Just Readings

A Loyola University Chicago On-Line Social Justice Reader

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Chicago's Jesuit University

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Michael J. Maher and Daniel Hartnett, S.J.

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When we began this project, one of the questions we examined very closely was "Why?" This became extremely important when we looked at the variety of social justice readers that exist already. We looked back at what had originally inspired the idea. The two of us had worked together on a project in 2001, shortly after Loyola's School of Education adopted "Professionalism in the Service of Social Justice" as their conceptual framework. We put together an afternoon of reflection for the faculty. They were already very committed to social justice and had decades of experience working toward social justice through the fields of education and psychology. What was helpful for the faculty was the language of the social justice dialogues that exist in philosophy and theology. This language enabled faculty (and thereby students) to better articulate what it was they were already doing.

This reader is meant as a secondary text. If one is teaching a class specifically on the topic of social justice, it *might* be helpful, but other sources and readers would likely be better suited as the primary texts. It is our hope that this reader will be used in classes and activities were the primary purpose is *not* the in-depth discussion of social justice as a concept. For the professors teaching in psychology, literature, business, social work, theater, computer science, and all the fields here at Loyola, we *do* believe we have created a valuable resource for you if you want to incorporate social justice into your curriculum. Also, for the staff working in Student Affairs and University Ministry, and all the "extra-curricular" departments, when you want to engage in some social justice analysis of the service programs and other programs you conduct with students, we *do* believe we have created a valuable resource for you. By "secondary text" we mean secondary not only to other texts, but also to experiential learning.

The first section of the reader is really designed for faculty and staff. It provides ideas on how to incorporate social justice into instruction. The other sections provide foundational readings into social justice. We believe that these could be assigned to students to supplement their reading and other activities. Students could be asked to analyze problems from perspectives of different views of social justice. Students could

also be asked to evaluate how effective different perspectives on social justice are in understanding concrete situations.

We also believe that the reader will create another bridge between the university's mission and the university's academic life. The reader may help students in classes to see how their studies are tied to the Jesuit Catholic heritage of the university as well as the identity of the university as a home for all faiths. The reader may also help students in extra-curricular service programs to articulate their experiences in academic language that they can ring back into the classroom. By asking various faculty and staff within the university to write pieces or commentaries, we hope to identify for the university community at large some of the resources that exist here, further building bridges that can cross academic lines and program lines.

Finally, we believe that we have created a resource that is easy and accessible. Most strikingly, the reader is on the web with unlimited access and use. Faculty and staff do not have to wonder if they can impose upon students to buy another text before deciding if this can be included. The reader will also be updated from time to time, easily adding pieces and allowing contributors to update their writing. While the resource is designed with the Loyola University Chicago community in mind, it is accessible to students at other institutions, and we hope that fellow Jesuit institutions will find it helpful. Because the texts chosen are "foundational," we do believe that they are accessible and comprehensible to any university student. The reader is far from esoteric.

This reader does represent quite a bit of work donated by quite a few people within the university. We hope that it is a resource that will be used, and we invite our colleagues to do so.

Teaching Social Justice

Introduction by Michael J. Maher

This is an original piece written for *Just Readings* and was first posted on the Internet February 20, 2004.

This section is intended for faculty and staff, but some may find some of the readings here helpful for students. The focus of this section is "how to." The section begins with a discussion of the role of social justice in Jesuit education. It should be clear that social justice is not a fad or an optional element, but is a central and enduring aspect of Jesuit education. Next are four pieces that present different models of teaching social justice. It will be clear that these models contain many similarities, but central are the elements of concrete problems and analysis. Finally, the last piece is a guide to using further resources on the Internet in the teaching of social justice.

Social Justice and Jesuit Education: Jack O'Callaghan, S.J. on the Kolvenbach Santa Clara Address

Jack O'Callaghan, S.J.

Jack O'Callaghan, S.J. is a chaplain with the Pastoral Care Department of Loyola University Medical Center. This is an original piece written for *Just Readings* and was first posted on the Internet February 20, 2004.

The Commitment to Justice in Jesuit Higher Education: Reflections on its Origins and Implications

Introduction.   To Judas, complaining about waste of precious ointment, instead of selling it and giving the money to the poor, Jesus said: "The poor you have always with you...." Later, this became an expression of a social reality/awareness which perdured for many centuries in a society in which social class distinctions were simply: "*the way things are*." There were rich and poor, nobility and peasants, with only a slowing growing middle of merchants and artisans – and very little *social mobility*.

I. Ignatius Loyola, founder of the Jesuits, was born into this kind of social situation. He was a nobleman, but once turned away from vanity and self-seeking, he became very sensitive to the needs of the poor. Two of his men were stellar theologians at the Council of Trent, but he directed them to live and work in the local hospitals, when they weren't giving learned discourses at the Council. Ignatius and his early companions devoted a lot of time in Rome to begging money from the rich to feed the poor during frequent famines, and to nursing the plague-stricken. To this day every year the Mayor of Rome awards a chalice to the Superior General of the Jesuits, in a ceremony held on New Year's Eve to commemorate the lasting gratitude of the city of Rome for what those men did so long ago.

Ignatius gradually developed also some sense of the *social structures* the poor were caught in, and the need to develop counter-structures. He founded the House of St. Martha to rehabilitate former prostitutes. The idea was to help them break out of the cycle of vice they were caught in, and Ignatius persuaded society matrons to volunteer their time and money for these poor women. He stipulated that Jesuit schools were to be free of charge, and that cost-free hostels would be provided to house poor students who otherwise could not attend them. He saw these schools as ideally situated in big cities, to enable them to have as wide a ripple-effect as possible. And he set as one of the chief goals of Jesuit schooling to form young people in virtue and good citizen-ship. But he himself, and generations of his followers after him, were drawn from the ranks of the aristocracy and to some extent caught in the prevailing class-consciousness.

