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# SPECIAL REPORT

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## ABOUT THE REPORT

This report highlights key strategic functions and outcomes of education and training in nonviolent civil resistance movements around the world. Funded by the United States Institute of Peace (USIP), it draws on findings from research, trainer and participant interviews, and the author's experience with nonviolent civil movements.

## ABOUT THE AUTHOR

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*Nadine Bloch*

## Education and Training in Nonviolent Resistance

### Summary

- The three nonviolent methodologies identified in seminal works are protest and persuasion, noncooperation, and intervention. Somewhat overlooked is a focus on organization or capacity building, which includes education and training.
- Education and training fulfill a critical strategic function in capacity building by helping build certain key components of successful movements: planning, unity, and discipline.
- Historical examples from Germany, the Philippines, Serbia, and the United States demonstrate this instrumental role.
- The education and training methodology and philosophy developed during the U.S. civil rights movement of the 1950s and 1960s became a model for the campaigns and movements that followed.
- The Yellow Revolution in the Philippines to restore democracy in the mid-1980s was built on education that enabled the powerless to strategically address the regime's power and on training to effectively challenge authority.
- The nuclear power industry in the United States and Germany was stymied by a determined transnational grassroots movement in the 1970s and 1980s. Critical to its success were strategic planning, nonviolent action, consensus decision making, and legal processes.
- The Serbian civil protest group Otpor! grew from a handful of students into an eighty thousand-person movement that proved instrumental in overthrowing a dictatorship and helping establish a democracy. Training was key.
- Although policy-relevant research on civil resistance is expanding as the number of popular movements increases, the strategic value of education and training in such movements remains relatively understudied.
- Four historical examples of successful nonviolent movements suggest five general and actionable strategic functions of education and training.

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SPECIAL REPORT 394

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### CONTENTS

|  |    |
|--|----|
| Why Emphasize Training and Why Now?    | 2  |
| Capacity Building and Civil Resistance | 3  |
| Limitations of Education and Training  | 11 |
| Education, Training, and Social Change | 12 |
| Conclusion                             | 14 |
| Appendix: Case Study Matrix            | 15 |

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## Why Emphasize Training and Why Now?

Over the past several decades, civil society's potential to bring about change without resorting to violence has been demonstrated in diverse social and economic environments worldwide. From the successful uprisings against dictatorships in Serbia, the Philippines, and Chile to the civil rights movement in the United States and the more recent popular movements in the Middle East, North Africa, Burma, Brazil, and Venezuela, the efficacy of nonviolent direct action has been improved by strategic and skillful use of education and training.

Even against seemingly insurmountable odds, under brutal regimes and during violent conflict, grassroots movements have effectively harnessed nonviolent strategies. Indeed, over the past century and more, nonviolent resistance movements have been twice as successful in achieving their aims as resistance movements that embraced violence.<sup>1</sup> These triumphs in large part owe to a long-standing tradition of preparing communities to take safe and strategic nonviolent action (NVA) through education and training (for definitions, see box 1).

### Box 1. Key Definitions

We examine education and training undertaken specifically to address the functional needs of a campaign, often within the framework of a civil resistance movement. Education is defined as the process of receiving or giving systematic instruction. It can be formal, as in at a school or university, or informal, as in a grassroots education experience. It may or may not have a specific associated outcome. Training is defined as the action of teaching a person a particular skill or type of behavior. It can be thought of as education with a specific defined outcome. The scope of nonviolent action education and training can range from an hour or less of preparation for a specific event to the equivalent of semesters of a college-level course, depending on campaign goals, organizational needs, and available resources. Education and training topics include political and NVA theory and philosophy, NVA skills, creating and using media, street medic/first aid care, action logistics, outreach, legal support, deescalation tools, peacekeeping, PTSD, mass mobilization platforms, team building, leadership, decision-making process and tools, strategic planning, creative and cultural tactics, anti-oppression, cultural competency, facilitation, third-party nonviolent intervention, and more.

Government agencies, intergovernmental agencies—including the United Nations (UN)—and many international nongovernmental organizations (NGOs) have also recognized the potential for reducing violent conflict by supporting civil society movements and actors. Eleanor Openshaw of the International Service for Human Rights underscored the connection between peace and a strong civil society when she observed, with respect to the adoption of UN Security Council Resolution 2171 (Maintenance of international peace and security—Conflict prevention), that “Through this resolution the Security Council has recognised that efforts to prevent and resolve conflict are strengthened by a vibrant civil society.”<sup>2</sup>

In July 2014, the U.S. Institute of Peace hosted a workshop to identify the key challenges and opportunities in using technologies to support nonviolent civic movements in the twenty-first century. The civic activists, policymakers, technologists, NGO leaders, and education professionals participating in the workshop noted the power of training to support movement-building, the development of appropriate skills and knowledge, planning and innovation, and access to materials.<sup>3</sup> Peer-to-peer capacity-building training, participatory workshops, locally based clinics, and mentoring were identified as robust elements of an approach emphasizing civil society engagement.<sup>4</sup>

The impact of training can be seen in the success of the Ukrainian Orange Revolution and the Georgian Rose Revolution.<sup>5</sup> Specifically, the Georgian youth group Kmara (Enough) significantly improved its planning and execution after its activists were trained in NVA methods and strategy by veterans of Serbia's Otpor! (Revolution!) movement in 2003. Similarly, in the civil uprising against Philippine president Ferdinand Marcos, civil resistance education and training helped turn "nuns and priests into skilled organizers who readily commanded the crowd's attention."<sup>6</sup> Training also helped Papuan nonviolent civic activists and leaders in their struggle for self-determination from Indonesia "reflect on how they wage the struggle, conduct a cost-benefit analysis of different methods, and at the same time build strategic capacity by bringing diverse groups of activists together and supporting collective reflection of what has worked, what has failed and why."<sup>7</sup>

## Capacity Building and Civil Resistance

In his seminal 1973 work, *The Politics of Nonviolent Action*, scholar Gene Sharp identifies three broad NVA methodologies: protest and persuasion, noncooperation (social, economic, political), and intervention.<sup>8</sup> Somewhat overlooked, however, is a focus on the critical and foundational role of organization or capacity building in successful social movements. Without consistent, transparent, realistic ways of planning, recruiting, training, preparing, and unity building, the sustainable process and structure of movements would be severely limited. Achieving political, economic, and social change depends as much on successful education and training as on the higher-profile tactics and strategies of nonviolent civic action.

