March 2, 2012

Dear colleagues at the Politics of Protest workshop,

I really appreciate the opportunity to share my work with you.

This paper focuses on questions based in conversations, work and study over the last 10 years with the Poverty Initiative, a network of poor peoples' organizations committed to building a movement to end poverty. It's also based on questions I've developed through my work with organizers in Mexico, Chile and the Dominican Republic. It builds on my dissertation research, about political education among Zapatista organizations in Chiapas, Mexico. With this paper, I've tried to "zoom out" and look at some of the broader history, traditions and practices that shape social movements' political education. One lesson I'm learning is that we have to "organize smart."

In terms of audience, I'd like to develop this paper to serve as an invitation to other organic intellectuals, scholar-activists, scholars who are engaged in movement-centered scholarship, or those who would like to be, to engage in ongoing research and curriculum development around this question. I'm especially interested in engaging with others about *formación* or political education for movement building. I envision an eventual book about political education or *formación*, perhaps best written collaboratively.

I'll be presenting a paper at the Latin American Studies Association Conference in May, so I may build on this and get more feedback there, or tackle a related piece.

I am interested to hear your suggestions about how this paper hangs together. It would be useful also to hear ideas you might have about other voices that could engage in this conversation.

I'd also be interested your advice about appropriate venues for publishing. I'd be interested in reaching readers of *Social Movement Studies* or *Mobilization,* or perhaps you have other ideas.

I look forward to meeting you all and to our conversations.

Thank you,
Alicia Swords

Formación, Conscientización and Movement Universities:
Political Education in the Americas

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In the last few years, in part due to the global economic crisis, diverse sectors of society have achieved high levels of mobilization in defense of human rights, social services and basic human dignity. The Arab Spring in 2011, occupations around the United States and around the world, and ongoing mobilizations by the poor and dispossessed have begun to bring the underlying social inequalities of our society into public consciousness.

The current economic and social crises we face demonstrate the need to understand the breadth and depth of the societal problems we're facing today, and the need to develop leaders who can and shape social movements for systemic change. To accomplish this, we need models of organizing and movement building that can go beyond the current models of community organizing that are dominant in the U.S. We need models that prepare leaders not only for mobilization, but also for long-term commitment and strategizing.

How can social movements cultivate and educate leaders who are prepared to fundamentally change the political and economic system in which we live? In U.S. organizing, there is a tendency to treat political education as enrichment, a luxurious "add-on" to the more necessary, more real work of "organizing"—door-knocking, fundraising, holding mass meetings, or protests. To create formidable social movements, we need deeper and more appropriate concepts to guide our practice. In this paper, I focus on conceptualizing political education based on the concepts of *formación* and *conscientización.* These concepts have been essential to the success of progressive and revolutionary movements in Latin America but do not seem as central in the dominant modes of organizing in the United States.

To begin, I clarify my epistemological and methodological approach to studying social movements, which is based on McMichael's (1990, 1992) method of incorporated comparison. After a brief review of political education in the organizing traditions and academic literatures in the United States, I examine two Latin American traditions that contribute to a concept of political education and leadership building. The first is the tradition of *formación de cuadros,* or cadre formation, in revolutionary movements and states. The second is the concept of *conscientización,* or consciousness-raising, put into practice by Paulo Freire and the Liberation Theology Christian Base Communities. I argue that for two significant social movements in Latin America, the Zapatista movement and the *Movimento Sem Terra* (Landless Workers Movement), *formación* and *conscientización* have been central. While there may be many challenges, incorporating these concepts as central components of social movement organizing in the United States may allow rich opportunities for greater long-term success in transforming the current political and economic system.

Epistemological decisions about studying social movements

In contemporary universities, the study of social movements, community organizing, political economy, history, political science, and strategy are all separate fields of study (See Buechler, 2011, p. 2). These separations block a holistic approach that comprehends the complexities that movements face.

One dominant approach, Sidney Tarrow, Douglas McAdam and Charles Tilly, inquires about how social movements respond to political opportunities (See for example Tarrow, 2001). The study of political opportunities or contentious politics is an important corrective to prior deterministic theories. In this perspective, movements operate in a context of changing political opportunities and constraints. They may take advantage of opportunities to advance their goals, and may be set back by constraints. But, as Plummer (2008) describes, in this orientation, "The emphasis on collective action within social movement literature in the form of protests, land occupations, and other actions overlooks much of a social movement's work" (p. 9). Some overlooked aspects of a social movement's work include the processes of leadership building and political education. Ganz (2010) notes that in spite of the "deep roots of leadership studies in sociology, especially within radically different authority regimes, social movement scholars have, with few exceptions, eschewed the project. A structural bias in social movement studies seems to have made it more productive for scholars to identify the constraining conditions that make certain outcomes more probable than to focus on enabling conditions that make many outcomes possible" (p. 521).