II. A Change of Awareness. By the mid-eighteenth century, there were strong stirrings against a taken-for-granted social hierarchy. The New World had become a refuge for oppressed people of all kinds: peasants and Puritans and people smarting against an iron clad class-society. In this new world they got a new sense of freedom and opportunity.

The American Revolution in 1776 was born out of this new sense: the truth, now declared "self-evident" that "*all men are created equal*"! The French Revolution in 1789 made the new consciousness even more explicit in its cry for "*Liberty, Equality, Fraternity*." This was something new, even to a Christianity which had always preached Charity, and at its best *practiced* charity towards the poor. (Most of the Saints of medieval Europe were noted for their care for the poor – but most of them were themselves not *from* the ranks of the poor, and very few were social reformers...).   Now what was becoming clear was that Christians (and all others, of course) were called also to JUSTICE – to "giving each his *due*, whatever that might mean.

In Jesuit Missions, the *Reductions* of Paraguay are the most dramatic example of this change. St. Peter Claver lived and died among the slaves on the ships in the port of Cartagena, Colombia, ministering to their needs and converting them to Christ. A martyr of charity. But the Jesuits who gathered the Indians of Paraguay and Brazil into fortified villages, taught them to read and to play music, and trained them in arms so that they could defend themselves against the Slavers who had preyed on them for years were intent on opposing huge injustices by creating *structures of justice* (even if the term would have been unknown to them).

III. Jesuit schools in this country were from the beginning places where immigrants were given an opportunity to be formed in virtue and good citizenship. Most began as "colleges" – European-style 6-year high schools. In Chicago, St. Ignatius College (1870) grew into Loyola University. For years, Loyola was a place where the majority of students were the first generation to be college-educated. But then, children of alumni came, to get the same education their fathers (men, in those days) had gotten.

So, many Jesuit Universities gradually grew to be middle-class, some fairly prestigious like Georgetown and all fairly expensive, since competitive education costs money! A few of our Universities have moved back toward their origins of serving the truly poor– e.g., the University of Detroit Mercy and Newark's St. Peter's College. But the realities of *survival* often make it impossible not to charge a tuition way above what truly poor people can hope to pay.

Loyola still serves a population from Chicago and other cities which is more diverse than many Jesuit university populations. We have a large majority of students getting important financial aid. But honestly, Loyola does not serve a large population of *truly poor people.* To begin with, most such people don't have the educational background which would enable them to pass our entrance requirements.

But here, as in other Jesuit schools, there is a new awareness of JUSTICE as an essential

component of Jesuit education. It's an awareness that has replaced the long-accepted wisdom of "educating leaders who will be enlightened. guides of society." That idea, theoretically appealing, ran into the *experience* (especially in Latin America) that such privileged leaders often simply perpetuated the structures of oppression which they inherited.

And so, in our day, the Jesuit Order has come to see that:

> The mission of the Society of Jesus today is the service of faith, of which the promotion of justice is an absolute requirement. . . . There is a new challenge to our apostolic mission in a world increasingly interdependent but, for all that, divided by injustice ...not only personal but institutionalized: built into economic, social and political structures that dominate the life of nations and the international community" [General Congregation 34, Decree.4, ## 48,52].

This and much more said by this chief legislative body of the Society of Jesus in 1975 was a very controversial statement. In subsequent years, many Jesuits in Latin America espoused a "Theology of Liberation" borrowed from a Marxist social analysis which, in some cases, seemed to downplay Faith and emphasize Justice in a way more political than theological. Thankfully, any imbalance was righted by the next General Congregation, the 33rd, in 1983. There, Justice was seen to be, not primarily *political* but a call of *the Gospel*, and essentially connected to Christian *love*. To really love our neighbor, the Congregations declared, meant working for Justice in concrete ways, including when appropriate the political process.

This new, more comprehensive emphasis was continued twelve years later by General Congregation 34 in 1995. That this was also a key factor for Jesuit universities was recognized clearly at Santa Clara University in October 2000, when representatives of all U.S. Jesuit Universities came together at the culmination of a year-long process of self-examination and discussion about the place of Justice in our education. The talk given there by Father Peter-Hans Kolvenbach, Superior General of the Jesuits, will bring its readers to the present moment in the Society of Jesus' commitment to Justice.

The Service of Faith and the Promotion of Justice in Jesuit Higher Education

Peter-Hans Kolvenbach, SJ

Rev. Peter-Hans Kolvenbach, SJ is the Superior General of the Society of Jesus. This Piece was given as a speech at Santa Clara University on October 6, 2000. It is reprinted here with the permission of Santa Clara University (www.scu.edu/news/attachments/kolvenbach_speech.html).

The twenty-eight Jesuit Colleges and Universities in the United States held a Conference on "Commitment to Justice in Jesuit Higher Education," at Santa Clara University (California), 5-8 October 2000, to mark the 25th anniversary of Decree 4 of the 32nd General Congregation of the Society of Jesus, and to reflect on its impact upon the Society's university apostolate in the United States. The 420 participants, among them many top administrators, endorsed Father General's address as the basis upon which to plan education for justice on every campus.

Introduction

This conference on the commitment to justice in American Jesuit higher education comes at an important moment in the rich history of the twenty-eight colleges and universities represented here this evening. We also join Santa Clara University in celebrating the 150th anniversary of its founding.

Just as significant as this moment in history, is our location. Santa Clara Valley, named after the mission at the heart of this campus, is known worldwide as "Silicon Valley," the home of the microchip. Surely when Father Nobili, the founder of this University, saw the dilapidated church and compound of the former Franciscan mission, he could never have imagined this valley as the center of a global technological revolution.

This juxtaposition of mission and microchip is emblematic of all the Jesuit schools. Originally founded to serve the educational and religious needs of poor immigrant populations, they have become highly sophisticated institutions of learning in the midst of global wealth, power and culture. The turn of the millennium finds them in all their diversity: they are larger, better equipped, more complex and professional than ever before, and also more concerned about their Catholic, Jesuit identity.