NVA education and training to achieve capacity building in civil resistance campaigns spans a fairly wide spectrum of activities and formats, as well as duration and intensity of training, depending on campaign goals, organizational needs, and available resources. The activities involved range from those appropriate to supporting big-picture movements—such as strategic planning, analysis, and theory development—to those suitable for specific skill and capacity building. These more specific activities include leadership and team development, logistics exploration, cultural and arts work, anti-oppression education, media response skill development, medical response skill development, and mass mobilization training. Integral to campaign and movement-building trajectories, education and training help support strategic planning, shared theories of change, unity of purpose and vision, and effective tactics, as well as strengthen commitment and adherence to NVA. In this report, the functions of education and training and the ways in which they contribute to nonviolent societal change are explored in four typological examples and five case studies. These cases highlight the value of training in strengthening the likelihood of meaningful change as well as the lessons and practices that have enabled nonviolent movements to become more disciplined and resilient.

Background research and interviews with experts in the field of NVA and social movements, and with trainers involved in specific campaigns, were used to identify common patterns across four disparate but successful movements, three of which were focused on political and social change. All of the cases reflect community-based movements. The fourth—anti-nuclear power movements—reinforces the success of education and training at the community level. Although each movement intentionally used education and training to address its particular needs, the tactics and strategies served different functions. Education and training were used as a key to creating discipline and common ground as well as a spiritual and intellectual foundation for the U.S. civil rights movement; as key middle-class mobilization tools in the Philippines; as preparation for sustained tactical occupation of sites of proposed nuclear power stations during the anti-nuclear power movement in the

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United States and Germany; and as part of a multipartite recruitment drive for the Serbian pro-democracy organization Otpor!. These examples highlight the functions and a few of the outcomes of intentional training and education.<sup>9</sup>

### ***U.S. Civil Rights Movement***

The strategic and philosophical cornerstones of the civil rights movement in the United States were NVA theory and practice. The two main expressions of the commitment might be loosely described as NVA education and training and as political education or citizenship schools. The former were supported by the Fellowship of Reconciliation (FOR) and the War Resisters' League (WRL), the latter by the Highlander Folk School and the Southern Christian Leadership Conference (SCLC).<sup>10</sup>

The education and training component was deeply rooted in a culture of analysis, political education, and training that grew out of the work of the Christian-based FOR, which formed after World War I to focus on NVA. The WRL formed shortly after that and worked alongside FOR, supporting education and training from a secular orientation. Staff of both organizations brought depth and experience to civil rights strategizing, organizing, and training. FOR's James Lawson and WRL's Bayard Rustin in particular helped steer Martin Luther King Jr. toward embracing Gandhian active nonviolence principles and NVA strategies within a spiritual Christian framework.<sup>11</sup>

In 1942, an offshoot of FOR formed the Congress of Racial Equality (CORE), which was dedicated to using principles of nonviolent resistance in support of desegregation. Bayard Rustin was one of the educators and trainers who led classes and workshops to prepare participants to confront potential violence and incarceration. The educational and training materials incorporated lessons learned from earlier segregation challenges, including actions protesting the segregation of a Cleveland swimming pool in 1941. In 1947, the Journey of Reconciliation, an early integrated freedom ride, was followed by month-long NVA workshops and training sessions in Washington, DC, which CORE continued to run for ten years. The training methods drew on theories of change grounded in philosophical nonviolence strategies and skills, such as the power of turning the other cheek and maintaining a moral high ground, as well as organizing methods.<sup>12</sup>

The Student Nonviolent Coordinating Committee (SNCC) grew out of the Nashville resistance scene. In 1959, James Lawson began weekly participatory training sessions for youth using role-playing, stories, and discussion, focusing in particular on whites-only lunch counters in department stores. As Joanne Sheehan of WRL reports,

Lawson facilitated a process of empowerment for the young black students living in a segregated society, where they developed a sense of their own value. They learned how to focus on the issue of racist segregation and choose a target. Not believing in hierarchical leadership, Lawson organized a central committee which was open to those taking the trainings. As the students developed a strategy to desegregate stores, they learned to organize, conduct a demonstration, negotiate, and deal with the media. They role played the physical and verbal abuse they would receive when they sat at a segregated lunch counter, learning how to nonviolently resist the impulse to run or fight back. Their three month campaign—which was preceded by six months of trainings—was a success, and the restaurants and stores of Nashville were desegregated. Nashville became a model for campaigns and trainings. Eight of the young black students went on to be key organizers of major campaigns in the civil rights movement and beyond.<sup>13</sup>

A major component of the training was helping participants manage fear. Sessions with lawyers to learn how to navigate the legal system and understand the anticipated arrest

process were paired with singing to uplift and build courage.<sup>14</sup> Specific instructions, such as how to roll into a fetal position to protect oneself in case of a physical attack, instilled in activists a feeling of preparedness. Many of the possible situations of abuse that activists might encounter during actions were role-played to reveal both possibilities and personal limits. As Mary E. King, now a professor of peace and conflict studies, relates, “We SNCC workers always carried a toothbrush in our pocket, as it connoted readiness for being locked up and the acceptance of penalties—which is at the core of noncooperation and civil disobedience—and since all of us did this it also signified that we were bonded together.”<sup>15</sup>

In 1964, the SNCC was instrumental in creating the Mississippi Freedom Schools, which ultimately comprised a network of forty-one schools, open for three months, dedicated to linking learning to liberation from segregation and offering a vision of how to transform the American South. The process of preparing the mostly white volunteer teachers from the North included sessions in everything from black history to NVA and significant soul-searching.<sup>16</sup> The classroom pedagogy was rooted in the belief that responses to oppression had to grow out of the experiences of those who were oppressed. Popular education (critical pedagogy) methods were used to empower students to take control of their learning and thereby create social change. An elicitive and participant-centered format was encouraged for the classes; it was reported that teachers often had students sit in a circle rather than in traditional rows as a physical manifestation of inclusiveness.