As scholars, we could better attune our research to the concerns of movement organizers and participants (See Bevington, 2005). Action Researchers such as Greenwood (1998) are clear that research should be co-generative involving "insiders" and "friendly outsiders." An Action Research inquiry should aim to address problems important to local participants and should increase participants' control over their own situations (p. 113). Rather than asking when movements emerge and the conditions under which they are successful, my experience is that movement participants tend to ask both about what they are up against and about the best combinations of strategies and tactics to make them most successful.

A common approach to studying social movements is to view social movements as units of analysis. As researchers and scholars, we are often encouraged to study social movements in the same way that some biologists might study an insect, under a microscope and separate from its habitat. We ask how movements are born, how they die, how they reproduce and grow. We focus on key actors or key organizations as the agents of social change. Scholars taking this approach have created a wealth of concepts for understanding the behaviors of activists and interactions within movement organizations.

Yet focusing on activists and their activities can take focus off of the historical, relational and contextual nature of human processes. What constitutes a movement is not a set of activists, meetings, or protests. What constitutes a movement is an evolving set of social relationships, a process by which a configuration or constellation of structure and agency change. With such a relational approach, Karl Marx, Antonio Gramsci and W.E.B. Dubois must be considered significant scholars of social movements in the sense that they offer approaches for studying the capitalist system, hegemony and counter-hegemony, and the shifting interests of different social classes within specific historical relationships.

Based on collective study with colleagues from the Polson Center Social Movements Research Working Group, I argue with McMichael (2010) that "viewing social movements as units of analysis, and comparing their attributes of coherence and efficacy, risks cultural and

historical abstraction" (p. 5). Instead, we propose that social movements should be studied as units of observation. Particular struggles should not be reified as "things" to be studied, but can be lenses for understanding broader political and economic processes when examined relationally. In this vein, studying social movements' political education approaches is not about comparing movements, but about examining "what we are up against" and drawing lessons for future organizing.

Incorporated comparison involves conceptualizing "instances" as "distinct mutually-conditioning moments of a singular phenomenon posited as a self-forming whole" (McMichael, 1990, p. 391). In conventional comparison, cases are treated separately, abstracted from their histories, whereas incorporated comparison treats instances as interrelated "outcomes or moments of an historically integrated process" (p. 392).[1] Cases or instances are "understood as relational parts of a singular (historically forming) phenomenon. Comparison is incorporated into the very process of defining the object of analysis, whether parts or whole" (McMichael, 1992, p. 672). Based on this logic, I study instances of political education, recognizing these as "parts" of what we might consider an "emerging whole" that represents the knowledge, accumulated throughout history that may provide lessons for social change.

Political education in the United States: Theory and Practice

In the United States, the practices of political education and leadership building have been built mainly through non-formal education within the organizing tradition of the labor union and civil rights movements. Myles Horton (1997) describes his work with Appalachian union workers and later at the Highlander Center with Civil Rights leaders in *The Long Haul*. Charles Payne (1995) documents what he calls "the Organizing Tradition," which includes the work of Septima Clark, Myles Horton, Ella Baker, Fannie Lou Hamer, Dorothy Cotton, the Southern Christian Leadership Conference (SCLC), and others (See M. Horton, 1997; Stokes-Brown, 1990). This tradition emerged through the educational work of the Highlander Center, Citizenship Schools and Freedom Schools, and in other informal settings. Patricia Hill Collins (2000) documents the "Midwife leaders" and "community othermothers" of the black feminist tradition. In *The Tradition that Has No Name,* Mary Belenky (1997) describes how women extend their traditional roles through nurturing modes of leadership in the U.S. Civil Rights Movement, as well as by the Madres de la Plaza de Mayo in Argentina. Robnett (1996) documents the significant roles women have played as "bridge leaders" in "micro-mobilization" or the ways in which individuals come to participate in movement organizations and identify with their goals (p. 1661).

