to as “love beads” back in the ‘70s. His name, as indicated on the video, was Joe Vitale. Internet searches revealed that Vitale was in the film *The Secret* (Heriot, 2006), and is the author of several books, including one titled *Attract Money Now* (Vitale, 2007a). Also known as “Mr. Fire,” Vitale’s (2014) website insists that “you can learn his original methods for using the Law of Attraction in business and life” (para. 1). He recently used it to “attract” seven cars, and he promises that can teach us how to do the same.

Vitale’s blog (2007b) features his likeness, complete with love beads, standing in front of a sky full of pillowy clouds, with the sun’s beams majestically shining through. He urges the

reader to “click here for your free miracles coaching” (para. 1). We can also click onto the *Attract Money Now* webpage (Vitale, n.d.), where in a one-minute video, embellished by dollar bills falling from the sky, Vitale tells us of his seven-step formula which is “guaranteed” to guide us to wealth. We are urged to buy the book *Attract Money Now*; testimonials recount the way in which it changed lives. The website promises that the book will provide tips such as “one of the best-kept secrets of the wealthy for attracting money easily,” and “how to use the proven ‘tapping’ technique to keep cash flowing fast” (Vitale, n.d., para. 7). Here I will remind the reader that the Vitale endorsement of *Circles* was posted on Move the Mountain YouTube channel, indicating that the endorsement was, in fact, authorized by *Circles*.

Guided by grounded theory sensibilities, I resisted the temptation to draw any conclusions from one very curious endorsement. Instead, I began jotting down my thoughts in the form of memos, engaging in constant comparative analysis, and gathering more information. I generated data from *Circles* marketing materials. I viewed a YouTube video by Mindy Audlin, (2010a) called *End Poverty in America - Move the Mountain with Circles!* Standing in front of a sky full of pillowy clouds, Audlin encourages us to imagine “What if we were able to eliminate poverty?” Further internet research revealed that Audlin (2010b) is the author of *What if it All Goes Right?: Creating a New World of Peace, Prosperity and Possibility*, which includes a foreword by none other than Joe Vitale. Audlin (2010b) tells us that the “What if?” process arose from a workshop she co-facilitated with Vitale called “The Secret of Money.” In the pages of her book she assures us that we have the power to transform our reality should we decide to do so (Audlin, 2010b).

I created an emerging theory: “*Circles* has a New Age bent.” From there, I returned to *Until It’s Gone* (Miller, 2008), this time examining the cover for visual significance. I noticed that a sky full of pillowy clouds, a visual that was now beginning to look quite familiar, occupied the top third of the book. Below the clouds, the title was included mid-way down in a white stripe; and a red, somewhat broken gate occupied the bottom of the book. This layout of the book creates two perceptions for its potential reader: one, a sense of patriotism, a result of the choice of colors; and two, an impression of rising above poverty into a majestic sky. Below is the cover of *Until It’s Gone*.



**Figure 7: Cover of *Until It’s Gone***

The book’s endorsers include Diane Kennedy Pike and Arleen Lorraine, whom Miller (2008) considers to be “spiritual mentors” (p. ix). Pike and Lorraine are co-founders of the Teleos Institute, whose website states:

The purpose of Teleos Institute is to provide orientation, training, experiential practice, challenge, inspiration, education, companionship, and support for those who are consciously choosing the individualizing process; to facilitate the shift in identification from personality to Self; and to encourage integrated, balanced, and creative expression in those who are awakening. (Lorraine & Pike, 2014)

Describing one of her books, Lorraine tells us: “I received the *Love Principles*...on what I can only describe as a Ray of Light...when they came to me they were pure gift, the result of my inner classes on other levels of consciousness” (2014).

Miller co-founded Move the Mountain Leadership Center with someone by the name of Gary Stokes (Miller, 2008). Stokes is the author of *Poise: A Warrior's Guide* (2011), a book which acknowledges life’s challenges, but maintains that our reactions to them determine our full potential. It promises to teach us “how to let go of bad explanations that shrink our lives in order to develop good explanations that set us free to flow into every life opportunity” (back cover).

Miller himself has a long background in nonprofit work. The following passage from *Until It's Gone* (Miller, 2008) describes his background and education, infused with New Age sensibilities:

The divine logic of my circuitous path would eventually make itself known. Knowledge of the design features of architecture, the pragmatics of business structure and theories of organizational behavior would combine with the compassion I gained during my emotionally challenging, abrupt change in life’s direction to ultimately serve me well in the journey that lay ahead of me. (pp. 133-134)

Investigating *Circles*’ marketing further, I found a radio broadcast that had an undeniable New Age bent. Miller was pitching *Circles* on the Dr. Pat Show (Baccili, 2008), during which frequent commercials highlighted the wonders of astrological forecasting and a way to lose weight, not by dieting, but by envisioning a thinner you.

### **Meritocracy and Relentless Positive Thinking**

Similar to *Bridges* (Payne, et al., 2009) Miller (2008) asserts that people in poverty are hard-working and that his approach does not blame the victim. We have seen how the *Bridges* model contradicts this assertion. In practice, the way in which *Circles* is structured also indicates a discernable blame-the-victim, deficit orientation. As mentioned earlier, Lawless (2012) notes

that by focusing on individual families moving out of poverty, there is an inherent focus on meritocracy and individual responsibility: “this model reinforces the understanding that the individual is responsible for ending poverty” (p. 215). Freire has further insight on focusing on individuals rather than systemic problems:

They are treated as individual cases, as marginal persons who deviate from the general configuration of a “good, organized, and just” society. The oppressed are regarded as the pathology of the healthy society, which must therefore adjust these “incompetent” and “lazy” folk to its own patterns by changing their mentality. (p. 74)

The implication that relationships among those in poverty are pathological is highlighted in number ten of Payne’s (2005) key points: “To move from poverty to middle class or middle class to wealth, an individual must give up relationships for achievement” (p. 22). This point is affirmed by Miller (2014b) in his updated *Circles* leader training YouTube video, in which he discusses the differences between accomplices and allies. He suggests that perhaps we might not want to spend time with accomplices, though they may be our loved ones, until we get our goals accomplished.

Yet, what Payne and Miller are encouraging has the potential of destroying necessary support systems. It also undermines any potential for solidarity among those who are marginalized, reducing the potential for any community organizing or empowerment.

Lawless (2012) notes that *Circles* meetings incorporate rituals, such as “new and goods” and “appreciations,” which include an over-reliance on positive thinking. Meetings open with “new and goods” in which participants are asked to share something positive that happened in their life since the last meeting. Meetings end with “appreciations” in which participants are asked to share one thing they appreciate about the person sitting next to them. Miller claims that

there is too much focus on bad news in our society, and that “...if you create a culture of appreciation, major things can happen” (2013b).