Another major figure from the civil rights era, Septima Poinsette Clark, promoted political education through a citizenship program in the 1950s at the Highlander Folk School, which was designed to teach literacy and civic rights while expanding voter participation among disenfranchised blacks in the South.<sup>17</sup> The Highlander Research and Education Center, as it is known today, was and remains a critical gathering place for activists and trainers committed to NVA and a locus of political and popular education in fighting racism and other types of oppression.

By 1958, thirty-seven adults were able to pass the voter registration test (used as a legal barrier to suppress black voters) as a result of the first session of community schools. When Highlander shut down in 1961, the SCLC took over the program and expanded its reach. Eventually the citizenship school project trained one hundred thousand teachers who then led citizenship schools throughout the South, a huge and impressive popular education program that addressed topical issues of racist power imbalances in the U.S. voting system and aimed to effect positive social change. This in turn supported the voter registration of about seven hundred thousand African Americans by 1969, in large part because of the establishment of the citizenship schools and Septima Clark’s vision.<sup>18</sup>

By addressing adult literacy, the classes also helped build individual agency and capacity. Lessons were connected to the current events of the day and focused on civil rights, voting rights, community leadership and organizing, and the nonviolent campaigns then taking place. This was a clear effort to involve rural communities in the civil rights movement and to lay the foundation for developing leadership and collective process skills. Miles Horton, who had founded the Highlander Folk School in 1932, wrote from his experience with citizenship schools that “educational work during social movement periods provides the best opportunity for multiplying democratic leadership.”<sup>19</sup>

The SCLC also maintained a full schedule of training and education programs. An explanatory flyer from the 1960s lists seven: voter registration, political education, citizenship education, operation breadbasket, direct action, operation dialogue, and nonviolence and leadership training.<sup>20</sup> Because the SCLC was affiliated with churches across the South, these sessions were designed to situate the civil rights struggle in a moral context so as to speak directly to the congregants.

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The myriad training sessions and classes offered under the penumbra of the civil rights movement continued a long-standing tradition of preparing and empowering communities to engage in strategic, safe, and effective NVA. Trainers also experimented, innovated, and refined the training methods to deliver a sustained mass mobilization characterized by adherence to nonviolent discipline, unity of diverse participants, and effective action. The training methodology and philosophy became a model for the campaigns and movements that followed, including the Vietnam War protests and the global anti-nuclear weapons movement.<sup>21</sup> Many have asserted that the South Africa liberation struggle drew considerable inspiration from the U.S. civil rights movement: “After his release from prison in 1990 and rise to the presidency, Mandela would often pay homage to Rev. Dr. Martin Luther King Jr. and the Southern civil rights movement, which he said were an inspiration to him and other anti-apartheid activists in South Africa.”<sup>22</sup>

### ***Filipino Yellow Revolution***

The 1983–86 Yellow Revolution in the Philippines was fueled by a commitment to NVA from a cross section of the lower and middle economic classes of Filipino society. Their work to remove the dictator President Ferdinand Marcos from power and restore democracy was built on education that enabled the “powerless” to analyze how to strategically address the regime’s power and on training in how to effectively challenge authority.

Historically, nonviolent resistance had been practiced in the Philippines as far back as Spanish colonial times. In its traditional context, NVA was a tool used mostly by poor rural communities, and therefore was decentralized and addressed local issues. It was based on small, flexible groups of activists that operated with autonomy, often in concert with other affinity groups working on similar issues. Resources included the seminal 1974 manual *Organizing People for Power*.<sup>23</sup> This work was used as a political education manual to support the powerless in analyzing power and in strategic thinking on how to challenge authority, usually at a local level.

The training for these situations focused on maintaining discipline and executing effective actions; it was usually provided by local radical clergy or affiliated laity. This background was the foundation for people’s strikes (*welgang bayan*), boycotts, and other large protests in 1984 and 1985. The opposition leadership formed a left-wing alliance of five hundred grassroots groups that turned out more than a million people trained in nonviolent discipline who maintained that discipline during a series of general strikes.<sup>24</sup>

It was not until after the democratic opposition leader Benigno Aquino was assassinated in 1983 that the middle class was ready to join the uprising against the Marcos dictatorship. A Catholic community of nuns invited trainers from the International Fellowship of Reconciliation to lead workshops in NVA that included political education and power analysis, and this outside influence had a dramatic effect on mobilizing the middle class, the opposition elites, and the Church. A newly created Philippine chapter of the Fellowship of Reconciliation organized forty NVA training sessions in thirty provinces. About 1,500 people participated in the three-day workshops, which included history, philosophy, and strategies of NVA and focused on the biblical traditions of NVA and on the sociopolitical situation.<sup>25</sup>

The training team included the French Austrian husband-and-wife team of Jean and Hildegard Goss-Meyer, the Americans Richard Deats and Stefan Merken, and a group of six students from Union Seminary who were part of a larger activist group called Friends of Jesus. For fear of arrest by the Marcos regime, the workshops were by invitation only, held in various community venues, and not publicized. Participant Richard Deats reported,

We did role-plays, where participants would take assigned parts, such as a tenant farmer dealing with an oppressive landlord, or a worker stopped by an armed soldier for questioning. We talked about “the pillars of oppression,” e.g., the army, the government, the upper class. Participants shared their opinions and experiences and began to feel strength that came from verbalizing and acting out internal struggles that often had been held in silence. Learning of what had happened in India, in the US and other places was a powerful incentive for action.<sup>26</sup>

The training paid off, as thousands embraced the potential of people power and prepared to take to the streets. The protesters had learned from studying historical resistance movements. They set up affinity groups and adopted simple and powerful tactics: link arms, drop down in case of attack, don't run, move in a deliberate manner. When tear gas was thrown, the front row of demonstrators would disperse and be replaced by those in the back.<sup>27</sup> The protesters were prepared to work under pressure and make prudent, safe decisions in the streets. The safety of protesters was enhanced because the local police and military on the ground saw their adherence to NVA and recognized the value of the unarmed protesters' protection of renegade troops refusing to follow Marcos' orders.<sup>28</sup>

Growing awareness of the power of NVA enabled many Filipinos who wanted social change but were wary of armed struggle to become involved activists. The appeal of NVA as a strategy united the leftists and the conservatives in their opposition to the Marcos regime. The relative openness of Filipino society to adopting NVA may have been tied to the country's widespread acceptance of Christianity and the historical use of NVA by the local clergy. Mobilizing the middle class was particularly important as the scope of the movement significantly expanded; in addition, the training was effective because it targeted the middle classes and used the teachings of the Catholic Church to promote acceptance of NVA. The trainings enabled people, particularly the middle class, to build solidarity and common cause as well as coalesce as a unit.