Community organizers, movement leaders and participants have developed and tested

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[1] While positivist social scientists seek linear, causal relationships, Marx drew on Hegel's dialectics, which led him to look for the ongoing, reciprocal effects of social forces, relationships, contradictions, and conflict. Marx's methodology, outlined in his *Contribution to the Critique of Political Economy* (1857-58), is the basis for McMichael's incorporated comparison. In this piece, Marx proposes beginning with the "imagined concrete", and examining the social relations that produce the imagined concrete, and then, reconstructing from the return to concrete phenomena. Marx argues, "If, therefore, I were to start with the population, it would be a chaotic idea of the whole and through more precise determination I would arrive analytically at increasingly simple concepts; from the concrete as imagined to increasingly tenuous abstractions until I reached the most simple determinations. From there it would be necessary to take the journey again backwards until I finally arrived at population again, but this time not as a chaotic idea of a whole, but as a rich totality with many determinations and relations" (Marx, Karl. 1976. "Preface and Introduction to a Contribution to the Critique of Political Economy." Peking: Foreign Languages Press, p. 31.)

dignified and powerful approaches in practice. Yet there is little recognition of *formación* or a holistic approach to social movement education in English-language literature. Instead, scholars focus on micro-mobilization, recruitment, frame bridging, amplification, extension and transformation (See Robnett, 1996; Snow, 1986). In community organizing Stoecker (2001) distinguishes among "information models" that use popular education, "power models" and "development models." This typology acknowledges that many approaches to community organizing do not emphasize political education.

In courses on community organizing at Harvard's Kennedy School, Ganz (2009) who formerly organized with the United Farm Workers, emphasizes strategic capacity, or "how we turn what we have into what we need to get what we want" (p. 8). Ganz's notion of strategic capacity requires motivation, access to relevant knowledge, and deliberations that lead to new learning. These are some dimensions of political education. In later work, Ganz (2010) describes and calls for leadership development.

Since 2000, I have paid a great deal of attention to *formación* or political education and leadership development. At once these have been topics of academic study and practices in which I am engaged directly with youth, students, and poor people in local, national and international social movement organizations and networks based in the U.S., Mexico, and the Dominican Republic.[2] Based on academic training in feminist and Action Research, and research held accountable to a collective, I believe values and commitments are best acknowledged in research, both in terms of how they limit and enhance our understandings. Inappropriately celebratory research on social movements is at best misleading and at worst, dangerous. Beginning in 2002, I began a process of my own political education with the University of the Poor, and later with the Poverty Initiative, a U.S. network of poor peoples' organizations dedicated to building a movement to end poverty. Our focus is on developing leaders, a leadership core and a network of leaders and organizations in the movement to end poverty.

Poverty Initiative co-coordinator and long-time organizer Willie Baptist synthesizes his study of political education among successful movements with the "4 C's of leadership": leaders must be clear, competent, committed and connected. Yet Baptist's focus on leadership building is still not the norm in U.S. organizing efforts: in our experience, many organizations struggle to dedicate time and energy to political education. Baptist and Rehman (2011) write, "According to a widespread understanding of pedagogy, the oppressed and marginalized get a dumbed-down version of 'popular education' while the intellectuals connected to those in power get rigorous academic study" (p. 6). This project addresses the serious need we have to develop a comprehensive and holistic understanding of political education.

Formación de cuadros or cadre formation

In English, *formación* is sometimes translated as "formation," training, or leadership

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[2] From 2002 to 2004, I observed and interviewed participants and leaders among Zapatista organizations' political education activities, including local workshops, Mesoamerican forums of NGOs and grassroots organizations. I participated and observed in the Convergence of Peoples' Movements of the Americas 3rd Continental Assembly in Havana, Cuba (November 20-24, 2002); the Hemispheric Assembly against the FTAA in Havana Cuba (November 24-28, 2002); the World Social Forum, in Porto Alegre, Brazil (January 20-28, 2003); and the Kensington Welfare Rights Union's International Committee Exchange with the MST (Landless Workers Movement of Brazil), in Sao Paulo, Brazil, January 28–Feb. 2, 2003. Since 2006, I have also been engaged in ongoing research and collaboration with *Justicia Global,* an international organization based in the Dominican Republic. Our research has involved co-planning and co-leading a three-week international study program with the goal of political consciousness-raising and leadership development for U.S. college students and Dominican organizers.

building. Each translation points to certain aspects of the concept of *formación,* but all leave out some of the key dimensions of the concept that has been practiced in Latin American revolutionary contexts. Yet our lack of understanding of *formación* is not just a linguistic or definitional problem. McCarthyism systematically punished those who associated with communism and deterred people from associating with communism in the United States, leaving a huge impact on the theory and practice of revolutionary politics (See Schrecker, 2004).