In the history of American Jesuit higher education, there is much to be grateful for, first to God and the Church, and surely to the many faculty, students, administrators and benefactors who have made it what it is today. But this conference brings you together from across the United States with guests from Jesuit universities elsewhere, not to congratulate one another, but for a strategic purpose. On behalf of the complex, professional and pluralistic institutions you represent, you are here to face a question as difficult as it is central: How can the Jesuit colleges and universities in the United States express faith-filled concern for justice in what they are as Christian academies of higher learning, in what their faculty do, and in what their students become?

As a contribution to your response, I would like to (I.) reflect with you on what faith and justice has meant for Jesuits since 1975 and then (II.) consider some concrete circumstances of today, (III.) to suggest what justice rooted in faith could mean in American Jesuit higher education and (IV.) conclude with an agenda for the first decade of the years 2000.

I. The Jesuit commitment to faith and justice, new in 1975

I begin by recalling another anniversary, which this conference commemorates. Twenty-five years ago, ten years after the closing of the Second Vatican Council, Jesuit delegates from around the world gathered at the 32nd General Congregation (GC), to consider how the Society of Jesus was responding to the deep transformation of all Church life that was called for and launched by Vatican II.

After much prayer and deliberation, the Congregation slowly realized that the entire Society of Jesus in all its many works was being invited by the Spirit of God to set out on a new direction. The overriding purpose of the Society of Jesus, namely "the service of faith," must also include "the promotion of justice." This new direction was not confined to those already working with the poor and marginalized in what was called "the social apostolate." Rather, this commitment was to be "a concern of our whole life and a dimension of all our apostolic endeavors."[1] So central to the mission of the entire Society was this union of faith and justice that it was to become the "integrating factor" of all the Society's works,[2] and in this light "great attention" was to be paid in evaluating every work, including educational institutions.[3]

I myself attended GC 32, representing the Province of the Near East where, for centuries, the apostolic activity of the Jesuits has concentrated on education in a famous university and some outstanding high schools. Of course some Jesuits worked in very poor villages, refugee camps or prisons, and some fought for the rights of workers, immigrants, and foreigners; but this was not always considered authentic, mainstream Jesuit work. In Beirut we were well aware that our medical school, staffed by very holy Jesuits, was producing, at least at that time, some of the most corrupt citizens in the city, but this was taken for granted. The social mood of the explosive Near East did not favor a struggle against sinful, unjust structures. The liberation of Palestine was the most important social issue. The Christian churches had committed themselves to many works of charity, but

involvement in the promotion of justice would have tainted them by association with leftist movements and political turmoil.

The situation I describe in the Near East was not exceptional in the worldwide Society at that time. I was not the only delegate who was ignorant of matters pertaining to justice and injustice. The 1971 Synod of Bishops had prophetically declared, "Action on behalf of justice and participation in the transformation of the world fully appear to us as a constitutive dimension of the preaching of the gospel, or, in other words, of the church's mission for the redemption of the human race and its liberation from every oppressive situation,"4 but few of us knew what this meant in our concrete circumstances.

Earlier, in 1966, Father Arrupe had pointed out to the Latin American Provincials how the socio-economic situation throughout the continent contradicted the Gospel, and "from this situation rises the moral obligation of the Society to rethink all its ministries and every form of its apostolates to see if they really offer a response to the urgent priorities which justice and social equity call for."5 Many of us failed to see the relevance of his message to our situation. But please note that Father Arrupe did not ask for the suppression of the apostolate of education in favor of social activity. On the contrary, he affirmed that "even an apostolate like education - at all levels - which is so sincerely wanted by the Society and whose importance is clear to the entire world, in its concrete forms today must be the object of reflection in the light of the demands of the social problem."6

Perhaps the incomprehension or reluctance of some of us delegates, was one reason why GC 32 finally took a radical stand. With a passion both inspiring and disconcerting, the General Congregation coined the formula, "the service of faith and the promotion of justice," and used it adroitly to push every Jesuit work and every individual Jesuit to make a choice, providing little leeway for the fainthearted. Many inside and outside the Society were outraged by the "promotion of justice." As Father Arrupe rightly perceived, his Jesuits were collectively entering upon a more severe way of the cross, which would surely entail misunderstandings and even opposition on the part of civil and ecclesiastical authorities, many good friends, and some of our own members. Today, twenty-five years later, this option has become integral to our Jesuit identity, to the awareness of our mission, and to our public image in both Church and society.7

The summary expression "the service of faith and the promotion of justice" has all the characteristics of a world-conquering slogan using a minimum of words to inspire a maximum of dynamic vision, but at the risk of ambiguity. Let us examine, first the service of faith, then the promotion of justice.

A. The service of faith

From our origins in 1540 the Society has been officially and solemnly charged with "the defense and the propagation of the faith." In 1975, the Congregation reaffirmed that, for us Jesuits, the defense and propagation of the faith is a matter of to be or not to be, even if the words themselves can change. Faithful to the Vatican Council, the Congregation

wanted our preaching and teaching not to proselytize, not to impose our religion on others, but rather to propose Jesus and his message of God's Kingdom in a spirit of love to everyone.

Just as the Vatican had abandoned the name "*Propaganda Fidei*", GC 32 passed from propagation to service of faith. In Decree 4, the Congregation did use the expression "the proclamation of faith," which I prefer.8 In the context of centuries of Jesuit spirituality, however, "the service of faith" cannot mean anything other than to bring the counter-cultural gift of Christ to our world.9 But why "the service of faith"? The Congregation itself answers this question by using the Greek expression "*diakonia fidei*."10 It refers to Christ the suffering Servant carrying out his "*diakonia*" in total service of his Father by laying down his life for the salvation of all. Thus, for a Jesuit, "not just any response to the needs of the men and women of today will do. The initiative must come from the Lord laboring in events and people here and now. God invites us to follow Christ in his labors, on his terms and in his way."11

I do not think we delegates at the 32nd Congregation were aware of the theological and ethical dimensions of Christ's mission of service. Greater attention to the "*diakonia fidei*" may have prevented some of the misunderstandings provoked by the phrase "the promotion of justice."