Yet, the focus on positive thinking at the expense of critiquing social issues has been called into question by scholars. Gray (2011) reminds us that a relentless optimism is not always beneficial in working for social change as, “...it advances solutions variously situated in individual lifestyle changes, interpersonal relationships and social networks rather than in structure change” (p. 9). Woodstock (2007) comments on the prevalence of positive thought literature: “We see ample evidence today of a popular, quasi-religious belief in the ability of positive thought to solve not only individual problems but social ones” (p. 185). Journalist and author Barbara Ehrenreich describes the way in which positive thinking is often used to blame people for the faults of capitalism:

If optimism is the key to material success, and if you can achieve an optimistic outlook through the discipline of positive thinking, then there is no excuse for failure. The flip side of positivity is thus a harsh insistence on personal responsibility: if your business fails or your job is eliminated, it must be because you didn't try hard enough, didn't believe firmly enough in the inevitability of your success. (p. 8)

### **Recap of Thematic Concept Three: *Circles of a New Age***

**Data used.** In exploring this thematic concept, I utilized the following pieces of data:

- Autoethnographic notes and memos
- Academic material
- YouTube videos
- IRS 990 Tax returns
- *Circles* materials and books
- Websites

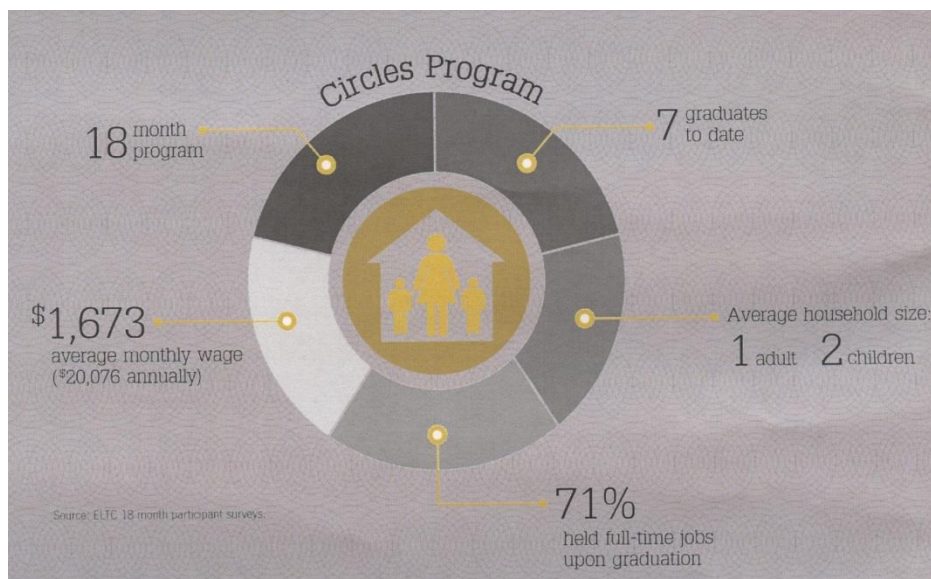
**Emerging theme.** At the point of theoretical saturation (Glaser & Strauss, 1967), the following theme emerged: There is a discernable New Age bent to *Circles*, coupled with relentless positive thinking and blended with the myth of meritocracy.

### **Conclusion**

The two-year pilot program for *Bridges* and *Circles* concluded at the end of 2013. The Bohemian Foundation's community report, included in its entirety as Appendix II, was available to the community as of February, 2014 (Bohemian Foundation, 2014). It primarily comprised testimonials, personal stories, graphics, and photographs. There are less than 1,550 words in the report's 12 pages. The *Bridges* section discusses the trainings, has basic demographic information about people in poverty, and has several photographs. Handwritten messages such as "It opens your eyes to stand in others' shoes!" grace the front and back cover. These were very likely the messages solicited at the advanced *Bridges* training in September of 2013. We were prompted to write down one thing that inspired or moved us about *Bridges* (V. Wendell, personal communication, September 26, 2013).

The *Circles* portion of the Bohemian report profiles one of the seven leaders who completed the 18-month commitment in Larimer County. With 15 leaders starting the program (S. Miller, personal communication, January 19, 2012), the cohort attrition rate was slightly lower than the 58% national average, which we discussed in the previous section. The following appeared on page two of the report, with no text explaining it:





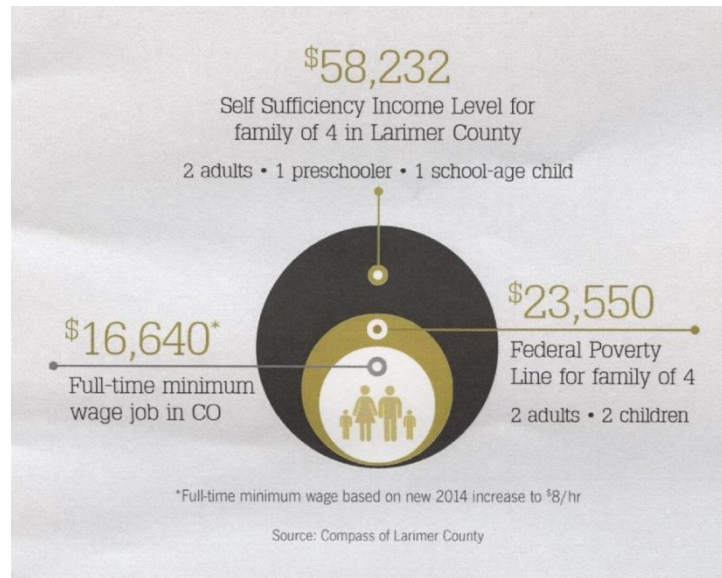
**Figure 8: *Circles* results from Bohemian report**

The statistics in the chart have no context and thus have no validity. For example, it tells us that of the seven graduates to date, 71% held full-time jobs upon graduation. That could mean that although some of the seven had full time jobs, some may not have had jobs at all. Moreover, it doesn't tell us how many held jobs before entering the program. Similarly, it tells us that the average monthly wage is \$1,673 or \$20,076 annually, but it doesn't tell us what that average wage was before the participants started the program.

Bohemian Foundation's IRS 990-PF tax forms for the years 2011 and 2012 shed further light on the resources that have been spent on *Circles*. In 2012, Bohemian Foundation granted ELTC \$121,000 for the "*Circles Initiative*" (Bohemian Foundation, 2012), while in 2011 they granted Move the Mountain \$50,000 for the designation of National Development Center (Bohemian Foundation, 2011). Contrasting these numbers with the average income of *Circles* leaders in the figure above—\$20,076 annually for seven leaders—this is not an effective use of the Foundation's money. This incongruity is magnified nationally, when we look at *Circles* claim that: "Since 2008, over \$25M has been committed to *Circles* across the country from

foundations, local, state, and national governmental agencies, and individuals and churches” (Circles New Mexico, n.d.-a, para. 7).

Information on a diagram further in the report (p. 5) seems to undermine any success that *Circles Larimer County* may have been attempting to claim:



**Figure 9: Income statistics from Bohemian report**

From this figure, we learn that a full-time minimum wage job in Colorado pays \$16,640, presumably per year. Thus, the average monthly wage for *Circles* Program graduates is only slightly above minimum wage. Moreover, although we are never told what is meant by a “self-sufficiency income level,” that amount for a family of four in Larimer County is \$58,232, with the federal poverty line of \$23,550. This makes it hard to celebrate the fact that seven *Circles* graduates, with an average household size of three, are earning an average annual income of \$20,076.