In Latin America, *formación de cuadros,* or cadre formation, is the term used to describe holistic education and leadership building processes within revolutionary movements and within revolutionary states.

Formación in revolutionary movements and states

Within the context of revolutionary movements, *formación* is the vital process of developing revolutionaries. The goal is to cultivate the leaders, or cadre, who will develop the movement. Often, but not always, the goal is that these leaders will be prepared to assume direction of state institutions. The process includes recruitment, establishment of discipline, leadership, commitment, and militancy. It includes political education, or the teaching of theoretical and practical knowledge; analysis, strategy and skills. Specifically, the educational and training processes can be specialized to include military training, public administration, engineering, social work, etc. Historically, in contexts of revolutionary struggle, where the threat of external repression is always present, *formación* often has had to be clandestine.

Within revolutionary states, *formación* refers to the official, state-administered system of education and training, which aims to cultivate, educate and sustain the loyalty of leaders and masses. Two main reference points from Latin American serve as examples of *formación* in revolutionary states: Nicaragua and Cuba.

Because of McCarthyism's impacts in the U.S., scholars and social movement participants often have trouble culling the lessons from *formación* because we have learned about bureaucratic, dogmatic, Stalinist systems. Even today, it feels risky or questionable to write about communist educational training systems. Yet there are lessons to learn from the successes, failures and degeneration of an educational system that in some cases became absolutist, dogmatic, exclusionary and oppressive. Furthermore, today with the networked, high-tech economic organization of capitalism and society, people are increasingly excluded from work; the possibilities of welfare state reforms are far from possible. From the basic modes of social organization to the possible demands we can make, our forms of organizing must change. Lest we throw *formación* out with the bathwater, so to speak, let us examine some aspects of this concept that may be useful.

Conceptualizing political education via Antonio Gramsci [3]

Antonio Gramsci's continuation and critique of Marx's project contributes an analytical framework that is useful for conceptualizing and studying political education. Gramsci's questions emerge from his experience of the lack of a successful communist revolution in Italy. Even with a crisis of capitalism, because the subaltern classes failed to unify, they could not prevent fascism from taking hold. In this context, he is concerned to study the "superstructure" (Gramsci, 1999, p. 177), including political society, or public government institutions, police, and military, and civil society, or families, religion, educational institutions and trade unions (p. 12).

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[3] I am indebted to Mark Porter Webb, whose recent paper on Gramsci has helped me to clarify this section.

In his "Methodological Criteria," Gramsci outlines three moments of collective political consciousness: trade unions, reform movements, and revolutionary parties (1999, p. 180-181) (See Porter-Webb, 2012). Gramsci suggests that at a first level, participants develop trade union consciousness, or solidarity based on their commonalities with workers in the same trade. At the second level of consciousness, "consciousness is reached of the solidarity of interests among all the members of a social class" and there is a possibility for reform movements. A third moment is when

> one becomes aware that one's own corporate interests in their present and future development, transcend the corporate limits of the purely economic class, and can and must become the interests of other subordinate groups too. This is the most purely political phase… in which previously germinated ideologies…come into confrontation and conflict [until there is a] unison of economic and political aims, but also intellectual and moral unity… creating the hegemony of a fundamental group over a series of subordinate groups (p. 181).

In other words, revolutionary parties are only possible with a level of class consciousness with solidarity based on economic, political, intellectual and moral unity. Through these moments, Gramsci outlines a pathway for leaders to cultivate or build the consciousness of their collectives. In the following sections, I will explore Cuban and Nicaraguan contributions in attempting to develop revolutionary class consciousness through a model of cadre formation.

Formación in Cuba

The concept of *formación* includes dimensions that are attributes of individuals and of collectives. On an individual level, the goal of *formación* is to produce cadre who have developed political and social knowledge and skills. They are disciplined and accountable. Ernesto Che Guevara's writings describe the Cuban ideal for cadre, focusing on several key dimensions. First, in relation to their political development and communication skills,

> We should state that a cadre is an individual who has achieved sufficient political development to be able to interpret the extensive directives emanating from the central power, make them his own, and convey them as orientation to the masses; at the same time he also perceives the signs manifested by the masses of their own desires and their innermost motivations (Guevara, 1997, p. 129).