Four days after Marcos attempted to steal the election in February 1986, he was forced to flee. The world had witnessed a remarkable four-day bloodless revolution. Behind this achievement, however, lay years of training and preparation based on situational analysis of political power dynamics, along with ethical and pragmatic commitments to NVA and mass participation.

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### ***Anti-Nuclear Power Movement***

The nuclear power industry in the United States and Germany was stymied by a determined grassroots movement dedicated to nonviolent resistance in the 1970s and 1980s. Since 1977, no new ground has been broken for nuclear plants in the United States. In Germany, the construction or planning of many proposed plants and storage facilities was stopped, and the country has since committed to a complete phase-out of nuclear power by 2020 following the Fukushima nuclear disaster. Critical to the success of the popular resistance were comprehensive preparatory workshops in strategic planning, NVA, consensus decision making, and legal processes.<sup>29</sup>

**New Hampshire.** From its first action, the Clamshell Alliance—the New England organizing body of the U.S. anti-nuclear power movement, which was fighting the proposed two-unit nuclear power plant in Seabrook, New Hampshire—required all participants who risked arrest to undergo training.<sup>30</sup> Workshops included role-playing of court trials and incarceration, as well as sessions spent learning how to share leadership and overcome oppressive societal behaviors. The training linked participants to the history of civil resistance. The education and training programs of the anti-nuclear power movement in the 1970s and 1980s were heirs to the seminal NVA training of the civil rights era, and many of the trainers

and participants were veterans of successful actions that had been mounted by FOR, WRL, the SNCC, and the SCLC.<sup>31</sup>

The Clamshell Alliance required attendance at intensive, six- to eight-hour training sessions for its action participants. This requirement enabled the activists to maintain discipline in collective decision making as well as NVA, in comparison with movements that did not engage in mandatory training. The Clamshell Alliance actively engaged its opposition using training as an asset: activists were able to parlay training into a tool for deescalation on-site and in advance through the public promulgation of action guidelines and a commitment to NVA discipline. As Paul Gunter, an anti-nuclear power activist since the 1970s and now with the organization Beyond Nuclear, explains, “Our folks were disciplined, we were not going to destroy property, we had clear guidelines, and we could then establish this trust about why we were really there, and to keep the action on point, on issues about nuclear power, not on property destruction [or] rebellion but on nukes.”<sup>32</sup>

According to Kristie Conrad, organizer and founding member of the Clamshell Alliance, “A large part of the training was role-playing...so that you could...prepare yourself for various scenarios...We would role-play, with half of us being police officers and half of us being demonstrators...so that people could have the opportunity to at least experience it and give some forethought to it so that should we get in that situation we would know what to do.”<sup>33</sup> Understanding the police perspective was a critical strategy—not only because it helped participants to better understand the context, but because the training became a precondition to the state of New Hampshire allowing the protests. Gunter acknowledges that in June 1978 the organizers negotiated with the New Hampshire attorney general regarding terms for the protesters to stay on site overnight for the three-day encampment. People who had not gone through extensive training were turned away and not allowed to remain. In effect, the training was recognized by the state of New Hampshire, and the Clamshell Alliance honored and enforced the agreement.

Through the training sessions, many participants got both their first exposure to a feminist perspective and an opportunity to explore alternative transformational interactions, as Paul Gunter explains:

It was the early [1970s] and most people had not had direct experience [with feminist critique], so in trainings we would have folks observe in various dialogues how many times men said what women had just said (as if it was their own original idea), talking not only about active listening but also how sexist it was and how it affected our communication—and having the large training group broken down into the smaller affinity groups really helped make this a growth experience for everyone, and taught empathy skills that we could use, not only internally, but also with those we would confront, public affairs officers, pro-nuke townspeople, police.<sup>34</sup>

Directly confronting oppression and prejudice operating within organizing structures not only transformed interpersonal interactions but also increased the movement’s overall effectiveness by encouraging participation of a diverse community, thereby helping build a broader-based people power movement.

Gunter relates the importance of a spectrum of training, from recommending specific ways to stay safe to how to make quick decisions:

[Learning] how to incorporate what you brought on-site with you to defend vs. police dogs—put packs on your back and sit in a tight circle to keep dogs from getting a grab on you—and sitting in close circles could help if police used horses—it’s not likely they would step on you if in a big clump...gave people some confidence to enter into the action, some sense of being prepared. Each AG

[affinity group, or small action team] had rotating responsibilities that included, and were used in quick decision-making exercises in training, [how] to isolate hecklers, not get involved with troublemakers, to deal internally with provocateurs, to have media talking points, [to] have a person with a medical kit.<sup>35</sup>

The consensus process had been so integrated into the campaign that it was effectively used when 1,414 protestors were arrested after occupying the proposed Seabrook power plant site on May 1, 1977. They were held in seven armories and jails for two weeks, lawyers carrying information between the groups. “There was even a New Hampshire Guard testimony where they said they were completely taken over by the civility of the opposition they faced. . . . Particularly in New Hampshire, the guards had never come across nonviolent protesters. . . . The trainings knit people together, gave us the cohesiveness to carry on through the incarceration. . . . By design, training helps to get through the consequences of action.”<sup>36</sup> The commitment to collective decision making and open process was not only practice for a future in which everyone’s voice would be valued, it also influenced subsequent nonviolent movements, most notably the Central American solidarity and economic justice movements of the 1980s and 1990s.