The report highlights a leader who completed the program and speaks highly of it. For those leaders who feel as though the program benefited them personally, I am in no position to

question their experience. But I can and do call into question *Circles'* very foundation and the claim to “end poverty in our nation in our lifetime.”

Returning to Charmaz’s (2008) statement cited in chapter two: “what and how questions build the foundation for moving into the why questions” (p. 408), we start by reviewing the what and how questions and emerging theories we have found thus far. First, we have shown how *Bridges* and *Circles* have an inadequate and perhaps even dangerous approach to what they consider the “intersections” of poverty with race, gender, and ability. Secondly, *Bridges* and *Circles* have no concrete foundation for proving efficacy. Third, *Circles* has a New Age bent coupled with relentless positive thinking and blended with the myth of meritocracy. We now revisit my research question: Given the sound academic critiques of the *Bridges out of Poverty* construct, and the lack of evidence that *Bridges* or *Circles* works, why has our community embraced them as methods of poverty alleviation?

In order to adequately answer that question, we will look more closely at the lifeline of *Circles* and *Bridges* in Larimer County, their funder: Bohemian Foundation.

### **Bohemian Foundation**

Bohemian Foundation is a Fort Collins-based philanthropic foundation. The following two paragraphs, which appear on their website, describe their intention:

Bohemian Foundation was founded in 2001 by Pat Stryker to continue her family tradition of making the world a better place. Our vision for the future is inspired by the legacy started by Pat’s family and we take inspiration for our name, *Bohemian* Foundation, from the bohemian movement in Paris in the early 1900s. The Bohemians believed there is something greater within each individual and that meeting one’s potential has worth and dignity. Like the Bohemians, we believe in imagination, creativity, innovation and spirit.

We look to our community to be receptive to the transformational effects of open-mindedness, to be willing to take risks and to be ready to learn. We are actively seeking creative ways of working in our community by involving our fellow citizens and organizations in working together, leaving the world a better place.

We believe we can make a difference in our world with our focus on community and music (Bohemian Foundation, 2012).

The Fort Collins community has benefited greatly from the presence of Stryker and Bohemian Foundation. Since its inception in 2001, Fort Collins area nonprofits have been the recipients of over \$12.5 million through the Pharos fund (Coloradoan staff, 2013a). Stryker donated \$3 million to a Colorado campaign that successfully defeated an English-only ballot measure (Medina, 2002), a significant victory for bilingual education. Responding to local disasters, Bohemian Foundation committed \$100,000 in 2012 to fire relief (Coloradoan staff, 2012) and \$750,000 in 2014 to flood relief (Kyle, 2014). Bohemian Foundation donates \$50,000 annually to the City of Fort Collins so that youth can ride buses for free. Bohemian sponsored music festivals such as Bohemian Nights in August (Coloradoan staff, 2013b) and the experimental “FoCoMX” in April (Fort Collins Musicians Association, 2014) add to the flavor of the City. Recent Poudre School District donations include \$375,000 for the “Little Kids Rock” program in 2012, which brought the experience of music to children who would not have had access to that creative outlet (Kyle, 2012); and \$25,000 in 2014 for after-school enrichment programs (Coloradoan staff, 2014). In 2003, Bohemian Foundation was a major donor for the Colorado State University Center for the Arts (Colorado State University Department of Public Relations, 2003). In 2011, Pat Stryker was awarded an honorary degree by Colorado State University in recognition of the over \$30 million she awarded to that institution (Hughes, 2011).

Stryker’s influence in Fort Collins is complicated by the fact that, in addition to her philanthropic interests, she also has multiple real estate investments in Fort Collins. She owns several properties in the prime Old Town area, near Colorado State University, and east of town near the interstate highway (Hughes, 2013). She also owns Oxbow, a 12 acre parcel adjacent to New Belgium Brewery and the Buckingham Neighborhood. Buckingham is an historic Latina/o

neighborhood with roots in the sugar beet industry (Thomas, 2003). In 2009, Stryker had plans to build a music venue on Oxbow, a venture that was met with neighborhood concerns of further gentrification, traffic, and noise (Aragon, 2009). The Center for Justice Peace and Environment (now the Fort Collins Community Action Network), the nonprofit for which I work, organized with the Buckingham Neighborhood to meet regularly with city planners and to ensure a sound test was conducted at the site of the proposed venue, so that the neighborhood would be aware of the extent of the noise that they would have to endure were the theater to be built. The sound test was carried out in July, 2009 (Woods, 2009); shortly afterwards, Stryker shelved the proposal citing the economic decline (Hughes, 2013).

Forbes notes that Stryker is the granddaughter of Homer Stryker and heir to Stryker Industries, which produces medical devices and software. As of September, 2013, she had a net worth of \$1.7 billion, ranking her the 327th richest person in the country (Forbes, 2014a) and 937<sup>th</sup> richest person on the planet (Forbes, 2014b). *Forbes* magazine highlights the fact that “Her Bohemian Foundation supports *antipoverty programs* [emphasis added] and the arts” (2014b).

### **Philanthropy and Accountability**

Earlier in this chapter I highlighted the November, 2011 launch of *Circles Larimer County* and *Bridges Out of Poverty Northern Colorado*. I noted that at the launch there were representatives from various local entities —the City of Fort Collins, Colorado State University, Poudre School District, Front Range Community College, and the Chamber of Commerce. All of these entities have either business interests in Bohemian, as is the case of the Chamber of Commerce, or they are recipients of significant amounts of Bohemian Foundation funds. It becomes extremely difficult for those entities to publicly call into question Bohemian Foundation’s activities, including anti-poverty initiatives such as *Bridges* and *Circles*.

Ahn (2007) urges social justice advocates to remember that foundations are established for their donor's benefit, a result of the tax incentives they are given. Ahn explains: "Foundations are made partly with dollars which, were it not for charitable deductions allowed by tax laws, would have become public funds to be allocated through the governmental process under the controlling power of the electorate as a whole" (p. 65). Rather than perceiving foundations such as Bohemian as being inherently generous, deserving of our unquestioning appreciation, they are entities that we should and must hold accountable. Moreover, if there is a perception that poverty alleviation is receiving adequate attention in our community, it will be all the more difficult to gain the financial and other resources to develop effective programs.

In chapter one I reviewed several critiques of Ruby Payne's antipoverty model. Of particular importance in this discussion is the critical discourse analysis of the Payne model, which examined why well-intentioned people bought into the model (Dworin & Bomer, 2008). The authors concluded that the language that Payne uses appeals to the White middle class and creates a situation for them in which they can think of themselves as helping the poor even though they are acting through the lens of the deficit.

It is my contention that because *Circles* and *Bridges* are marketed in such a way that they are appealing to a White, middle-class audience, who are never asked to question or change systemic causes of poverty, coupled with the fact that the initiatives are sponsored by a celebrated local philanthropist, our community has accepted them, at least for the duration of the two-year pilot, without adequate scrutiny.

## CHAPTER FIVE: DISCUSSION

### Introduction

As I type these final pages of my thesis, the National *Circles* Conference is taking place three miles away, here in Fort Collins. The temptation to attend was tempered by the \$350 registration fee, and moderated by the lack of information regarding details of the program or who might be speaking (Circles USA, n.d.-g). Confident that I had reached the point of theoretical saturation (Birks & Mills, 2011) in my data collection, I thought it more effective to begin to detail the results of my study and to formulate recommendations, rather than attend another *Circles* event.