Second, Guevara writes,

> [The cadre] is someone of ideological and administrative discipline, who knows and practices democratic centralism and who knows how to evaluate the contradictions in our current methods in order to make the best of them. In the field of production, he knows how to practice the principle of collective discussion and individual decision making and responsibility (p. 129).

In terms of a third set of dimensions related to loyalty, courage, he continues,

> He is an individual of proven loyalty, whose physical and moral courage has

developed along with his ideological development in such a way that he is always willing to confront any debate and to even to give his life for the good of the revolution. He is, in addition, an individual who can think for himself, which enables him to make the necessary decisions and to exercise creative initiative in such a manner that does not conflict with discipline.

The cadre, therefore, is a creator, a leader of high standing, a technician with a good political level, who by reasoning dialectically, can advance his sector of production, or develop the masses from his position of political leadership (p. 129).

Development therefore is ideological, analytical, and by implication, even spiritual, since one is required to be prepared to give one's life. Cadre are responsible to people above and below them, and to a state or collective that purports to or aims to represent the interests of the people.

On a collective level, the system of *formación* for training cadre in Cuba is achieved through everyday tasks, but it is systematic (Guevara, 1997, p. 130), centralized, hierarchical, and ongoing. It is "organized, permanent, progressive, and must teach the knowledge and skills that allow for [cadre] to be collective, well-cohered, efficient and committed to the results that society demands of education" (González García, 2010, p. 3). According to a recent thesis on the Cuban educational system,

…cadre training should be perfected with the quality that is required, with research to design actions that help train cadre…based on knowledge and application of the pedagogical principles, educational direction, the social-psychological bases, laws and characteristics of training, to attend to the learning of the cadre and their reserves in accordance with their needs and potential (González García, 2010, p. i).

Certainly, this lofty vision is not always borne out in practice, yet the Cuban conception of *formación de cuadros* offers a vision of an educational system that cultivates leaders who have the capacity to run a revolutionary state.

Formación in Nicaragua

The concept of *formación* can be further elaborated based on the experiences of the Sandinistas in Nicaragua. With the victory of the *Frente Sandinista de Liberación Nacional* (FSLN) marking the end of the Somoza era in Nicaragua, the Sandinistas began a process of popular political education. In the period immediately following the establishment of the Sandinista government, political education occurred through the public burial of martyrs and heroes, as well as through political seminars and the mass media. According to EPICA (1980), the FSLN developed seminars for all popular organizations aiming "not to inculcate a pre-conceived ideology into the participants, but rather to enable the people to reflect on their recent personal experiences in relation to the revolutionary changes underway" (p. 90).

Primary, secondary and university-level "political preparation courses" were held as week-long orientations before regular classes began. At the National Autonomous University, the FSLN encouraged the faculty to prepare engineers and technicians to contribute toward the

physical reconstruction of the new society (EPICA, 1980, p. 91).   In the 1980 literacy campaign, the goal of the FSLN was not just to teach literacy, but also to "deepen the class awareness of student-literacy teachers through living with the poor families they are teaching" (p. 91).

According to Baltodano (2005), cadre formation in the FSLN was based upon a moral attitude; study of social sciences of Marxist ideas and of the experiences of struggle of other peoples; the study of national history from an anti-imperialist perspective; and study of revolutionary history and practices for the purpose of designing strategies. By necessity, *formación* had to be grounded in local realities. Revolutionary leader Carlos Fonseca wrote, "We will reach victory if we are able to prepare ourselves to lead the struggle with wisdom. We can acquire this wisdom if we know how to learn…. Every day we should be in contact with our reality and with the problems of the people" (Cited in Baltodano, 2005, p. 4).

Conscientización

Related to *formación* is the tradition of *conscientización*[4], which builds from the writing and work of Paulo Freire. Freire had just begun to implement a national system to teach adult literacy in Brazil when he was imprisoned by the military dictatorship. Later, he worked in Chile from 1964 to 1969 in the context of the Christian Democratic party reforms of Eduardo Frei's administration (Kirkendall, 2004). Freire's practice of *conscientización* is acknowledged as one of the philosophical and pedagogical influences on liberation theology and the praxis of Christian Base Communities across Latin America.[5]

In *Pedagogy of the Oppressed*, Freire (1970) describes oppression as dehumanizing for both oppressor and oppressed (p. 43). He explains that the oppressed must liberate themselves and their oppressors. "To surmount the situation of oppression, people must first critically recognize its causes, so that through transforming action they can create a new situation, one which makes possible the pursuit of a fuller humanity" (p. 47). A basic idea in Freire's writing is that oppression is internalized in our consciousness.