B. The promotion of justice

This expression is difficult to translate in many languages. We delegates were familiar with sales promotions in a department store or the promotion of friends or enemies to a higher rank or position; we were not familiar with the promotion of justice. To be fair, let us remember that a general congregation is not a scientific academy equipped to distinguish and to define, to clarify and to classify. In the face of radically new apostolic needs, it chose to inspire, to teach and even to prophesy. In its desire to be more incisive in the promotion of justice, the Congregation avoided traditional words like charity, mercy, or love, unfashionable words in 1975. Neither philanthropy nor even development would do. The Congregation instead used the word "promotion" with its connotation of a well-planned strategy to make the world just.

Since Saint Ignatius wanted love to be expressed not only in words but also in deeds, the Congregation committed the Society to the promotion of justice as a concrete, radical but proportionate response to an unjustly suffering world. Fostering the virtue of justice in people was not enough. Only a substantive justice can bring about the kinds of structural and attitudinal changes that are needed to uproot those sinful oppressive injustices that are a scandal against humanity and God.

This sort of justice requires an action-oriented commitment to the poor with a courageous personal option. In some ears the relatively mild expression, "promotion of justice," echoed revolutionary, subversive and even violent language. For example, the American State Department recently accused some Colombian Jesuits of being Marxist-inspired

founders of a guerilla organization. When challenged the U.S. government apologized for this mistake, which shows that some message did get through.

Just as in "*diakonia fidei*" the term faith is not specified, so in the "promotion of justice," the term justice also remains ambiguous. The 32nd Congregation would not have voted for Decree 4 if, on the one hand, socio-economic justice had been excluded or if, on the other hand, the justice of the Gospel had not been included. A stand in favor of social justice that was almost ideological, and simultaneously a strong option for "that justice of the Gospel which embodies God's love and saving mercy"12 were both indispensable. Refusing to clarify the relationship between the two, GC 32 maintained its radicality by simply juxtaposing "*diakonia fidei*" and "promotion of justice."

In other decrees of the same Congregation, when the two dimensions of the one mission of the Society were placed together, some delegates sought to achieve a more integrated expression by proposing amendments such as the service of faith through or in the promotion of justice. Such expressions might better render the 1971 Synod's identification of "action on behalf of justice and participation in the transformation of the world [as] a constitutive dimension of the preaching of the gospel."13 But one can understand the Congregation's fear that too neat or integrated an approach might weaken the prophetic appeal and water down the radical change in our mission.

In retrospect, this simple juxtaposition sometimes led to an "incomplete, slanted and unbalanced reading" of Decree 4,14 unilaterally emphasizing "one aspect of this mission to the detriment of the other,"15 treating faith and justice as alternative or even rival tracks of ministry. "Dogmatism or ideology sometimes led us to treat each other more as adversaries than as companions. The promotion of justice has sometimes been separated from its wellspring of faith."16

On the one side, the faith dimension was too often presumed and left implicit, as if our identity as Jesuits were enough. Some rushed headlong towards the promotion of justice without much analysis or reflection and with only occasional reference to the justice of the Gospel. They seemed to consign the service of faith to a dying past.

Those on the other side clung to a certain style of faith and Church. They gave the impression that God's grace had to do only with the next life, and that divine reconciliation entailed no practical obligation to set things right here on earth.

In this frank assessment I have used, not so much my own words but rather those of subsequent Congregations, so as to share with you the whole Society's remorse for whatever distortions or excesses occurred, and to demonstrate how, over the last twenty-five years, the Lord has patiently been teaching us to serve the faith that does justice in a more integral way.

C. The ministry of education

In the midst of radical statements and unilateral interpretations associated with Decree 4, many raised doubts about our maintaining large educational institutions. They insinuated, if they did not insist, that direct social work among the poor and involvement with their movements should take priority. Today, however, the value of the educational apostolate is generally recognized, being the sector occupying the greatest Jesuit manpower and resources, but only on condition that it transform its goals, contents, and methods.

Even before GC 32, Father Arrupe had already fleshed out the meaning of "*diakonia fidei*" for educational ministries when he told the 1973 International Congress of Jesuit Alumni of Europe: "Today our prime educational objective must be to form men for others; men who will live not for themselves but for God and his Christ - for the God-man who lived and died for all the world; men who cannot even conceive of love of God which does not include love for the least of their neighbors; men completely convinced that love of God which does not issue in justice for men is a farce."17 My predecessor's address was not well received by many alumni at the Valencia meeting, but the expression, "men and women for others," really helped the educational institutions of the Society to ask serious questions that led to their transformation.18

Father Ignacio Ellacuría, in his 1982 convocation address here at Santa Clara University, eloquently expressed his conviction in favor of the promotion of justice in the educational apostolate: "A Christian university must take into account the Gospel preference for the poor. This does not mean that only the poor study at the university; it does not mean that the university should abdicate its mission of academic excellence - excellence needed in order to solve complex social problems. It does mean that the university should be present intellectually where it is needed: to provide science for those who have no science; to provide skills for the unskilled; to be a voice for those who do not possess the academic qualifications to promote and legitimate their rights."19

In these two statements, we discover the same concern to go beyond a disincarnate spiritualism or a secular social activism, so as to renew the educational apostolate in word and in action at the service of the Church in a world of unbelief and of injustice. We should be very grateful for all that has been achieved in this apostolate, both faithful to the characteristics of 400 years of Ignatian education and open to the changing signs of the times. Today, one or two generations after Decree 4, we face a world that has an even greater need for the faith that does justice.