This process began in 2008 when a nonprofit director handed me a copy of *A Framework for Understanding Poverty* (Payne, 2005); it developed into a deep sense of obligation to understand, investigate, and expose the forces which exist in a local poverty alleviation effort; and it has resulted in this thesis, which I am completing in 2014. I have conducted an in-depth study of *Circles* and *Bridges* as companion anti-poverty initiatives in Larimer County, Colorado. Thus far, I am convinced that I have shed some significant light on important aspects of these initiatives that had not yet been called into question. Yet, my work is only helpful if I can offer alternatives to what I have exposed as ineffective, inappropriate, and dangerous programs, which serve only to perpetuate an unjust and unhealthy system.

In this chapter, I begin by discussing limitations of the study. Next, I offer suggestions for ways in which the implementation *Bridges* and *Circles* might effectively be interrupted. Last, I suggest an organizing strategy in which healthy cross-class alliances might be built and significant change might be implemented.

## **Limitations**

Because this study focused only on Larimer County, it is limited in its ability to generalize to other communities. A unique dynamic exists in Larimer County with the presence of Bohemian Foundation as the primary funder of *Bridges* and *Circles*, a dynamic which does not present in other communities that implement these initiatives. Consequently, the same conclusions could not necessarily be applied to other communities in terms of *why Bridges* and *Circles* are embraced.

A further limitation includes the inability to interview Scott Miller directly. Although I did have considerable amount of data by way of videos; website material; reports; academic writings; and autoethnographic notes, interview data would have offered additional insight. I would have asked Miller, for example, about his income, specifically about how he reconciles making a six figure salary with his rhetoric about simplicity. I would also have asked him if his relationship with the Chamber of Commerce might influence *Circle* leaders' efforts towards workplace justice. What would happen, for example, if *Circle* leaders wanted to form a union or work towards a living wage? Further, I would have asked Miller about his relationship with aha! Process, and how and why he seems to be attempting to disassociate from it. Finally, I would want to know if the significant drop in his salary in the year 2012, might reflect a loss of support for *Circles* financially.

## **Reflections on the Future of *Bridges* and *Circles***

The *Circles Campaign* gained prominence by aligning itself with aha! Process, Inc. As we have seen, the aha! Process, Inc. model is problematic on multiple fronts; nevertheless, it provided an avenue by which *Circles* became popularized. This is particularly true for communities such as Larimer County, where *Circles* and *Bridges* were implemented as



companion initiatives. Collier (2014) and Lawless (2012) discuss the effort by *Circles* to disentangle itself from aha! Process and create its own training materials. This is underscored in the YouTube videos in which Miller actually changes his representation of a bridge out of poverty (Miller, 2011) to a road out of poverty (Miller, 2013). Distancing itself from Payne's extremely problematic but vastly popular construct will undoubtedly result in a significant loss of marketing power for *Circles*.

The lack of concrete evidence that *Circles* actually reduces poverty will become exposed as *Circles* continues. My contention is that *Circles*' prevalence will end up spiraling downward. There is one indication that may already be happening; although *Circles* claims it is growing, it has lost some sites. When accessed in April 16, 2012, the Circles Campaign website stated that there were "60 member communities in 23 states" (Circles Campaign, n.d.). When accessed on April 24, 2014, it was stated: "Today more than 1,000 community-based organizations in over 70 communities across 21 states and parts of Canada are working together to implement Circles" (Circles USA, n.d.-b). In comparing the maps on both of those websites, it appears that *Circles* lost its sites in Mississippi and Louisiana. According to a report published by the United States Census Bureau (Bishaw, 2013), in the year 2012, Mississippi was the poorest state in the nation, with 24.2% of its population living below poverty; and Louisiana was the third poorest state in the nation, with 19.9% of its population living below poverty. If *Circles* was effective in ending poverty, it stands to reason that they should be continuing to operate in those two states. The fact that Miller's income dropped in 2012 could be an indication that *Circles* is losing momentum. Regardless of what happens to *Circles*, the leaders who are currently involved in the program must be fully supported.

Whereas *Circles* may be experiencing a decline in popularity, *Bridges out of Poverty*, seems to be flourishing. Locally, community trainings continue. The construct is far reaching and insidious. Our community continues to embrace it uncritically, as social service agencies send staff to trainings. Colorado State University Housing and Dining utilizes it, and the City of Fort Collins has a certified *Bridges* trainer among its employees (Bohemian Foundation, 2014).

### **Implications for Social Work**

Social work, as a profession, has an obligation to critically address poverty alleviation initiatives in the context of broader social inequities. Social work pedagogy needs to equip social workers with the skills necessary to address the profession's core value of social justice. Freire's (1970) educational model should be embraced by social work programs. It is problem-posing, as opposed to "banking education," which serves only to reproduce the status quo. Freire called for a "praxis" that interweaves theory and action. He distinguished between "false generosity," which maintains an unjust system through individual acts of charity, and "true generosity," which works to dismantle oppressive systems. Freire's analysis of the oppressed and the oppressor includes conscientização or critical consciousness, which has the potential for leading both the oppressed and the oppressor to liberation.

Freire and Moch (1987) detailed the message that Freire gave when he spoke directly to social workers at the Social Workers World Conference in Stockholm, Sweden. Freire insisted that if certain qualities are nurtured in progressive social workers, there is limitless potential for positive social change. First, Freire stressed diligence in merging action with words, so that we act in ways consistent with our beliefs in order to "diminish the distance between what I say, what I affirm, and what I do" (p. 7). Secondly, Freire urged social workers to develop a permanent critical curiosity toward the world, ourselves, and those with whom we work. This

curiosity is “a restless search of knowing better that which is known and of learning that which is not yet known” (p. 7). It includes professional accountability: “Progressive social workers have to be responsible, have to be rigorous, have to work to establish as much as they can, scientifically, their own understanding of the phenomena of the society in which they work” (p. 8). Third, Freire reminds us that we must balance impatience with patience so that our actions are thoughtful, intentional, and meaningful. He reminds us that, “Society is transformed when we transform it” (p. 9).

The utilization of Freire’s pedagogical approach in social work is crucial in order to interrogate the ways in which neoliberalism undermines equity. The unprecedented concentration of wealth among an elite few, which pushes more and more to the margins of poverty; the privatization of schools and of our most basic resources; and the corporate consolidation of our media, all point to the need for both critical pedagogy and social action.

Intersectionality theory and critical race theory must be taught in schools of social work, so that social workers can begin to situate their own identities in their practice, starting with their own power and privilege (Mullaly, 2010). Critical social work, which calls into question oppressive structures and which works for social change (Allen, Briskman, & Pease, 2009; Fook, 2012; Hick, Fook, & Puzzuto, 2005), can no longer be marginalized within the profession, but it must become the standard by which all social workers perform.

Kivel (2004) suggests that one significant barrier to social change is actually the way in which our helping professions function. The helping professions have become a means of control, giving people a sense of hope, while simultaneously keeping them in a place of

oppression. The result is that “we have shifted our attention from the redistribution of wealth to the temporary provision of social services to keep people alive” (p. 115).