> One of the gravest obstacles to the achievement of liberation is that oppressive reality absorbs those within it and thereby acts to submerge human beings' consciousness… To no longer be prey to this force, one must emerge from it and turn upon it. This can be done only by means of the praxis: reflection and action upon the world in order to transform it (p. 51).

Freire's (1970) pedagogy critiques banking education, or the conventional modes in which bourgeois experts impart information to receptive students. Instead, his pedagogy involves a two-phase process of critical reflection. Subjects first "unveil the world of oppression and commit themselves to its transformation. In the second phase, this pedagogy "becomes a pedagogy of all people in the process of permanent liberation" (p. 54). Freire writes that in both stages, "It is always through action in depth that the culture of domination is culturally confronted," and notes that this is the fundamental aspect of Mao's cultural revolution (p. 54).

Freire's literacy program in Chile took shape in the context of the Cold War, in which literacy rates were highly politicized measurements for the effectiveness of one or another

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[4] I have decided to use the Spanish term instead of Freire's Portuguese term *conscientização* because the concept was popularized as "conscientización" throughout the mostly Spanish-speaking Latin America.
[5] Interestingly, Paulo Freire and Highlander Center founder Myles Horton knew each other and had the opportunities to reflect together on their practice. Their dialogues are documented in *We Make this Road by Walking* (1990).

ideological position. The Cuban Revolution had reduced illiteracy from 23 percent to 4 percent of adults, and the United States Alliance for Progress determined to end illiteracy in Latin America by 1970 as part of is program to introduce social reforms that would prevent revolutions (Kirkendall, 2004).

The basic process Freire proposes is implemented through religious ritual and in the daily practices of base communities. Some of the key characteristics of *conscientización* include the bringing to consciousness of internalized power and powerless, iterative practice of action and reflection, and a pedagogical mode involving generative questions, critical reflection and praxis.

Contemporary Political Education and Leadership Development

In this next section, I will focus on two contemporary organizations in Latin America that have taken up and adapted the traditions of *formación* and *conscientización* to contemporary political and economic contexts. I will share a few notes on how these organizations accomplish their political education and leadership development.

The *Movimento Sem Terra* (MST, or Landless Workers Movement of Brazil)

The *Movimento Sem Terra* (MST) in Brazil today represents one of the largest movements in the world (Vanden, 2005). The movement is responsible for organizing 1.5 million landless workers, for housing 350,000 families and for settling communities in a land area larger than Italy (Starr, 2011). How is this possible? As one organizer described in a 2003 interview, when the landless create an encampment, preparing for and then living in an encampment is a school in itself. The system of *formação* also involves systematic study. The MST's system of *formação* (Portuguese for *formación*) builds on existing organizations' practices, creates different levels for the masses, members and leaders, including higher-level training, and ultimately has established the movement's own institutions of higher learning.

Plummer (2008) describes the MST's development of *formação* in three periods. First, in 1986-1990, the MST worked with the union movement, church, and other existing organizations to organize leadership courses for the emerging participants. Trainings focused on addressing the immediate necessities and organizational needs of the encampments and settlements.

Second, in 1990-2000, the MST realized they needed to create training programs focused on the needs of specific settlements. They created a method called *Mini Laboratórios*, later known as *Formação Integrada à Produção* (FIPs), in which participants came from around a region to stay in an MST settlement for up to thirty days. This allowed for settlements to exchange ideas and experiences. The MST also created its own National School in Santa Catarina, where it established new courses including a training course for militants.

Third, after 2000, the MST has created national *formação* campaigns; it finished building and opened the National School in São Paulo; established new stages of training for the higher levels of *dirigentes* (leaders) and *militantes* (militants)*;* continued to pressure the government to provide education, health and support for small agriculture; and partnered with the state on specific projects like teacher training. The MST defines political *formação* in a document of their National School as:

> ...the process of raising the level of consciousness of the militants, movement members, and the masses. *Formação* is the force that makes ideas, strategies, the program, the methodology and the organizational principles and structures commonly known and collectively constructed. It is information made into

knowledge, a material force that transforms nature and society and is never simply scholarship or academicism (Peloso 2007, quoted in Plummer 2008, p. 44).

