

A FRAME OF REFERENCE FOR TESTING

THE SOCIAL INVESTIGATOR¹

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The problem of investigating a social situation has two fundamental aspects, the first of which is the question of how to achieve a close and accurate approach to the social process to be investigated so that the truly real and valid facts are harvested and not, perhaps, illusionary and unreliable ones. Sociometry in communities and the psychodrama in experimental situations make a deliberate attempt to bring the subjects into an experimental state which will make them sensitive to the realization of their own experiences and action-patterns. In this "spontaneity state" they are able to contribute revealing material concerning the web of social networks in which they move and the life-situations through which they pass. This conditioning of the subjects for a more total knowledge of the social situation in which they are is accomplished by means of processes of warming-up and by learning to summon the degree of spontaneity necessary for a given situation.

In the social sciences, the subjects must be approached in the midst of an actual life-situation and not before or after it. They must be truly themselves, in the fullest sense of the word. They must be measured in a real and natural situation; otherwise we may find ourselves measuring something totally different from the situation we set out to measure. If we have not a clear picture of the problem, it may result in

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- i. This study carries on the discussion of testing which was begun with some material on spontaneity tests in "Application of the Group Method to Classification" (1932), on the analysis of the social investigator in "Who Shall Survive?" (1934, on the participant observer vs. the auxiliary ego in "Sociometry in Relation to Other Social Sciences," SOCIOMETRY (1937), on the standard situation in "Psychodramatic Treatment of Marriage Problems" in SOCIOMETRY (1940)--all by the author of this study; and on standard situations in "The Place of the Psychodrama in Research" in SOCIOMETRY (1940) by J. G. Franz.

our measuring the subjects at a time when they are half in and half out of the situation, before they begin to act in it or long after they have lived through it and the situation has grown "cold"--a social conserve. It is evident that the situation to be measured must be caught in statu nascendi and the subjects warmed up to it. This emphasizes the enormous importance of the concept of the Moment for all conceptual thinking relevant to the preparation of truly genuine experiments in human societies.

This need for investigating a relationship or a social situation in a manner which adequately portrays every phase in its development (an early phase, a later phase and an end-phase) is crucial in every field within sociology. Sociometry has made this end its particular objective. Sociometric techniques which are known today are probably but a small part of the tools which a future sociometry will make use of, and they are by no means to be confused with sociometry as a general theory in the social sciences.

The other fundamental aspect of the problem concerns the investigator, himself. In the social sciences, the problem of the investigator and the situation in which the experiment or study is to be carried out have been of the gravest concern. However, the methods for dealing with this fundamental difficulty have been most unsatisfactory, to date. Let us consider two of the most advanced of these approaches: the method of the participant observer and the method of the psychoanalyst.

The participant observer, in the course of his exploration, enters into contact with various individuals and situations, but he, himself--with his biases and prejudices, his personality equation and his own position in the group--remains unexamined and therefore, himself, an unmeasured quantity. The displacement in the situation to be investigated which is partly produced by his own social pattern does not appear as an integral part of the findings. Indeed, we have to take the inviolability of his own judgments and opinions for granted and the "uninvestigated investigator" constitutes, so to speak, an ever-present error. This is, of course, only true for social studies in which the investigators are, as individuals, essential parts of the investigation. It is different in social studies which investigate finished products--processes which have become stereotyped and stationary, lending themselves to actuarial study and the development of scales. Social measurements of such processes are, of course, a part of sociometry in its broader sense, but they have a limited practical meaning without the frontal approach--the direct measurement of interpersonal phenomena.

The psychoanalytic investigator is also an unknown

quantity in the situation in which he operates as an analyst. Any educational psychoanalysis which he may have undergone at an earlier date does not alter the fact that he is not measured during the process of interviewing and analyzing any individual. Indeed, in order to accomplish the evaluation of both analyst and patient, a third person--a super-analyst--who is in equal relationship to both, would have to be present during the treatment-situation--and yet aloof from it. The direction of his treatment and his interpretation of the material gathered is totally subjective. At the time there is no frame of reference in the situation except his own opinion, which can provide a basis for determining whether the material has been secured in the proper fashion or whether the significance he assigns to it is scientifically valid.

In order to overcome the grave errors which may arise in and from the investigator himself, we resort to a sociometric approach which is especially adapted to the microscopic study of individual phenomena. The participant observer--in one particular form of this work--does not remain "objective" or at a distance from the persons to be studied; he becomes their friend. He identifies himself with their own situations; he becomes an extension of their own egos. In other words, the "objective" participant becomes a "subjective" one. As a subjective participant he can enter successively or simultaneously into the lives of several individuals, and then function as a medium of equilibration between them. This is the first step.