The professionalization of social work has come at the expense of social justice, as we have become a mechanism through which the ruling class of our country maintains its power (Dominelli, 2002; Fook, 2012; Margolin, 1997; Mullaly, 2010; Specht & Courtney, 1995; Wenocur & Reisch, 1989), and we must work to dismantle this paradigm. Macro and micro social work should not be treated as separate entities with competing goals (Gutiérrez, 1995), but must be integrated so that community action is directed by those who have been historically marginalized (Almeida, Vecchio, & Parker, 2008; Sachs & Newdom, 1999).

Social work pedagogy needs to fully integrate intersectionality, critical race theory, and Freirian thought throughout its content areas. Social workers have the capacity to work for equity and social justice, and they have the obligation to do so.

### **Local Actions**

As a community activist, I feel compelled to find ways in which this research can be useful on a local level, so that its result is not merely an academic exercise but rather a part of true praxis. As of 2012, the percentage of individuals living below the poverty level in Larimer County is 13.7% (United States Census Bureau, n.d.). This is not a figure we should be expected to endure; we cannot afford distractions by way of faulty initiatives that present an illusion that the situation is getting better.

We must call into question the structures that create and maintain inequity. If we do not situate discussions of poverty in the context of neoliberalism, the result is that we blame those in poverty for their own oppression. This is precisely what *Bridges* and *Circles* have done, but

because they craft language about not blaming-the-victim, people who are well-intended but who are not thinking critically are not able to see that relationship.

To reach the audience of local community groups and progressive faith-based organizations, who would benefit from an understanding of the material presented in this thesis, I will offer presentations on this research starting in the summer of 2014. From these trainings, I will form a core group of concerned community members who will articulate these concerns to the entities that are promoting this work, namely, the City of Fort Collins, Colorado State University (Housing and Dining), and Poudre School District. And, because the generosity of a local philanthropist should never undermine the self-determination of the most marginalized members of a community, I will meet with Bohemian Foundation representatives to discuss not only the problematic aspects of *Bridges* and *Circles* but ways in which the Foundation might support strategies for lasting social change. As outlined below, I will suggest the strategies of Baptist and Rehmann (2011).

Operating under the guise that we are working on issues of equity, social justice, and intersectionality while we are, in reality, promoting the status quo, is dangerous. We are allowing wealth and income gaps to widen, forcing more people into the margins, and refusing to acknowledge this reality because initiatives such as *Bridges* or *Circles* are clouding our vision.

### **Organizing Strategies**

As I wrote these final paragraphs, I realized that it was necessary to conclude this work by beginning to outline concrete action steps, in order to fold this project into praxis. This thesis was not merely about problematic anti-poverty initiatives, but about the conditions that allow a community and society to embrace them. Thus, root causes need to be examined and challenged, while simultaneously working authentically for social justice and equity.

One way in which Fort Collins and Larimer County could resist the implementation of faulty initiatives such as *Bridges* and *Circles*, is to invite and involve the theoretical understanding of Colorado State University, particularly the Department of Ethnic Studies, to engage in the process of evaluating programs. The Department of Ethnic Studies has a number of scholars who can provide a critique as well as in-depth analysis by using the lens of intersectionality as it relates to poverty and equity, and yet less than two miles from the department, decisions are being made regarding the implementation of poverty initiatives that are devoid of any in- depth analysis. Very simply, our community deserves better. In Fort Collins and Larimer County, we need to take full advantage of the theoretical knowledge that exists in our community so that we can work towards the elimination of poverty in an authentic way. We need to overcome the “gowns to towns” friction that exists too frequently in communities that house universities (Aggestam & Keenan, 2007) in order to weave thought and action resulting in a meaningful praxis (Freire, 1970).

In *Bridging the Class Divide*, Stout (1996), offers valuable suggestions for effective cross-class organizing. Stout, who grew up in extreme poverty in rural North Carolina, formed the Piedmont Peace Project, which serves as a model for working-class organizing. Stout offers suggestions such as: work on social change not social service; implement ongoing anti-oppression training in our organizations; and maintain flexibility to be able to adapt to a broad range of needs and leadership styles.

Additionally, in *The Pedagogy of the Poor*, Baptist and Rehmann (2011) present a compelling and insightful method of anti-poverty work. The book critically examines causes of poverty and presents different perspectives of poverty, based on conservatism, modernization, neoliberalism, and liberational paradigms. It interrogates capitalism, suggests root causes of

poverty, and moves toward action. It does so by dismantling the false dichotomy of activism and academia. Willie Baptist, a former homeless father, union organizer, organizer of the poor, Black Panther Party member; and Jan Rehmann, an academic and theologian, join together to present a method of anti-poverty work that merges theory with action, balances the organic intellectual with the traditional intellectual (Gramsci, 1971), and maintains optimism about the ability to overcome the existing oppressive structures. The Poverty Initiative, a New York-based organization in which Baptist serves as Scholar in Residence, states that its mission is “to raise up generations of grassroots religious and community leaders dedicated to building a social movement to end poverty, led by the poor” (Poverty Initiative, n.d., para.1).

Before I could consider this work complete, I thought it important to conduct one more interview. I spoke with Willie Baptist on May 12, 2014.

Baptist (personal communication, May 12, 2014) maintained that because our entire system is predicated on poverty, a far-reaching movement is necessary to create the social change required to eradicate poverty. He emphasized that corporations are based on profits that require cutting production costs and maintaining a low-wage pool of workers. He went on to say that current technical advancements are labor-replacing, rather than the labor-saving technical revolutions of yesteryear. This has far reaching implications in terms of “social dislocation, impoverishment and driving the so-called middle class into poverty.”

Because “hegemonic ideas are those paid for,” Baptist believes that the middle class has been taught—through the educational system, the media, and every system we encounter—that people are in poverty because of self-infliction. He further emphasized that those who used to have middle income are increasingly affected by the crisis, paving the way for united action with the poor and dispossessed.

Baptist underscored the concept that social movements are built in stages, and that the movement to end poverty is in its very first stage. Baptist asserted the importance of blending action with education: “In this initial stage, the powers-that-be have a vested interest in protecting the status quo—they can out-money us, and they can out-might us because they are in power. But we can understand what is possible today so we can out-maneuver them” (personal communication, May 24, 2014).

Allowing, if not embracing, ineffective and counterproductive poverty alleviation initiatives is the result of not thinking critically about them, of not researching their outcomes, and of not holding them accountable. Each of us has a certain degree of culpability; each of us can be part of the solution moving forward. What is required is expansive thinking that will take us beyond the silos of community and university, of service provider and social change organization, of us and them. We can and must join together to demand a community that is premised on equity and social justice; it is in our best interest to be critical of the existing structures, and we must do so beyond the implementation of the next program. Social justice activism must become, in the words of Paulo Freire (1970), an “ontological vocation” (p.74), as it is lifelong work.



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APPENDIX I: WORKING BRIDGES PROMOTIONAL FLIER



# BRIDGES *out of* POVERTY



Working together to create a genuine community of opportunity and responsibility.