According to the same document, another aspect of this practice is that it involves commitment and creativity.

Formação happens when militancy is put into practice and when there is a deep commitment to the cause. To participate in *formação*, one must know the leaders, care for them, accompany them through good and bad times, and contribute to their overall development of leadership abilities. Leaders must understand and take in the contents and methodology of *formação* in order to creatively multiply leadership, instead of being the simple reproduction of obedient followers (p. 44).

Part of the creativity is that a central part of *formação* is *mística*, translated roughly as mystique, by which the MST means "a praxis of pedagogy and culture" that contributes to building collective identity (Issa, 2007). *Mística* builds on Catholic ritual and the spiritual mysticism of liberation theology, and is the representation through words, art, symbolism, and music of the struggles and the reality" of the MST" (Plummer, 2008, p. 41).

The MST has created its own movement university, called *Escola Nacional Florestan Fernandes*, a highly developed, formal institution. Over a thousand members of Brazilian social movements built the school between 2000 and 2005. It offers several levels of training, including *formação de base,* and trainings for *militantes* and *dirigentes*. Between 1984 and 2002, 102,180 participants took part in short, medium or long-term courses with the MST (Plummer 2008). The school has also allowed the movement to deepen relationships with other members of civil society, including professors, elected officials, architects, engineers and artists.

Formação in the MST may provide interesting lessons for other movements. While on one hand, the MST's process demonstrates rigor, a developmental process of growth, and the importance of levels, it is also an inherently creative process involving, rich cultural symbolism and depth of meaning.

The *Ejército Zapatista por la Liberación Nacional (EZLN,* or the Zapatistas of Mexico)

In prior work, I document the significance of political education in the Zapatista uprising and continued pro-Zapatista organizing in and beyond Chiapas, Mexico (Swords, 2005, 2007). My understanding of this concept of political education was based on observing work by the grassroots network of neo-Zapatista organizations and grassroots organizations in Chiapas and Southern Mexico including *CIEPAC, SIPAZ, Alianza Cívica, La Asociación Tepeyac,* and others.

Among the organizations that learn from and extend the work of the Zapatista autonomous communities, political education is central and constant. Popular educators from *Alianza Cívica* and *CIEPAC* spoke of Freire as an important reference even as some rejected the "educator as interventionist" model. Those who referenced Freire combined elements of his pedagogy with local practices. Pedagogies synthesize many approaches, including agricultural extension, public school pedagogies, the pedagogical style adapted by the Catholic diocese, and local indigenous practices.

One type of workshop I witnessed in several different contexts was called "Conjunctural

Analysis" of the political, economic and social realities in the state.[6] Participants were asked to divide into groups by region and answer a series of questions. Their answers were aggregated into a state-wide analysis. As participants reflected together, they were able to identify larger sociological processes that affected people differently across the state. In one workshop, participants concluded that government-funded programs were dividing communities, and that the removal of indigenous peoples and *campesinos* from land had led some communities to invade lands, and some people to move to cities where they struggle to find work. This methodology for Conjunctural Analysis is documented in a series of popular educators' manuals illustrated in comic book form (Valencia Lomelí, 1995).

In another form of political education, organizational leaders created space for participants to "work through" personal experiences by shaping organizational narratives as counter-narratives to individual experiences of fear and suffering. For example, the Indigenous Women's Collective[7] challenges the collective memories of suffering alone on plantations, by running a cooperative through which they socialize their risk, rotate shifts and share gains equally. They create educational-organizational responses to individual experiences of domestic violence and sexual abuse by starting a shelter for battered women and by educating women and men about men and women's legal rights. With corn mill and corner store cooperatives, they enact collective rights to security and income. They thereby challenge tendencies toward privatization and concentration of property rights in corporate property.