**Germany.** In West Germany, the construction of a proposed nuclear power plant was halted by a series of actions carried out between 1971 and 1977. After a massive demonstration of twenty thousand to thirty thousand people in February 1975, the site was continuously occupied for ten months and supported by the founding of an on-site “people’s university.” More than sixty courses were offered in such topics as environmental protection, nuclear energy (pro and con), civil democracy, strategic thinking, and the legal right to protest. Although large-scale occupation of the site ended in late 1975, when a panel of judges was established to rule on the proposed nuclear power generator there, the ruling against the plant did not occur until 1977.<sup>37</sup>

A large-scale NVA training of three hundred activists in 1974 supported a preceding sister campaign across the Rhine in Marckolsheim, France, against a lead factory. Eric Bachman, one of the NVA trainers on the ground at the time, notes that although NVA groups were in many parts of Germany by 1973–74, NVA training was not common. In addition, he says, “although the NVA training did not directly reach the masses of twenty to thirty thousand who took part in the occupation, it did reach the movers and shakers, and certainly had an effect that way. Organizers would ask people, ‘Even if you don’t believe in nonviolence, for this action we want you to be nonviolent.’” This approach, he explains, was generally successful because the local residents were committed to avoiding violence in their home areas and therefore supported the nonviolent tactics.<sup>38</sup>

When the Marckolsheim lead factory permit was withdrawn in 1975, the protesters were free to cross the river and join the occupation at Wyhl. Later courses in the people’s university were a resource for other activist groups in Germany, France, and beyond, including those in the growing anti-nuclear weapons movement.<sup>39</sup>

The NVA training sessions were effective in helping prepare those risking arrest and in building working affinity groups that could handle the site occupation, in both the United States and Germany. The safety of protesters was enhanced because the authorities trusted their adherence to NVA discipline. The concerns of New Hampshire authorities were allayed at Seabrook because of the NVA training, enabling close to eight thousand protesters (all trained) to remain overnight for three days. Although one of the two proposed nuclear reactors did go online at Seabrook, the Clamshell Alliance is widely credited with bringing the issue of nuclear power “into the public square,” defending local democracy, and halting new nuclear power plant construction in the United States after 1977.<sup>40</sup>

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### ***Otpor! Anti-Dictatorship Movement***

In two short years, the Serbian civil protest group Otpor! (Resistance!) grew from a handful of students into an eighty-thousand-person movement that was instrumental in overthrowing Slobodan Milošević's government and helping the country's transition to a democracy.<sup>41</sup>

Training was one of the keys to the explosive growth of Otpor! and the effectiveness of its strategies. Organizers recognized that they could harness training as a way to develop leaders, build membership, and brainstorm tactics.<sup>42</sup> Training sessions were facilitated by the main organizers from within Otpor! rather than by outsiders, which lent credibility to the organization. As Ivan Marović, a founding Otpor! student leader, explains,

In the beginning, the leadership of Otpor! was doing the training of the new recruits, building a second tier, to establish the visibility and influence that you need as a leader. And instead of telling people what to do, we gave them skills for what they needed...and then they would get to be [the] leadership when they trained the next batch of recruits. In this way training was incorporated into the movement strategy to grow—and the trainings included a product-orientated approach.<sup>43</sup>

The product was an action at the end of the training using tactics that the recruits themselves had developed. Having the training sessions facilitated by insiders ensured that the training would reflect the Otpor! culture, which encouraged creativity, satirical actions, and sharing information on a need-to-know basis. Because Otpor! culture strongly discouraged bragging or gratuitous chatter about action plans, anyone who engaged in this behavior was easily identified as an outsider, which had the effect of increasing trust, and therefore security, among those who honored the insider culture.

All new recruits were required to go through an intensive five-day training process. This process was associated with a rapid growth rate and high retention of recruits, who were quickly deployed and made useful in the movement. The slogan Act, Recruit, Train (ART) reflects this efficient model and helped the activists avoid “newcomer-itis.” Early Otpor! research into how to retain interested people showed that attending meetings as a novice discouraged recruitment. Starting with a training element that built a cohort, which would then be involved in an action within the first week, meant that participants went to their first meeting with a street action already under their belt.<sup>44</sup>

Otpor! also relied on a do-gooder multilevel marketing approach, whereby each new recruit found others to join and be trained. Multilevel marketing depends on a personal relationship to sell, or in this case to recruit the individual, rather than on the product or campaign selling itself. Marović credits this adaptation of multilevel marketing with allowing Otpor! to penetrate sectors of society that had not been reached before. This was particularly important for expanding the coalition beyond the youth sector.

Marović was part of a team that trained a few hundred people in the initial expansion phase; many of them became trainers themselves and advanced the ART model within the progressive multilevel marketing structure. As the cohort of trainers grew, Otpor! developed a manual to support trainers because they couldn't manage the level of mentoring and support demanded by the numbers involved. Growth also meant that it was difficult (eventually impossible) to vet new members; after Milošević was ousted, the training program was ended.

The five-day training sessions took place in the evenings, Monday through Friday, and included an action on the weekend at the end of the session. Generally, recruits in groups of fifteen to twenty were clustered geographically by town, neighborhood, or university for the series. At the end of this process, participants had a complete set of organizing, media, design, and planning skills as well as action experience. An unintentional outcome of this

effective training program was that when Otpor! folded, these well-trained organizers were in high demand and recruited by other groups. However, according to Marović,

all these trainings created a group of very self-confident people, and when Milošević was gone, they felt because they were doing things on their own, they could do what they wanted—it was difficult to keep them in line—it's one reason Otpor! fell apart after that.... Of course, [it was] not the main reason, that was simply because we, Otpor!, didn't prepare for after—but having all these self-confident, competent, tough folks with completely divergent ideas, who were not used to waiting for leadership to tell them what to do, didn't help.<sup>45</sup>

Otpor! had expanded rapidly. According to Marović, training the first year reached around a thousand people; after six months, twenty thousand; and within two years, eighty thousand. With such exponential growth, in the last couple months before Milošević stepped down, about forty thousand new recruits did not get trained. This could have harmed Otpor! had this phase of the struggle continued much longer. However, because so many recruits had been trained, the more seasoned activists were critical during the period of exponential growth in passing on movement knowledge. Before systems could break down, Milošević was gone, and Otpor! was on to the next phase of the campaign.