If we consider the investigator who gives out questionnaires as being in a situation of maximum formal objectivity, then the investigator who identifies himself successively with every individual participating in the situation approaches a maximum of subjectivity. A professional worker acting in this fashion produces excellent therapeutic effects, but the method does not improve upon the intended objectification of the investigator, himself.

A step beyond this is the psychodramatic method, a situation which provides an experimental and a therapeutic setting simultaneously. Here, the director of the theatre is present, but outside the exploratory situation, itself. The investigators to be tested are placed in life-situations and rôles which may occur in the community or in their own private lives until their ranges of rôles and their patterns of behavior in these life-situations has been adequately gauged. This procedure is carried on until every one of the investigators is thoroughly objectified. Re-tests are made from time to time in order to keep pace with any changes which may have taken place in their various behavior-patterns.

In the course of such work, the range of rôles and the range of expansiveness of each investigator become clearly

defined and the stimulus which he may be to the subjects of his investigations has become a known quantity. Thus, the psychodramatic procedure provides a yardstick by which we can measure and evaluate an indefinitely large number of subjects in specific life-situations and in specific rôles. The paradox is that the investigator, although he has become objectified by this process--a "controlled participant observer," so to speak--still continues to be what he originally started out to be: a subjective participant.

The process of objectifying the investigator takes many forms in accord with the situation which he is to explore and it has, also, many degrees of perfection. An ideal situation of this kind is obtained with a psychodramatic group in the experimental setting of the therapeutic theatre. For the members of a psychodramatic group, a range of spontaneity is permitted in rôles and situations which far surpasses that of any actual community and yet may include all the rôles and situations which exist there. At the same time, the behavior of every member of the community--however spontaneous it may be--is recorded in addition to the interaction between the members of the group both on the stage and off it. Thus, the ideal background is constructed for the task assigned to testers within the psychodramatic group, itself.

Here follows an illustration of how investigators are put through one of a series of tests, the combined results of which will enable us to know for what types of rôles and situations in the psychodramatic group they are suited or unsuited. Naturally, the investigators are treated as subjects in need of testing. They will not be "released" as investigators until they have passed through the entire course of tests.

Testing in Typical Life-Situations

Preparation of the Tester. The tester chosen is carefully prepared for the tests. He knows well in advance the type of typical life-situations in which he is to function and he also knows the kind of rôles he is to play--for instance, that of a father, a judge, a policeman, a husband, etc.--for he, too, has been tested and his range of rôles determined: it has already been proved that he is adequate in any one of these rôles. He is coached in the particular rôle he will assume in this test in order that he may present to every subject--as far as possible--the same psychodramatic stimulus. It is important that he give a stereotyped performance--stereotyped in length of time, range of ideas and dialogue and in the presentation of the crucial dramatic motif with which he is to take the subject by surprise.

However well-coached a tester may be, there are two factors in his performance which are significant. The first factor is strictly stereotyped and rigid, and neither the tester nor the subject is allowed to change it during the course of the action. This factor consists of the rôles of both tester and subject, the type of life-situation, the dramatic motif and the duration of the preparatory phase in which the subject is warmed up to this motif. The tester is forced by this factor to keep an open mind toward the spontaneous reactions of the subject to the situation and the motif. In other words, the tester must himself remain spontaneous and flexible, ready to move with the subject along the lines of his response and at all costs avoiding rigidity, for it is to be a test of the readiness--the "spontaneity"--of the subject and not of his ability to resist suggestions coming from the tester.

From the moment of the disclosure of the leading dramatic motif there are many possible courses of action open to the subject, and the end or solution depends entirely upon the ingenuity and spontaneous desires of the subject. These the tester must be prepared to meet.

The degree of flexibility which the tester must display does not alter the fact that he must be prepared and coached for as many as possible of the courses of action which the subject may elect to follow. Only after he has become acquainted with every one of these will he be able to offer to all subjects--however different their responses and reactions may be--an equal stimulus. The content of his questions and answers may differ from one case to another, but the weight of the stimulus should be the same, always. It is natural, when the tester has been coached for all the many possible courses of action of the subject in any particular situation, that his attitude will depend only upon his own experience and that of the director, and that he will be limited by these experiences. But he will become more experienced and more versatile as he goes on experimenting with the various subjects.

In this particular illustration, the subjects are all women. A typical, yet crucial, life-situation is therefore chosen which calls for women as subjects. (There are other typical life-situations in which the subjects are all men, and still others in which the sex of the subject makes no difference.) The situation is this: a husband (represented by the tester) comes home to his wife (the subject) and tells her that he is in love with another woman and wants a divorce. We may consider, at the outset, a number of possible reactions on the part of the subjects for which the tester should be prepared.