In 1999, the Zapatistas initiated an Indigenous Rights Referendum or *Consulta*, which created a nation-wide consciousness-raising and political education process. The EZLN, along with its civil base of support, asked Mexicans to vote on including indigenous peoples in Mexico's national project, recognizing indigenous rights in the San Andrés Accords, demilitarizing the country, and about self-organization toward "rule by obeying." The government consented to allow free movement of the Zapatistas if they remained unarmed.[8]

Leading up to the *Consulta*, members of EZLN and thousands of civil society volunteers created educational forums with local organizations throughout Mexico. At least 851,858 people participated in organizing 4,811 working groups and assemblies around the country (Sámano Rentería, 2000). Five thousand Zapatista representatives, approximately half women and half men, visited municipalities around the country to raise awareness about indigenous rights. This process constituted a massive networked popular education campaign. The organizers, Zapatista delegates, volunteers from *Alianza Cívica* and other civil organizations, gained face-to-face contact with community members and leaders. The EZLN showed publicly that they were unarmed, and demonstrated their capacity as indigenous civic educators, teaching about

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[6] Valencia Lomelí (1995) notes that this methodology had a boom in Mexico in the 1970s with journals, committees, and organizations dedicated to its use. It guided research and practice by seminaries, human rights organizations, unions, ecologists, feminists, farmers, etc.

[7] This is a pseudonym to protect the identities of the participants.

[8] The *Consulta* asked, "1. Do you agree that indigenous peoples should be included with all their strength and wealth in the national project and take an active part in building a new Mexico? 2. Do you agree that indigenous rights should be recognized in the Mexican constitution according to the San Andrés Accords and the corresponding proposal of the Commission for Peace and Reconciliation of the Congress (COCOPA)? 3. Do you agree that we should achieve true peace through dialogue, demilitarizing the country by returning the soldiers to their barracks as the Constitution and its laws establish? 4. Do you agree that the people should organize themselves and demand the government to "rule by obeying" in all aspects of national life?"

democratic participation and the right to have rights. The *Consulta* itself was an educational tool. In a 2004 interview in San Cristóbal, Marta[9] from *Alianza Cívica* explained,

> When you promote the *Consulta*, you have to explain what it is about and what you're asking. That phase is the educational component. It's not just the result of the *Consulta* that's important, but the process of education, and of organizing the voting too.

The practice of neo-Zapatista organizations illustrates the integration of political education in all aspects of organizing. Political education is a process for responding to individual pain and suffering in local organizations, and it is used to analyze state-wide commonalities and differences, and is also used massively on a national scale.

Challenges to developing political education among U.S. social movement organizations

In our efforts in the U.S. to build a movement to end poverty, we are determined to unite organizing and education. It is my hope that the opportunity to learn from the theory and practice of political education, *formación* and *conscientización*, may guide us in a useful process of self-reflection. It will be important, as we strive to further integrate political education into our organizing, to remember the holistic nature of this concept in Latin American contexts.

There are, however, several challenges we face in developing and deepening political education in the U.S. In the U.S., the dominant culture of anti-authoritarianism leads to a lack of trust of leaders. It is difficult to create systems of accountability when people mistrust efforts toward mentoring as overbearing or with skepticism regarding a mentor's motives. Many of us might ask, "How could anyone know what is best for me better than I do myself?" To combat common knee-jerk resistances, processes of political education require that leaders prioritize the cultivation of deep levels of respect for all at the personal, emotional level.

Some challenges also come from the prevailing culture of organizing. As Baptist and Rehmann (2011) note,

> Although the community organizing field has provided sophisticated methods for putting poor people into motion (e.g., the Alinsky model), the institutions that drive those methodologies usually do little to develop knowledge of structural inequities and are often confined to ad hoc mobilizing for "realistic" goals—this in part caused by the tremendous influence of American pragmatism, which tends to separate practice from theory and thereby leads to eclecticism and narrow categorical thinking (3).

The prevailing culture and practices of non-governmental organizations are shaped by outcome models and focused on measurable deliverables. In this scenario, funding influences the behavior of social movement organizations to focus on outcomes that can be counted—one-on-ones conducted, people in attendance at meetings or protests, laws changed. Organizations tend to prioritize mobilization rather than the commitment of leaders they cultivate, or research to hone their strategic direction. Political education may focus on teaching members skills for running organizations, but not on transforming consciousness. Funding also prioritizes organizing by identity groups, but not organizing across identities. This means that many organizations may reach Gramsci's trade union consciousness, or consciousness to demand

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[9] Not her real name.

reforms. But unlike the MST, we do not yet have practices or processes to create revolutionary consciousness.

As the cost of social reproduction has risen, with rising costs of health care, housing and education, we are all feeling intensified time pressures. If political education is treated like "one more thing to do," it may never become a priority. Yet if we understand it as many in Latin America have, as *formación* or *concientización*, a daily practice integral in all our activities, it may be possible to strengthen the work we do to transform current political systems.

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