## BRIDGES ONE-DAY TRAINING *for* BUSINESS

This one day training, sponsored by the Bohemian Foundation, is designed to give business and human resource professionals the tools and language to support their company's success in employing individuals from lower socioeconomic classes. The Bridges framework is being utilized nationwide by human resource and management personnel to impact employee engagement, productivity and absenteeism.

### GUEST PRESENTERS:

**Terie Dreussi-Smith, M.A. Ed.**

Co-Author: *Bridges Out of Poverty: Strategies for Professionals and Communities*

**Lisa Falcone**

Working Bridges Project Director for the United Way of Chittenden in Vermont

*Working Bridges is an employer collaboration that develops innovative practices to directly improve employee productivity, retention, advancement and financial stability.*

JULY 21, 2011

Bridges for Business:  
Strategies for Professionals and  
Communities

The Fort Collins Senior Center  
1200 Raintree Dr. Fort Collins, CO  
8:00 a.m. to 3:30 p.m.  
Breakfast & Lunch Provided

Please RSVP to: [www.bohemianfoundation.org/bridges](http://www.bohemianfoundation.org/bridges)

APPENDIX II: BOHEMIAN FOUNDATION REPORT TO THE COMMUNITY



BOHEMIAN FOUNDATION

# report to the community

circles lanmer county • bridges out of poverty northern colorado • workplace navigator pilot program



"I can't tell you how many times, in the last four months, I've had the opportunity to simply put into words that a wider, more compassionate view of a woman, a family, a situation is called for."

"It opens your eyes to stand in others' shoes!"

"Be aware and process, take a breath, listen - before reacting out of your own experience."

do you ever wonder...

**Do you ever wonder what it would take?**

To alleviate poverty? To feel its stabilizing effects throughout our neighborhoods, businesses, families and schools? To lend a helping hand more effectively? To empower more permanently? To create lasting change?

In November of 2011, our community started a journey to explore our basic assumptions about poverty and consider new strategies for affecting change. Through the Circles Larimer County initiative, Bridges out of Poverty trainings, Workplace Navigator pilot program, and regular convenings, we as a community have opened our eyes, rolled up our sleeves, failed some, succeeded more, and continually demonstrated resolve to see this through. It's tough work. It requires creativity, grit, and a willingness to stand up and speak out. Sounds like Northern Colorado to us, how about you?

Let us show you a  
**community**  
at work.



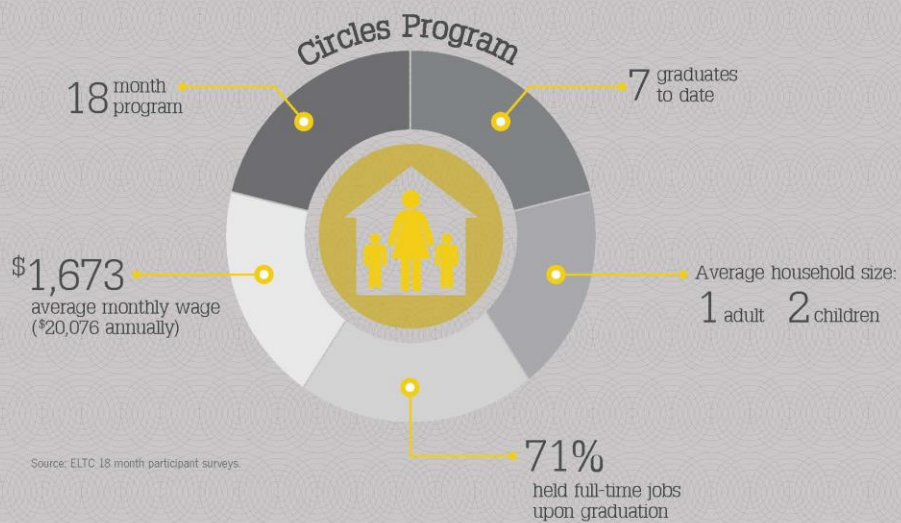
# circles larimer county initiative



### Relationships are the foundation of Circles.

The work doesn't stop there. Program participants are passionate about affecting change at all levels – adding their voices to debates and community conversations on program and policy reforms. You'll find participants testifying at city council meetings,

hosting community conversations, and speaking up as panel participants – it's all evidence of the confidence that comes from knowing you've got a circle of support behind you. It's an investment in people we're happy to make.



## antoinette glidewell

If you ask Antoinette Glidewell about her job at White Cheetah, be prepared for a smile. "I love computers, I get to be a part of new software development each day – I'm finally doing something I've always wanted to do."

Just two years ago, Glidewell was in a very different place. Striving to make a permanent climb out of poverty and needing a boost, she turned to a new initiative, Circles Larimer County, in search of support and a chance to share her story with others. Through Circles she received training, coaching, and most importantly, an Ally – the title Circles gives to community volunteers willing to walk side by side with an individual making the journey out of poverty and towards economic stability.

The life-changing support offered by Allies can take the simplest of forms – tutoring on writing skills or making pancakes on a Saturday morning. Tracy Mead, Executive Director of the Education and Life Training Center, which operates the Circles program, only wishes more community members would become involved. "Ally recruitment has been challenging," Mead says. "Forming meaningful relationships across socioeconomic lines is unfamiliar terrain for many people – it takes courage yet the payback is huge."

"I see it as an investment in myself," says Staci Shaffer, a current Circle Ally. "I'm learning about another side of life and I've found there are a lot more commonalities than differences."



3



## bridges out of poverty training

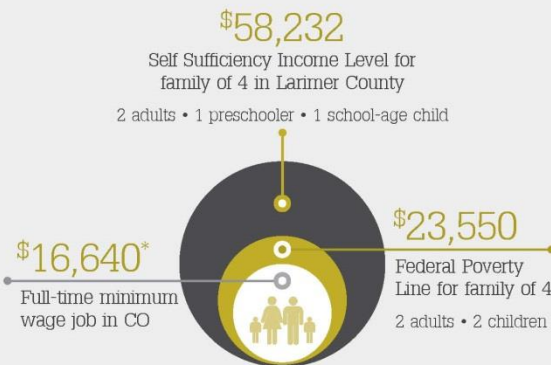
**A training for anyone willing to listen.** That's how one attendee described the Bridges out of Poverty training experience. From case workers to business managers, nonprofit directors to teachers, government to university employees, over 1,000 community members gave a full day or more of their time in 2012 and 2013 to gain a better understanding of poverty in our community, rethink common assumptions, and explore avenues for change. Bridges training starts with introspection – asking each of us to identify the paradigms and mental models that drive our daily decisions, thoughts, and actions. Were we raised in middle class households or in households experiencing generational poverty? Did we experience a world tailored to us given our race, class, gender or abilities, or were we continually adapting to environments we found hard to understand? Bridges training teaches us that these experiences matter, often informing the very assumptions that may interfere with our effectiveness as we seek to lend a helping hand. It's a reminder that sometimes the most impactful change begins with a good look inside.

**Our community didn't stop there.**

Inspired by the Bridges training, the City of Fort Collins formed an internal Bridges Steering Committee, while Colorado State University took a deeper look at the experiences of its Housing and Dining Services workforce, providing additional training and reviewing its workforce supports. The Health District of Northern Larimer County augmented its new employee orientation, and nonprofits, schools, churches, and businesses have embraced small and large changes - modifying a program or redesigning policy to become more effective. The work has just begun, but we couldn't be more pleased with where it's heading.