## Limitations of Education and Training

Clearly, education and training can profoundly support a social movement and help ensure its success. When used as intentional components of a strategic plan, they can contribute to significant results. They have certain limitations, however, and by themselves do not guarantee a successful campaign.

Education and training can also become a diversion if they are not linked to strategic goals. Identifying specific goals and objectives will help ensure that the right people are in the room and the most useful skills are being developed. Otpor! identified specific topics and tasked specific individuals for its weeklong training sessions, which increased the movement's effectiveness.

Investing in trainers and facilitators through specialized training and mentorship is also important. Untrained, inexperienced facilitators can teach in inappropriate ways or use tools incorrectly and, in so doing, set a group back. The choice of outside professional trainers or internal trainers is critical. Developing trainers within an organization can move it ahead quickly but may also foster cliques or a professional class within the movement that might perpetuate nontransformational dynamics and prove counterproductive to the movement. During the Yellow Revolution in the Philippines, outside facilitators invited into the movement's training sessions worked within the context of the Church's authority and the movement's respect for that institution.

In designing training, it is important to be aware of the potential for dishonesty toward or manipulation of those undergoing the training. The leadership position of trainers ethically requires transparency regarding the purpose and goals of the training, theories of change, and the assumptions that underlie the workshops. Novice participants may not be prepared to assess situations and missions that are not transparent. The first step in the Otpor! training protocol was to clearly and directly communicate the organization's theory of change and the movement's vision. For some, that may be manipulative or dogmatic. Therefore, if the goals, the vision, did not mesh with potential participants' interests, they were asked to find a different group to work with.

***Education and training can also become a diversion if they are not linked to strategic goals.***

In addition, differences of opinion and cleavages can emerge around consensus-based decision making. Trainings and workshops helped foster environments where consensus could be used, but if people felt that a consensus process was bypassed, rifts and dissent within the group usually followed. Sometimes this happened because of time constraints or geography, sometimes because of power issues. Other issues and behaviors that surfaced in meetings and trainings required professional skills to address (mental health issues, significant behavior problems, former injuries, or PTSD) and the community did not usually have access to that assistance—which, when not addressed, undermined the effectiveness of training and preparation.

Disagreement around the role and acceptability of property destruction is also common, and a reason groups splinter into camps: those who accept property destruction within a nonviolent campaign and those who do not. For many, particularly outside the United States, property can represent the accumulated violence of the system or be a strong symbol of the system. Outside of capitalist and strongly individualistic societies, property is far less revered and assaults on property are viewed as distinct from any violence against persons.

Finally, education and training will deliver only on the content defined by the specific event. It is unreasonable to expect that training in such matters as outreach and public relations will produce people with core skills in another area, such as leadership. On the other hand, education and training protocols may be deliberately designed to reach beyond the immediate event. In the U.S. civil rights struggle, for example, delivering voter registration and literacy programs within a political context inspired political activism that reached well beyond simply voting in elections.

## Education, Training, and Social Change

The historical examples of NVA undertaken to achieve social change suggest five general and actionable strategic functions of education and training.

### 1. Facilitate personal preparation and behavior change.

Initial encounters with movements are often via teach-ins or educational forums that provide enough information for an individual to decide to join a group. The overall strategic value of such introductory educational sessions lies in increasing the number of participants and creating a support mechanism for individuals to take NVA.

Personal preparation includes consciousness-raising and empowerment. Thus the knowledge and tools imparted by the trainers must be matched by the recruit's realization of having the power to effect change on the specific issue at hand, agreement with the guiding theory of change, and an understanding of how to proceed. Training as part of the U.S. civil rights movement not only supported adherence to nonviolent discipline, but also helped participants maintain the moral high ground and led to protester behavior that reduced overall the retaliation violence of authorities and onlookers.

Specific training sessions can be tailored to managing fear and to understanding risks and consequences while continuing to adhere to the principles of NVA. The shared experience of training strengthens preparedness as the individual becomes aware of a strong network of support. Training sessions also provide both a space for activists to meet fellow collaborators and opportunities to become aware of and practice the transformative behavior needed to break through oppressive cultural norms that limit organization growth. In the Philippines, expanded citizen involvement came about because the use of the teachings of the Church provided greater acceptance for NVA.

*The knowledge and tools imparted by the trainers must be matched by the recruit's realization of having the power to effect change on the specific issue at hand, agreement with the guiding theory of change, and an understanding of how to proceed.*

## **2. Build organization and group cohesion, leadership, and capacity.**

Training helps build unity of purpose within groups, increases transparency in regard to the group's means and goals, and supports resiliency and flexibility, which are indicators of sustainability of the community over time. Some workshops build specific leadership, facilitation, organization, and media skills. Other workshops may be used to develop cultural competency, skills in decision processes, and anti-oppression techniques. Such capacity building encourages a level playing field and competent working or affinity groups that help distribute power internally. The original Otpor! team specifically used trainings not only to pass on vital information and build capacity for media, action planning, and outreach through a week-long training course of short workshops, but also to enable teams to respond flexibly and build leadership capacity internally.

External benefits are found when training sessions are intentionally used to build a base, create a coalition, or forge alliances with experts, trainers, and others outside the usual community. In almost all cases, the trainings awakened and motivated new sectors of the population to join the movement. The trainings developed trainers and participants who went on to populate, lead, and train other activists across diverse issue campaigns.