The subject may, for instance, react to the situation in one of the following ways:

(A) she may take it with a smile and agree that the husband's life is his own and that his choice is therefore his own, as well, or

(B) she may accept the situation unconditionally, as a matter of principle, or

(C) she may accept it and say that she, herself, is in love with another man and has, for some time, wanted a divorce, too, or

(D) she may accept on condition that her husband continue to support her, or

(E) she may accept with the reservation that she have an opportunity to see the other woman and talk to her, or

(F) while accepting, she may beg her husband to give her time to adjust herself to the situation, or

(G) although she accepts his decision, she may tell the husband that she will always love him and will be faithful to him as long as she lives, or

(H) accept, and offer to help him financially to make his position secure enough to marry the other woman, or

(I) she may demand the exclusive custody of the children, or

(J) she may make the condition that she keep their home for her own, or

(K) make the condition that she be made the beneficiary of his insurance, or

(L) accept, but commit suicide immediately afterwards.

On the other hand, she may refuse to accept the situation on one of the following grounds:

(1) she is about to have a child, or

(2) she loves him and he can only be taken from her by force, or

(3) she has nowhere to turn and no money; she is helpless without him, or

(4) life with him has brought on an illness for which he is to blame, or

(5) she will fight this other woman for the possession of her man.

She may threaten direct action, such as killing him or the other woman, or she may beg for another chance to regain his love.

Still another reaction may be that she refuses to believe that the situation is true--refuses to take her husband's declaration seriously.

These are only a few of the possible solutions which may emerge in the course of testing a number of subjects in this sample situation. Naturally, it is impossible to anticipate every possible reaction, and as a consequence, many solutions will be presented for which the tester must use his own initiative. These variations, however, constitute a part of the mass of the reactions which will be encountered in this life-situation, and as such form part of the recorded total of behavior-patterns.

Instructions for the Subjects. The subjects are admitted separately to the scene of the test. Each, of course, does not know what has taken place with her predecessors. When a subject is admitted, the director tells her briefly that the tester will portray her husband in the situation to follow and that she is to act with him and react to him just as if he really were her husband. The time and the place of the scene (perhaps in the evening, just before dinner) are stated and the scene can begin.

The instructions should be identical with every subject, and it is important that she should be taken unaware by the dramatic motif of the situation. From the moment when this is disclosed, the leading part in the action is left to the subject, with the tester suiting his actions and responses to her. He does everything he can to promote the most spontaneous possible reaction in the subject, in order that the full extent of the subject's reactions can be recorded.

Instructions for the Recorders. There should be two recorders. Both of them should time the duration of each subject's period on the stage, in order to provide a mutual check. In addition, one recorder should take careful notes of every word spoken, while the other should note every gesture and motion on the part of the subject, with the times of each. This should provide an accurate record of the following:

(1) the duration of the instruction to the subject, for although the instruction is standardized, individual peculiarities of the different subjects may cause repetitions, fuller explanations, etc.,

(2) the duration of the "starting interval" which is the length of the interval from the end of the instructions to the actual inception of the subject's action or assumption of the character he or she is required to assume in the situation,

(3) the duration of that standardized portion of the test which begins at the end of the starting interval and continues until the moment when the dramatic motif is disclosed to the subject, and

(4) the duration from the moment of the disclosure to the end of the action.

The duration of the pauses between the verbalized bits of action are not necessarily measured individually as such, but they can be estimated as the total time spent in pauses. A comparison between this total time and the total time spent in speech is often very illuminating.

In this way we can get a record of the approximate total number of words spoken by the subject during the test, the total number of speeches, the number of gestures, the range of motion about the stage, as well as the durations mentioned above. All these records may be compared from subject to subject, and the deviations from the "norm" noted.

It is important that these typical situations are actually acted out, like bits of real life. Take, for example, another sample situation which has found to be productive: the subject is informed by his family physician that his father has just been killed while crossing the street. The tester, in the rôle of the physician, does not walk up to the subject and simply ask him the question: "How would you act if you were to hear suddenly that your father had been killed in a street accident?" and then await an answer to this question. This procedure would only reduce the test to a questionnaire level. The subject and the tester must actually function in the rôles of son (or daughter) and family physician, and give full value to the dramatic situation. It is a direct and frontal approach, just as it might occur in life, itself. The tester develops the point step by step and does not burst out with the news of the father's death any more than he would in real life. The portrayal must depict a real-life situation but, in addition, this must be a situation in which this particular subject could, conceivably be. It is not a generalized behavior-pattern of the subject, but a situation colored by his personality and feelings. By means of this test we obtain a glimpse into the son-father relationship in a situation crucial for the subject and into his attitude towards the fact of death. The subject, stirred up by the action-patterns, is particularly ready for a quick, dramatic interview after the test.