## jodi pfarr

travels the globe providing trainings to communities on poverty, diversity, and pathways to change. When she reflected on her experience in our community, we took note. "The enthusiasm and energy in these Northern Colorado trainings is some of the best in the nation," Jodi told us. "The willingness to engage with new information, improve individual actions and reflect on how institutions could be more effective is amazing. So now – I must encourage you to continue to strive as a community to come together, to utilize this information together, and to commit to creating change together."



\*Full-time minimum wage based on new 2014 increase to \$8/hr

Source: Compass of Larimer County

"Working at a non-profit here in town, we face tough issues every day. This training helped me to first realize my judgments and prejudices and then sparked me to re-analyze my actions. What a wonderful thing - everyone and every town should undergo a training like this!"

– Bridges training attendee, 2012



## workplace navigator pilot program

**Land a job, lose a job** – It's a frustrating pattern for many lower-wage workers across the country and not for lack of hard work or ability. Life throws curve balls – a car breaks down, a child becomes ill, a housing situation becomes unsafe. With limited financial means, these can feel impossible to manage, overwhelming an employee and resulting in retention, productivity, and career challenges.

In 2012, partnering with Columbine Health Systems and the Larimer County Workforce Center, we launched a Workplace Navigator program aimed at interrupting this cycle. Through one-on-one, confidential sessions, a Workplace Navigator addresses barriers to sustained employment by helping employees formulate problem-solving plans, negotiate difficult work-life situations, and connect quickly with appropriate internal and external resources. It's personalized support, provided on-site, and by a Navigator deeply familiar with community resources – it's an offering that takes the company's current Employee Assistance Program the extra mile. "With our EAP we were a good employer," says Joyce Shorthill, HR Director at Columbine. "Adding the Workplace Navigator has made us an employer of choice."

"I see employees who are knee-deep in issues – housing, transportation, financial, personal - who come in and just break down in tears," says Brittany Cole, Workplace Navigator at Columbine. "I think this program provides hope and that keeps people on the job. People tell me, I just can't believe this is something my employer does for me."

When people stay on the job, it has ripple effects throughout our community. We feel it in our neighborhoods, our schools, and in our businesses' bottom lines. "It costs us \$8,000 every time we have to replace an employee," says Bob Wilson, owner and CEO of Columbine. "From a business perspective and from a community perspective, the Workplace Navigator program is simply the right thing to do."

## when bob wilson

thinks about the personalized care his workforce provides to older adults each day, he admits to a certain fatherly pride. "It's important to me that our employees are supported in their jobs," says Wilson, owner and CEO of Columbine Health Systems. "We're a stronger company when we acknowledge employees' work/life challenges and support them."



Source: participant and managerial surveys conducted between 9/2012 and 6/2013

# a community, convening

**Convening, conversing, collaborating** – they're what community member Greg Ketchum calls the big "Cs" and in our opinion, you can't find more powerful forces for change. How often do we take time to learn from one another? How often do we seek to break down siloes or avoid duplication in our work? When a community sets out to tackle tough issues, convening is often an important first step.

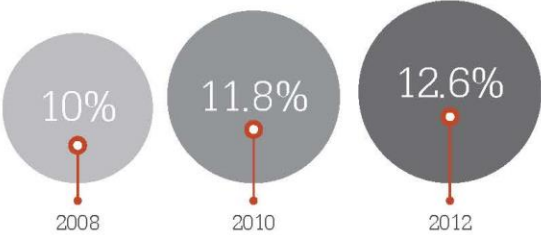
Through partnerships and collaborations, Bohemian Foundation has worked to ensure community conversation thrives. With the United Way of Larimer County as a partner, we brought together Navigator professionals representing healthcare, education, and business, for an exchange of knowledge and an opportunity to build stronger lines of communication across sectors.

By supporting the collaborative work of the The Women's Foundation of Colorado, WomenGive, and the City of Fort Collin's Women's Commission, we saw our community gather for an important panel discussion and film screening on the Cliff Effect, a pressing public policy issue affecting lower wage workers.

Through direct investment in community members, we have cultivated a group of volunteer trainers, all willing to give their time to facilitate conversations on the issue of poverty at the request of any community member, organization or nonprofit.

We are proud of these community conversations and continually impressed with the community members who drive them forward. This is, indeed, a community at work.

### Percentage of Larimer County Families\* Living in Poverty



\*Families are defined as one or more adults living with one or more children between the ages of 0-17.

Source: U.S. Census Bureau, 1 year American Community Survey estimates, 2008-2012





“The more you connect the dots with people, the sturdier our community fabric becomes. I’d like to see all of us work harder at connecting the dots, making this a better and better place – let’s build a legacy!”

– Heidi Phelps, City of Fort Collins employee and volunteer Bridges trainer



today, tomorrow, beyond

**It will take us –**

working together to drive progress, working together to ignite change. The complexity of poverty requires solutions built from diverse voices, diverse viewpoints and diverse expertise. Over the past two years we have been inspired by your voices.

The voices of business, of government, of tireless social service workers, educators, and community members, but most importantly, the voices of those whose lives are impacted by poverty. Their stories and their aspirations are at the heart of this work.

This is tough work and we have more to learn and much more to do. And we must. Because we can do better. Because poverty alleviation is within our community's reach. Because, when we see this through, opportunities can overshadow barriers for all of our citizens.

Let's ask ourselves,  
what can we  
do next?

give GATHER read  
 coworkers or friends together to cook a meal for the Circles Larimer County weekly meeting. *Nickel and Dimed.*  
 join Encourage  
 our mailing list for updates on this initiative at [bridgesnocolorado.org](http://bridgesnocolorado.org). coworkers and friends to attend a Bridges out of Poverty training.  
**COMMIT** to taking action **TODAY.**  
 speak up explore  
 offering the Workplace Navigator program to your employees. Learn more at [worklifecolorado.org](http://worklifecolorado.org).  
 Engage SUPPORT  
 as a business leader by attending a Chamber event on Workplace Navigator strategies. a person climbing out of poverty by becoming an Ally with Circles Larimer County.  
 Challenge learn  
 your faith community to join this effort. about a new School Based Navigator initiative in Fort Collins. Visit [thematthewshouse.org/program](http://thematthewshouse.org/program).

## what would you like to know?

- participate in a training and join our mailing list: [bridgesnoco.org](http://bridgesnoco.org)
- explore the Workplace Navigator program: [worklifecolorado.org](http://worklifecolorado.org)
- volunteer with the Circles program: [eltcenter.org/circles-larimer-county](http://eltcenter.org/circles-larimer-county)
- investigate policy-related issues: [clasp.org](http://clasp.org)
- attend a Chamber event on Workplace Navigator strategies: [fortcollinschamber.com](http://fortcollinschamber.com)
- watch a movie: *Losing Ground: The Cliff Effect*: [inews.rmpbs.org/cliffeffect](http://inews.rmpbs.org/cliffeffect)
- read about a new School Based Navigator program: [thematthewshouse.org/program](http://thematthewshouse.org/program)
- learn about workforce development initiatives in our county: [larimerworkforce.org](http://larimerworkforce.org)
- request a local Bridges trainer for your business, nonprofit, or small group: [bridgesnoco.org](http://bridgesnoco.org)

### About Bohemian Foundation

Based in Fort Collins, Colorado, Bohemian Foundation seeks to involve our fellow citizens in the care and improvement of our community. A private family foundation established in 2001, we are proud to have brought these nationally recognized poverty alleviation speakers and models to Larimer County. We are committed to educate and inspire our community into action, and to the power of collaboration and partnerships to create lasting change. Thank you, Larimer County, for coming together and rethinking business as usual when it comes to addressing poverty.