II. A "composition" of our time and place

The twenty-five year history we lived through and have briefly surveyed, brings us to the present. Ignatius of Loyola begins many meditations in his Spiritual Exercises with "a composition of place," an exercise of the imagination to situate prayerful contemplation in concrete human circumstances. Since this world is the arena of God's presence and activity, Ignatius believes that we can find God if we approach the world with generous faith and a discerning spirit.

Meeting in Silicon Valley brings to mind, not only the intersection of the mission and the microchip, but also the dynamism and even dominance that are characteristics of the United States at this time. Enormous talent and unprecedented prosperity are concentrated in this country, which spawns 64 new millionaires every day. This is the headquarters of the new economy that reaches around the globe and is transforming the basic fabric of business, work, and communications. Thousands of immigrants arrive from everywhere: entrepreneurs from Europe, high-tech professionals from South Asia who staff the service industries as well as workers from Latin America and Southeast Asia who do the physical labor - thus, a remarkable ethnic, cultural and class diversity.

At the same time the United States struggles with new social divisions aggravated by "the digital divide" between those with access to the world of technology and those left out. This rift, with its causes in class, racial and economic differences, has its root cause in chronic discrepancies in the quality of education. Here in Silicon Valley, for example, some of the world's premier research universities flourish alongside struggling public schools where Afro-American and immigrant students drop out in droves. Nation-wide, one child in every six is condemned to ignorance and poverty.

This valley, this nation and the whole world look very different from the way they looked twenty-five years ago. With the collapse of Communism and the end of the Cold War, national and even international politics have been eclipsed by a resurgent capitalism that faces no ideological rival. The European Union slowly pulls the continent's age-old rivals together into a community but also a fortress. The former "Second World" struggles to repair the human and environmental damage left behind by so-called socialist regimes. Industries are re-locating to poorer nations, not to distribute wealth and opportunity, but to exploit the relative advantage of low wages and lax environmental regulations. Many countries become yet poorer, especially where corruption and exploitation prevail over civil society and where violent conflict keeps erupting.

This composition of our time and place embraces six billion people with their faces young and old, some being born and others dying, some white and many brown and yellow and black.20 Each one a unique individual, they all aspire to live life, to use their talents, to support their families and care for their children and elders, to enjoy peace and security, and to make tomorrow better.

Thanks to science and technology, human society is able to solve problems such as feeding the hungry, sheltering the homeless, or developing more just conditions of life, but remains stubbornly unable to accomplish this. How can a booming economy, the most prosperous and global ever, still leave over half of humanity in poverty? GC 32 makes its own sober analysis and moral assessment: "We can no longer pretend that the inequalities and injustices of our world must be borne as part of the inevitable order of things. It is now quite apparent that they are the result of what man himself, man in his selfishness, has done ... Despite the opportunities offered by an ever more serviceable technology, we are simply not willing to pay the price of a more just and more humane society."21

Injustice is rooted in a spiritual problem, and its solution requires a spiritual conversion of each one's heart and a cultural conversion of our global society so that humankind, with all the powerful means at its disposal, might exercise the will to change the sinful structures afflicting our world. The yearly Human Development Report of the United Nations is a haunting challenge to look critically at basic conditions of life in the United States and the 175 other nations that share our one planet.22

Such is the world in all its complexity, with great global promises and countless tragic betrayals. Such is the world in which Jesuit institutions of higher education are called to serve faith and promote justice.

III. American Jesuit Higher Education for faith and justice

Within the complex time and place we are in, and in the light of the recent General Congregations, I want to spell out several ideal characteristics, as manifest in three complementary dimensions of Jesuit higher education: in who our students become, in what our faculty do, and in how our universities proceed. When I speak of ideals, some are easy to meet, others remain persistently challenging, but together they serve to orient our schools and, in the long run, to identify them. At the same time, the U.S. Provincials have recently established an important Higher Education Committee to propose criteria on the staffing, leadership and Jesuit sponsorship of our colleges and universities.23 May these criteria help to implement the ideal characteristics we now meditate on together.

A. *Formation and learning*

Today's predominant ideology reduces the human world to a global jungle whose primordial law is the survival of the fittest. Students who subscribe to this view want to be equipped with well-honed professional and technical skills in order to compete in the market and secure one of the relatively scarce fulfilling and lucrative jobs available. This is the success which many students (and parents!) expect.

All American universities, ours included, are under tremendous pressure to opt entirely for success in this sense. But what our students want - and deserve - includes but transcends this "worldly success" based on marketable skills. The real measure of our Jesuit universities lies in who our students become.

For four hundred and fifty years, Jesuit education has sought to educate "the whole person" intellectually and professionally, psychologically, morally and spiritually. But in the emerging global reality, with its great possibilities and deep contradictions, the whole person is different from the whole person of the Counter-Reformation, the Industrial Revolution, or the 20th Century. Tomorrow's "whole person" cannot be whole without an educated awareness of society and culture with which to contribute socially, generously, in the real world. Tomorrow's whole person must have, in brief, a well-educated solidarity.

We must therefore raise our Jesuit educational standard to "educate the whole person of solidarity for the real world." Solidarity is learned through "contact" rather than through "concepts," as the Holy Father said recently at an Italian university conference.24 When the heart is touched by direct experience, the mind may be challenged to change. Personal involvement with innocent suffering, with the injustice others suffer, is the catalyst for solidarity which then gives rise to intellectual inquiry and moral reflection.

Students, in the course of their formation, must let the gritty reality of this world into their lives, so they can learn to feel it, think about it critically, respond to its suffering and engage it constructively. They should learn to perceive, think, judge, choose and act for the rights of others, especially the disadvantaged and the oppressed. Campus ministry does much to foment such intelligent, responsible and active compassion, compassion that deserves the name solidarity.