In another typical situation which has been used for tests of this sort is that in which the subject is driving his car beyond the speed-limit and is stopped by a State Trooper. It is interesting to see how the relationship to law and

authority varies from subject to subject. From meekness and subordination the range will be seen to run all the way to aggressiveness and, even, actual assault and from open recognition of the delinquency to cheating, lying and, finally, attempts at bribery.

Another situation shows the subject as he is called in to the office of his employer; here he is told that his record has been unsatisfactory and that he is dismissed. This test is varied to fit each subject's actual life-situation as closely as possible. Here again the variety of reactions is interesting. Some subjects will accept the dismissal silently and leave the stage at once, while others ask as to the cause of the dismissal and, in some cases, begin a long argument which may call for action on the part of the director before the scene can be brought to an end.

There is still another typical situation in which the tester appears as a parent with a gift of money for the son or daughter. This sum has been saved secretly as a surprise. The subjects are told to react to this situation in as personal a manner as possible. Some react negatively with the remark: "This could not happen in my family"; some accept the money readily; some reject it violently, insisting that the parents make use of it, and we see a number who have no idea what to do with the money, while others have a clear, precise plan.

These few sample situations, together with the illustration given earlier, may serve to show the pattern which should be followed, in a general way, in constructing typical situations for testing. There are certain specifications which must be met in every one of them: it must be a situation which could happen to any one of the subjects; it must be as simple as possible and yet present the subject with some sudden crisis which will necessitate some spontaneous reaction from him immediately, and the more fundamental the crisis is, the more illuminating will be the reaction.

There are some definite advantages to be gained from placing this procedure in the psychodramatic setting. For one thing, an indefinitely large number of typical situations can be constructed and put into use with a view to determining their value under all circumstances. Those to which the largest number of subjects react are retained and the others put aside. In this fashion, the situations, together with their rôles, undergo a continuous process of testing and objectification. By this constant trial and error we can obtain a frame of reference for all possible situations and rôles for normal and abnormal individuals alike, against which the life-situations and rôles of the actual, open community can be tested and measured. The psychodramatic group permits a total control,

in the sense of simultaneity, of all individuals who appear on the stage, and a permanent record of their behavior and their interactions is made possible. The behavior-patterns of the testers can be continuously checked and re-checked in the records and their variations, if any, evaluated. The staff of testers is permanent and against them, as a standard, any number of individuals can be compared as time goes on and every variety of individual, differing as to race, culture, age and sex can be measured. Spontaneity scales can be constructed--on the one hand to determine the spontaneity-quotient of the subjects tested and on the other hand with a view to comparing the communities from which they come. Our studies to date indicate that spontaneity scales can be constructed which have a great deal of precision, showing the degree with which an individual deviates from the relative norm. Due to the fact that the subjects are taken by surprise when the dramatic motif of each test is disclosed to them, their readiness to act in an emergency--their spontaneity--is called upon and its sufficiency to the emergency can be measured and compared to that of other subjects. A comparison between the typical rôles in the communities in which the subjects live and the adequacy with which the subjects can fill these rôles on the stage can indicate the degree to which the subjects are an integral part of their culture.

When the investigator has been tested in this manner, we are able to use him as a tool for testing any group of subjects in typical situations, as described above. In addition to this, he can be used for the treatment of subjects in his new qualification as a subjective participant who is objectified to a point where he can be considered a known quantity in the procedure. He has become an auxiliary ego whose behavior in the process of guidance on the psychodramatic stage is within some degree of control. The treatment is thus freed from the biases and emotionalisms of the therapist. An essential advance upon the psychoanalyst as an investigator as well as a therapist is thus presented by this method. It is obvious that teachers, social workers, nurses and others in their respective treatment-situations can profit greatly from preparatory training of this sort.

Finally, this method can be used to advantage as an improvement upon the participant-observer technique of investigation. As a result of careful gauging of the personalities of the investigators who are to be employed as sociometrists or observers in the community at large, a frame of reference is established at the research center to which the investigators return with their data and findings. The use of this frame of reference provides a more objective basis than has heretofore

existed for evaluating the reflection of the investigators' own behavior-characteristics upon their findings in the community. The social investigation of any community, when based upon sociometric principles, is equipped with two complementary frames of reference. The one is the objectified investigator so prepared and evaluated that his own personality is no longer an unknown factor in the findings. The other frame of reference consists of the members of the community who are brought to a high degree of spontaneous participation in the investigation by means of sociometric tests, and therefore contribute genuine and reliable data. Thus, the social structures which actually exist in the community at the moment of investigation are brought to our knowledge with a minimum of error on the part of both the investigators and the investigated.

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