For upcoming training dates or to learn more about our work, please visit Bridges Out of Poverty at [bohemianfoundation.org](http://bohemianfoundation.org)

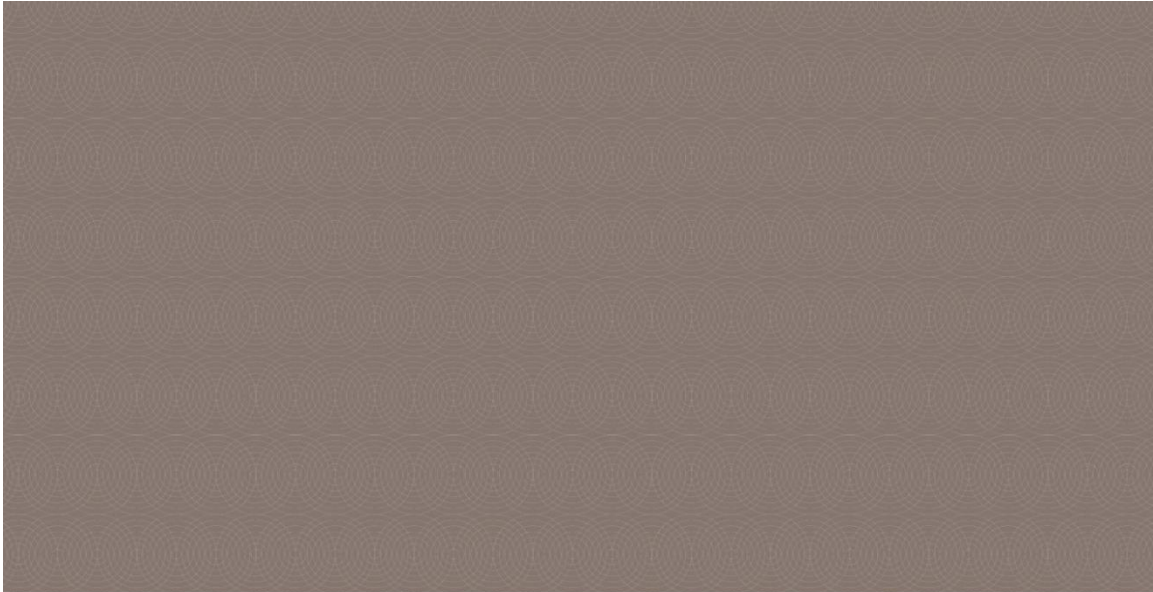




"I now see my role clearer.  
I have re-learned how to  
affect change—I am inspired."

"The Bridges training was such a  
jaw dropping revelation into the  
complexity of life in poverty."

"This has dramatically changed  
my interactions with my students  
and their families. This has resulted  
in a more solid retention, graduation,  
& placement rate at my college."



262 E. Mountain Avenue • Fort Collins, CO 80524 • 970.221.2636 • [www.bohemianfoundation.org](http://www.bohemianfoundation.org)



Released January 2014

### APPENDIX III: INTERVIEW QUESTIONS

## **Interview Questions for Those with Economic Expertise Or Expertise in Public Opinion**

Thank you for agreeing to participate in my research. Are you okay with my audio taping this interview? I want to make sure I capture your responses correctly. After I transcribe our interview, I will email you the text, so that you can add to it if you would like.

1. The Bridges out of Poverty construct has been soundly critiqued by academics. Are you familiar with these critiques?

*Probes:*

- a. If not, I will share my understanding of critiques.
  - b. If yes, what are your thoughts on these critiques? And in your opinion, do you think that the Circles Campaign can move beyond these critiques? If so, how?
  - c. Is it possible that the Bridges out of Poverty lens perpetuates stereotypes and/or victim blaming?
2. What is your perspective on the Bridges out of Poverty (the “Bridges Construct”) lens? Do you believe it to be the most appropriate lens for Allies as they enter their work with Circles Leaders? Why or why not?
  3. The July 2011 Rensselaer Polytechnic Institute study indicated that there is 10% tipping point for the spread of ideas. What are your perspectives on how this may apply to poverty alleviation?  
*Probes:*
    - a. If a community were to reduce poverty by 10%, would it follow that the community would then be committed enough to eliminate poverty?
  4. Would you be willing to share your thoughts on the latest data and what it says about the effectiveness of the Circles Campaign?
  5. It seems to me that the Circles Campaign is largely based on the analysis of the economic factors from Mark Lautman’s book, *When the Boomers Bail*. What are your thoughts on this analysis?
  6. From your perspective, what are your thoughts on how the Circles Campaign can end poverty in our nation in our lifetime?
  7. Do you think it’s possible to end poverty in our nation in our lifetime?
  8. Is there any other information that you’d like to share with me about the Circles Campaign or the Bridges out of Poverty construct?
  9. Are there any other people that you think I should talk to?

## **Interview Questions for Those Actively Working in Other Anti-Poverty Programs Or Who are Otherwise Concerned about Poverty Alleviation**

Thank you for agreeing to participate in my research. Are you okay with my audio taping this interview? I want to make sure I capture your responses correctly. After I transcribe our interview, I will email you the text, so that you can add to it if you would like.

1. The Bridges out of Poverty construct has been soundly critiqued by academics. Are you familiar with these critiques?  
*Probes:*
  - a. If not, I will share my understanding of critiques
  - b. If yes, what are your thoughts on these critiques? And in your opinion, do you think that the Circles Campaign can move beyond these critiques? If so, how?
  - c. Is it possible that the Bridges out of Poverty Lens perpetuates stereotypes and/or victim blaming?
2. What is your perspective on the Bridges out of Poverty (the “Bridges Construct”) lens? Do you believe it to be the most appropriate lens for Allies as they enter their work with Circles Leaders? Why or why not?
3. The July 2011 Rensselaer Polytechnic Institute study indicated that there is 10% tipping point for the spread of ideas. What are your perspectives on how this may apply to poverty alleviation?  
*Probes:*
  - a. If a community were to reduce poverty by 10%, would it follow that the community would then be committed enough to eliminate poverty?
4. Would you be willing to share your thoughts on the latest data and what it says about the effectiveness of the Circles Campaign?
5. It seems to me that many of the concepts in the Circles Campaign are based on the analysis of the economic factors from Mark Lautman’s book, *When the Boomers Bail*. What are your thoughts on this analysis?
6. From your perspective, what are your thoughts on how the Circles Campaign can end poverty in our nation in our lifetime?
7. Is there any other information that you’d like to share with me about the Circles Campaign or the Bridges out of Poverty construct?
8. Are there any other people that you think I should talk to?