## **3. Aid strategic planning and improve strategies and tactics.**

Collective analysis of issues and the political environment is key to developing a shared vision and theory of change, innovative activities, and effective sequencing. Training and education sessions that include active planning help participants define and understand the political situation, analyze power differentials, and strengthen strategic decisions about when and how to turn to the spectrum of tactical methods of protest, noncooperation, intervention, and prefigurative and constructive work. Planning supports effective campaigns and movements by reserving time for reflection, debriefing, and evaluation, as well as improving these tools and procedures and the likelihood that they will affect future work.

For the Filipino Yellow Revolution, a focus on specific skills around election monitoring was particularly important for that context. The intentional contact with and sympathy for the police and military forces ultimately encouraged defections, and when some soldiers then defected, well-organized nonviolent activists were able to protect them. Across the case studies, one can also see that the safety of the protesters was enhanced because the authorities ultimately trusted their adherence to nonviolent discipline.

## **4. Increase capacity for, knowledge of, and adherence to NVA principles, skills, and tactics.**

The ability of the group or movement to adhere to nonviolent principles and tactics often depends on the accessibility of NVA education and training. Steadfast adherence to NVA is associated with a decrease in retaliatory violence. Adherence to NVA principles and tactics also significantly lowers the bar to participation, thereby opening up pathways for people to join the movement—which builds numbers, a key indicator of growing movement power. Conversely, the adoption of violent tactics raises the bar to participation and decreases the pool of potential members.

The anti-nuclear movements in the United States and Germany leveraged their commitments to NVA to push their campaigns' effectiveness. In Germany, locals—both activists and those not part of the movement—generally supported

*The ability of the group or movement to adhere to nonviolent principles and tactics often depends on the accessibility of NVA education and training.*

NVA, recognizing the lower cost to their communities relative to violent tactics; in New Hampshire, activists even managed to parlay mandatory NVA training into a state-sanctioned occupation of the nuclear power plant construction site.

Training workshops may be specifically designed to increase activists' capacity to use a variety of NVA skills. Targeted skills may include social media use, communication tools, formation of affinity groups, consensus building, scouting, strategic planning, research, recruitment, or providing legal support. Planning sessions also help activists determine appropriate tactics and identify the stage in a campaign when and where a tactic could be most effectively deployed.

#### **5. Rehearse, evaluate, and improve the execution of strategic plans.**

Role-playing of various kinds is a constant of NVA workshops. Role-playing allows rapid development and troubleshooting of logistics. The sessions may be designed to practice escalation and de-escalation tactics in a confrontation scenario, to try out peacekeeping tactics (in response to both internal and external provocations), or to retain focus during a confrontational situation. Familiarity with the use of such tactics helps develop leaders' comfort under stress, and practicing them in a nonbinding setting gives the experience of decision making under stress. Practicing for possible eventualities helps participants develop courage and preparedness and move toward collaborative and team-building work. Training for American civil rights activists helped them strategize and prepare for specific actions, such as lunch counter sit-ins, marches, and even incarceration. The training was critical not only to develop the best tactics but also to support individuals in overcoming their fears and retaining strong self-discipline in resisting the temptation to respond to provocations or to fight back.

## **Conclusion**

A commitment to education and training is integral to the success of nonviolent civil resistance movements dedicated to social change. Approaches that enhance a movement's success include adherence to NVA discipline; unity of purpose of individuals and organizations; and active, strategic planning.<sup>46</sup> Less well recognized is the function of civil resistance education and training to help ensure that protesters are not engaged in activities for which they do not have skill sets and are not put in harm's way.

The lack of such recognition is attributable to various factors: the ad hoc and improvisatory nature of training, its context-specific nature, lack of documentation by movement insiders or historians, lack of appropriate instruments of evaluation, and occasionally the hiding of much behind-the-scenes preparation in movements presented as having sprung de novo from the streets and neighborhoods of resisters. Some of these factors can be readily addressed: modern technology has made documentation much easier, and internal awareness of the need for self-reflection and self-evaluation even in the midst of campaigns is stronger. Contemporary documentation also serves the critical function of helping prepare facilitators and trainers to step into their roles as well as the importance of good planning and transparency.

Despite the strategic effectiveness of NVA education and training, it cannot and will not eliminate the false accusation that NVA incites violence rather than promotes peace. What disciplined use of nonviolent tactics in fact does is dissemble the facade of peace and expose the violence inherent in a system or society.<sup>47</sup>

NVA encompasses a broad range of activities that are further distinguished by their differing goals, cultures, languages, and participants. Attention must be paid to the appropriate

adaptation of generic agendas or those developed in different contexts to the specific circumstances of use, a possible source of training inefficacy. The possible longer reach of NVA training, beyond the immediate campaign, creates social uplift and contributes to greater civic participation in matters affecting the population.

One of the subtexts of the effectiveness of trainings is the experiential nature of much of the process, the incorporation of rehearsal or practice time as an essential and legitimate component for successful outcomes. In this way, participatory and experiential training functions as both theory and practice of transformative campaigns. Because education and training are highly adaptable in both structure and content, effective and well-designed classes and training can enhance all of the key factors of movement success.

## Appendix: Case Study Matrix

### Type

- *Yellow Revolution*: anti-authoritarian
- *Anti-nuclear power*: environmental rights
- *Civil rights*: human rights
- *Otpor!*: anti-authoritarian

### Training

- *Yellow Revolution*
  - Dispersed rural community empowerment workshops
  - NVA for urban middle class
- *Anti-nuclear power*
  - Clamshell Alliance: mandatory six- to eight-hour Nonviolent Direct Action trainings
  - Affinity group formation and training
  - Educational classes as part of the peoples' university
- *Civil rights*
  - Citizenship school, literacy, and ethics
  - Civil disobedience
  - History and philosophy of nonviolence and NVA
  - Support workshops: overcoming fear, arrest, court, jail, and legal system
  - Consciousness raising
- *Otpor!*
  - Small group initiation trainings (fewer than twenty-five participants), leading to action with the cohort immediately following the five-day, 1.5+ hours-per-day workshops

### Methodology

- *Yellow Revolution*: dialogue, role-plays, prayer, lectures, strategy sessions, analytical sessions, study circles, lectures
- *Anti-nuclear power*: dialogue, role-plays, team building work, experiential and practice sessions, lectures
- *Civil rights*: dialogue, role-plays, group work, prayer and meditation, communal singing, study circles, sermons or lectures
- *Otpor!*: dialogue, role-plays, slide presentations, videos, group work, real-time action planning/event