Our universities also boast a splendid variety of in-service programs, outreach programs, insertion programs, off-campus contacts and hands-on courses. These should not be too optional or peripheral, but at the core of every Jesuit university's program of studies.

Our students are involved in every sort of social action - tutoring drop-outs, demonstrating in Seattle, serving in soup kitchens, promoting pro-life, protesting against the School of the Americas - and we are proud of them for it. But the measure of Jesuit universities is not what our students do but who they become and the adult Christian responsibility they will exercise in future towards their neighbor and their world. For now, the activities they engage in, even with much good effect, are for their formation. This does not make the university a training camp for social activists. Rather, the students need close involvement with the poor and the marginal now, in order to learn about reality and become adults of solidarity in the future.

B. Research and teaching

If the measure and purpose of our universities lies in what the students become, then the faculty are at the heart of our universities. Their mission is tirelessly to seek the truth and to form each student into a whole person of solidarity who will take responsibility for the real world. What do they need in order to fulfill this essential vocation?

The faculty's "research, which must be rationally rigorous, firmly rooted in faith and open to dialogue with all people of good will,"25 not only obeys the canons of each discipline, but ultimately embraces human reality in order to help make the world a more fitting place for six billion of us to inhabit. I want to affirm that university knowledge is valuable for its own sake and at the same time is knowledge that must ask itself, "For whom? For what?"26

Usually we speak of professors in the plural, but what is at stake is more than the sum of so many individual commitments and efforts. It is a sustained interdisciplinary dialogue of research and reflection, a continuous pooling of expertise. The purpose is to assimilate experiences and insights according to their different disciplines in "a vision of knowledge

which, well aware of its limitations, is not satisfied with fragments but tries to integrate them into a true and wise synthesis"27 about the real world. Unfortunately many faculty still feel academically, humanly and I would say spiritually unprepared for such an exchange.

In some disciplines such as the life sciences, the social sciences, law, business, or medicine, the connections with "our time and place" may seem more obvious. These professors apply their disciplinary specialties to issues of justice and injustice in their research and teaching about health care, legal aid, public policy, and international relations. But every field or branch of knowledge has values to defend, with repercussions on the ethical level. Every discipline, beyond its necessary specialization, must engage with human society, human life, and the environment in appropriate ways, cultivating moral concern about how people ought to live together.

All professors, in spite of the cliché of the ivory tower, are in contact with the world. But no point of view is ever neutral or value-free. By preference, by option, our Jesuit point of view is that of the poor. So our professors' commitment to faith and justice entails a most significant shift in viewpoint and choice of values. Adopting the point of view of those who suffer injustice, our professors seek the truth and share their search and its results with our students. A legitimate question, even if it does not sound academic, is for each professor to ask, "When researching and teaching, where and with whom is my heart?" To expect our professors to make such an explicit option and speak about it is obviously not easy; it entails risks. But I do believe that this is what Jesuit educators have publicly stated, in Church and in society, to be our defining commitment.

To make sure that the real concerns of the poor find their place in research, faculty members need an organic collaboration with those in the Church and in society who work among and for the poor and actively seek justice. They should be involved together in all aspects: presence among the poor, designing the research, gathering the data, thinking through problems, planning and action, doing evaluation and theological reflection. In each Jesuit Province where our universities are found, the faculty's privileged working relationships should be with projects of the Jesuit social apostolate - on issues such as poverty and exclusion, housing, AIDS, ecology and Third World debt - and with the Jesuit Refugee Service helping refugees and forcibly displaced people.

Just as the students need the poor in order to learn, so the professors need partnerships with the social apostolate in order to research and teach and form. Such partnerships do not turn Jesuit universities into branch plants of social ministries or agencies of social change, as certain rhetoric of the past may have led some to fear, but are a verifiable pledge of the faculty's option and really help, as the colloquial expression goes, "to keep your feet to the fire!"

If the professors choose viewpoints incompatible with the justice of the Gospel and consider researching, teaching and learning to be separable from moral responsibility for their social repercussions, they are sending a message to their students. They are telling

them that they can pursue their careers and self-interest without reference to anyone "other" than themselves.

By contrast, when faculty do take up inter-disciplinary dialogue and socially-engaged research in partnership with social ministries, they are exemplifying and modeling knowledge which is service, and the students learn by imitating them as "masters of life and of moral commitment,"28 as the Holy Father said.

C. Our way of proceeding

If the measure of our universities is who the students become, and if the faculty are the heart of it all, then what is there left to say? It is perhaps the third topic, the character of our universities - how they proceed internally and how they impact on society - which is the most difficult.

We have already dwelt on the importance of formation and learning, of research and teaching. The social action that the students undertake, and the socially-relevant work that the professors do, are vitally important and necessary, but these do not add up to the full character of a Jesuit university; they neither exhaust its faith-justice commitment nor really fulfill its responsibilities to society.

What, then, constitutes this ideal character? and what contributes to the public's perception of it? In the case of a Jesuit university, this character must surely be the mission, which is defined by GC 32 and reaffirmed by GC 34: the *diakonia fidei* and the promotion of justice, as the characteristic Jesuit university way of proceeding and of serving socially.

In the words of GC 34, a Jesuit university must be faithful to both the noun "university" and to the adjective "Jesuit." To be a university requires dedication "to research, teaching and the various forms of service that correspond to its cultural mission." To be Jesuit "requires that the university act in harmony with the demands of the service of faith and promotion of justice found in Decree 4 of GC 32."29

The first way, historically, that our universities began living out their faith-justice commitment was through their admissions policies, affirmative action for minorities, and scholarships for disadvantaged students;30 and these continue to be effective means. An even more telling expression of the Jesuit university's nature is found in policies concerning hiring and tenure. As a university it is necessary to respect the established academic, professional and labor norms, but as Jesuit it is essential to go beyond them and find ways of attracting, hiring and promoting those who actively share the mission.

I believe that we have made considerable and laudable Jesuit efforts to go deeper and further: we have brought our Ignatian spirituality, our reflective capacities, some of our international resources, to bear. Good results are evident, for example, in the Decree "Jesuits and University Life" of the last General Congregation and in this very

Conference on "Commitment to Justice in Jesuit Higher Education"; and good results are hoped for from the Higher Education Committee working on Jesuit criteria.

Paraphrasing Ignacio Ellacuría, it is the nature of every University to be a social force, and it is the calling of a Jesuit university to take conscious responsibility for being such a force for faith and justice. Every Jesuit academy of higher learning is called to live in a social reality (as we saw in the "composition" of our time and place) and to live for that social reality, to shed university intelligence upon it and to use university influence to transform it.31 Thus Jesuit universities have stronger and different reasons, than many other academic and research institutions, for addressing the actual world as it unjustly exists and for helping to reshape it in the light of the Gospel.

IV. In conclusion, an agenda

The twenty-fifth anniversary of GC 32 is a motive for great thanksgiving.

We give thanks for our Jesuit university awareness of the world in its entirety and in its ultimate depth, created yet abused, sinful yet redeemed, and we take up our Jesuit university responsibility for human society that is so scandalously unjust, so complex to understand, and so hard to change. With the help of others and especially the poor, we want to play our role as students, as teachers and researchers, and as Jesuit university in society.

As Jesuit higher education, we embrace new ways of learning and being formed in the pursuit of adult solidarity; new methods of researching and teaching in an academic community of dialogue; and a new university way of practicing faith-justice in society.

As we assume our Jesuit university characteristics in the new century, we do so with seriousness and hope. For this very mission has produced martyrs who prove that "an institution of higher learning and research can become an instrument of justice in the name of the Gospel."32 But implementing Decree 4 is not something a Jesuit university accomplishes once and for all. It is rather an ideal to keep taking up and working at, a cluster of characteristics to keep exploring and implementing, a conversion to keep praying for.

In *Ex Corde Ecclesiae*, Pope John Paul II charges Catholic universities with a challenging agenda for teaching, research and service: "The dignity of human life, the promotion of justice for all, the quality of personal and family life, the protection of nature, the search for peace and political stability, a more just sharing in the world's resources, and a new economic and political order that will better serve the human community at a national and international level."33 These are both high ideals and concrete tasks. I encourage our Jesuit colleges and universities to take them up with critical understanding and deep conviction, with buoyant faith and much hope in the early years of the new century.

The beautiful words of GC 32 show us a long path to follow: "The way to faith and the way to justice are inseparable ways. It is up this undivided road, this steep road, that the

pilgrim Church" - the Society of Jesus, the Jesuit College and University - "must travel and toil. Faith and justice are undivided in the Gospel which teaches that 'faith makes its power felt through love.'34 They cannot therefore be divided in our purpose, our action, our life."35 For the greater glory of God.

Thank you very much.

6 October 2000

NOTES

1 GC32, D.4, n.47.

2 GC32, D.2, n.9.

3 See GC32, D.2, n.9 and D.4, n.76.

4 1971 Synod of Bishops, "Justice in the World."

5 Pedro Arrupe, S.J., "On the Social Apostolate in Latin America," December 1966 (AR 14, 791).

6 Ibid.

7 Cf. Peter-Hans Kolvenbach, S.J., "On the Social Apostolate," January 2000, n.3.

8 "Since evangelization is proclamation of that faith which is made operative in love of others (see Galatians 5:6; Ephesians 4:15), the promotion of justice is indispensable to it" (GC32, D.4, n.28).

9 Cf. GC34, D.26, n.5.

10 For example, GC32, D.11, n.13.

11 GC34, D. 26, n.8.

12 GC33, D.1, n.32.

13 1971 Synod of Bishops, "Justice in the World."

14 Pedro Arrupe, Rooted and Grounded in Love, 67 (AR XVIII, 500).

15 GC33, D.1, n.33.

16 GC34, D.3, n.2.

17 Pedro Arrupe, S.J., Address to the European Jesuit Alumni Congress, Valencia, August 1973, in Hombres para los demás, Barcelona: Diafora, 1983, p. 159.

18 Cf. The Characteristics of Jesuit Education, Washington, D.C.: Jesuit Secondary Education Association, 1987.

19 Ignacio Ellacuría, S.J., "The Task of a Christian University," Convocation address at the University of Santa Clara, 12 June 1982; "Una universidad para el pueblo," Diakonía 6:23 (1982), 81-88.

20 See "Contemplation on the Incarnation," Ignatius of Loyola, Spiritual Exercises, nn. 101-109.

21 GC32, D.4, nn.27, 20

22 United Nations Development Program, Human Development Report, 1990-present (annual).

23 In February 2000, the Jesuit Conference established a five-man Committee on Higher Education to prepare recommendations regarding 1) sponsorship by the Society of U.S. Jesuit colleges and universities; 2) assignment of personnel to these institutions; 3) selection of Presidents (particularly non-Jesuit Presidents) for these institutions.

24 John Paul II, Address to Catholic University of the Sacred Heart, Milan, 5 May 2000, n.9.

25 Ibid. n.7.

26 Cf. GC34, D.17, n.6.

27 John Paul II, op.cit., n.5.

28 John Paul II, Address to the Faculty of Medicine, Catholic University of the Sacred Heart, 26 June 1984.

29 GC34, D.17, nn.6,7.

30 "For the poor [the universities] serve as major channels for social advancement" (GC34, D.17, n.2).

31 "The University is a social reality and a social force, historically marked by what the society is like in which it lives, and destined as a social force to enlighten and transform that reality in which it lives and for which it should live" (Ellacuría, op.cit.).