## Stated purpose

- *Yellow Revolution*
  - Ensure discipline and effective tactics
  - Provide space or time for personal reflection
  - Teach the history and capacity of nonviolent resistance strategies and techniques
  - Use teachings of the Church to move acceptance of NVA
  - Specific skills in election monitoring (1986)
  - Ensure easy access for mass participation in training and education
- *Anti-nuclear power*
  - Educate on history, philosophy, and principles of NVA and build commitment for using nonviolent action
  - Prepare and rehearse for specific scenarios (marches, occupations, incarceration, nonviolent responses in confrontation)
  - Build community of support and trust to form affinity groups
  - Address oppressive behaviors that cost the community and need to be transformed
  - Train and practice consensus decision making
  - Create safe space to address personal fears and feelings and reflect on personal motivation, confronting the power structure
  - Learn and practice quick decisions and group process
  - Practice for the media, marshal, and peacekeeper roles
  - Limit influence of outsiders and provocateurs
  - Develop strategies to focus attention on the problem of nuclear power and position the movement as operating with moral authority (rather than let the media focus on the violence or property destruction of protests)
- *Civil rights*
  - Build commitment to NVA as philosophy and strategy
  - Educate on NVA history and philosophy, civil disobedience techniques
  - Develop leadership
  - Build community and group decision-making capacity
  - Support individuals in overcoming fear
  - Strategize and prepare for specific actions: lunch counter sit-ins, marches, incarceration
  - Prepare to handle media
  - Build allies across black and white divisions
- *Otpor!*
  - Establish a leadership pipeline through training trainers
  - Eliminate “newcomer-itis” and create a direct pipeline to actions, not meetings
  - Develop geographically dispersed leaders and teams
  - Specific skill building: using the media, creative tools, organizing, dealing with repression and police, and others
  - Teach and use multilevel marketing techniques
  - Vet second-tier trainers and leaders
  - Brainstorm creative actions and execute one immediately following the training
  - Institutionalize opposition-Otpor! culture

## Planned outcomes

- *Yellow Revolution*
  - Training mobilized the middle class
  - Diversity of trainings contributed to the emergence of a widespread nonviolent movement
  - Trained organizers and activists, maintained nonviolent discipline

- Anti–nuclear power
  - Created a solid and committed base of affinity groups who maintained nonviolent discipline
  - Led to victories on local fights that had a national impact on nuclear power policy and plant siting for years to come
  - Used adhering to NVA guidelines as a negotiating strength when dealing with the state authorities; preemptively kept violent retaliation low in several instances, including a negotiated occupation of the Seabrook site by eight thousand people in 1978
- Civil rights
  - Built unity, mobilized masses of people, connected the campaigns across the nation
  - Supported adherence to nonviolent discipline, maintained moral high ground, and reduced overall retaliation violence
  - Weakened grip of fear and solidified resolve to act
  - Awakened and motivated new sectors of the population to join the movement
  - Led to major legislative victories and change of the status quo—Civil Rights Act of 1964 and Voting Rights Act of 1965
- Otpor!
  - Produced training manual to support trainers
  - Exponential growth of participants in movement
  - Leadership development
  - Proliferation of autonomous cells and creative actions dispersed across country
  - Adherence to nonviolent discipline in mass actions
  - Mass defections in state forces

#### Unintentional outcomes

- Yellow Revolution
  - Contact with and sympathy for police and military forces encouraged defections
  - Training guidelines allowed creativity and spontaneous actions to be effective within clear boundaries of NVA
  - Well-organized nonviolent activists were able to protect defecting soldiers
- Anti–nuclear power
  - Developed trainers and trained participants who went on to populate, lead, and train other activists across diverse issue campaigns
  - Success of the community occupation in Wyhl empowered Clamshell and others to adopt occupation as a strategy; Clamshell's use of affinity group structure and prioritizing training led German activists and others to adopt that model to fight nuclear weapons bases in Europe
- Civil rights
  - Developed trainers and trained participants who went on to populate, lead, and train other activists across diverse issue campaigns
  - Direct lineage of nonviolent action trainers from the civil rights movement to trainers for Vietnam War protests, anti-nuclear movement, and beyond
- Otpor!
  - Training manual developed into global training program in new organization, CANVAS
  - Contributed to activist base in future struggles; became the model for several similar youth movements around the world
  - Dispersed empowered leadership became uncontrollable
  - Model scaled up only to certain point, then growth became exponential and unmanageable; training system abandoned toward the end of the mobilization phase

## Perceived value

- Yellow Revolution: high
- Anti–nuclear power: high
- Civil rights: high
- Otpor!: high

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40. [http://clamshell-tvs.org/clamshell\\_history](http://clamshell-tvs.org/clamshell_history) "About Clamshell: Picnic Table Democracy," [www.clamshellalliance.net/about](http://www.clamshellalliance.net/about).
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43. *Ibid.*
44. Srdja Popović, Slobodan Djinović, Amdrej Milivojević, Hardy Merriman, and Ivan Marović, "CANVAS Core Curriculum: Guide to Effective Nonviolent Struggle" (Belgrade: Center for Applied Nonviolent Action and Strategies, 2007), [www.canvasopedia.org/project/canvas-core-curriculum/?](http://www.canvasopedia.org/project/canvas-core-curriculum/?).
45. Marović, interview, November 4, 2014.
46. Ackerman and DuVall, "People Power Primed."
47. As the Rev. Dr. Martin Luther King Jr. said so neatly in 1963, "We who in engage in nonviolent direct action are not the creators of tension. We merely bring to the surface the hidden tension that is already alive" ("Letter from a Birmingham Jail," April 16, 1963, [www.realcivilpolitics.com/articles/2015/01/19/letter\\_from\\_a\\_birmingham\\_jail\\_125300.html](http://www.realcivilpolitics.com/articles/2015/01/19/letter_from_a_birmingham_jail_125300.html)).

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