32 Peter-Hans Kolvenbach, S.J., Address to the Congregation of Provincials (20 September 1990), AR 20 (1990), p. 452.

33 John Paul II, Ex Corde Ecclesiae, August 1990, n. 32.

34 Galatians 5:6.

35 GC32, D.2, n.8.

A Pedagogy of Justice

Daniel Hartnett, S.J.

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The fundamental proposition underlying Jesuit education is that faith, knowledge and service are intrinsically related. But what does this mean? It means that faith, knowledge and service are not three separate and completely independent aspects of education, accidentally or arbitrarily juxtaposed alongside each other. Rather, they form a triad in which each term is dynamically related to the others, and any one term is incomplete without the other two.

It's the integration of faith, knowledge and service that makes for true leadership.

The Society of Jesus has a long history of forming leaders. But at a recent conference held at Santa Clara University, Peter-Hans Kolvenbach, S.J., (the Superior General of the Society of Jesus) forcefully argued that the kind of leadership most needed in the world today is one that addresses the expanding situation of injustice and inequality.

Kolvenbach said that students graduating from Jesuit colleges and universities should possess three qualities. First, they need to have an authentic sensitivity to the social suffering in the world today. Next, they should have a deep understanding of the causes and conditions that perpetuate that suffering. Finally, they need a firm commitment to working for greater justice, preferably in and through one's own professional life.
How do we actually form this type of leader? Although books abound about leadership today, few focus thoughtfully on the formation of leaders for justice. They deal more commonly with matters of management than with issues of social change.

Nevertheless, over the past decade or so, new thoughts about justice have been tried and tested at nearly all of the 28 Jesuit colleges and universities in this country. While still in the experimental stage, a growing consensus points to the kinds of steps necessary to form true leaders for justice.

First Step: Experience

The appeal to experience as the starting point for all knowledge is not a novelty.

Aristotle promoted this idea, and it reappeared in a most powerful form during the period of the Enlightenment, especially in the writing of skeptics such as Hume. We also find a

strong concern for experience in the development of American pragmatism as represented by Pierce, James and Dewey. Although these thinkers spoke of experience in significantly different ways, they all agree that it is the touchstone for true knowledge. In the area of justice, the turn (or return) to experience has a narrative quality. It suggests that commitment to justice does not begin with abstract concepts or theories. It means real contact with those who suffer the effects of structural injustice. Basically, the first step toward justice begins with listening to narratives of injustice.

Of course, this contact occurs in a variety of ways. Some encounter poverty-stricken mothers unable to obtain decent health care for their children.

Others will listen carefully to the frustration and discouragement of homeless persons who are unable to find low-income housing in the city. Still, others become friends of teen-agers who, in a blind attempt to find the recognition they never found at home, fall into a lifestyle of gangs and drugs.

What is essential is that there be direct contact with the human face of injustice, a face that, to be sure, will probably expose us to real worlds of pain, but will also reveal the mystery of our common humanity.

No one claims that every single word spoken in these encounters is 100 percent accurate nor that listening to these stories of injustice is the only thing necessary. Indeed, to stop the process at this point would be to romanticize and to oversimplify the poor's suffering.

But it is also true that without this caring contact, without careful listening, justice will never be adequately achieved. The reason for this is quite simple: Justice is an affect, a basic moral sentiment, a matter of the heart. Primary justice is not so much a theoretical ideal but a basic feeling or sense of solidarity.

Plato and Aristotle knew that the most important element in moral education is not the transmission of moralistic bromides but the careful cultivation of relational virtues such as justice.

Second Step: Understanding

But it is not enough to empathize with victims of injustice. We need to understand the causes and conditions that perpetuate suffering. People become aware of this need only when they realize that society is not immediately transparent to itself.

Only by engaging in serious and sustained social analysis can we begin to uncover the social systems that are at work "behind the scenes." The challenge is to look beyond surface indicators, such as the Gross Domestic Product or the Dow Jones in order to see how our nation and the world are really doing. Without a critical "habitus" of reflection and without sustained social analysis, a person can never expect to become a significant leader in the pursuit of justice, but only an ideologue, heavy on rhetoric but weak on wisdom.

To engage in social analysis does not mean that everyone must become an expert sociologist, anthropologist or economist. "Social analysis" does not refer to a specialized, scientific understanding of social reality (what Aristotle refers to as "episteme"). Rather, it refers to the ordinary exercise whereby the educated adult remains critically attuned to what is happening in society in order to act more justly.

Aristotle refers to this kind of knowledge as "phronesis" or practical wisdom. This "phronetic" approach to understanding contributes to society's practical rationality in revealing where we are as a people, where we want to go, and how we might live more justly together.

Within this framework, we might rediscover the importance, indeed the urgent need, for research. Although we tend to reduce social justice to activism, such a reductionism is shortsighted and doesn't really serve the cause of justice.

When action for justice is based on a "thin" or superficial description of social reality, it often does more harm than good. Moreover, many of the major social issues that face the world community today are impervious to simple solutions.

Problems, such as global warming, the foreign debt, our chaotic health care system, etc., require more than volunteerism for their improvement. They require the kind of deep understanding that sound research provides.

Third Step: Imagination

Of course, it's important to understand the different social problems we face. But our grasp of social reality would be sorely inadequate were it to stop there.

Reality always consists of much more than a series of problems and needs. Reality must also be viewed in dynamic terms of possibility.

Martin Heidegger speaks about the "ontological priority" of possibility. Possibility is the secret heart of reality. There's nothing inevitable about an unjust situation. There are always new options and avenues available to us, however latent these may be. The exercise of imagination is not about developing grand utopian schemes. It means bringing to fruition those new seeds of justice already inchoately present in reality.

Though utterly essential to leadership for justice, the role of the imagination has been grossly underestimated. The imagination became stigmatized because it was considered to be of a lower order than reason. It was associated with flights of fantasy, perhaps useful for a novelist or science fiction writer, but not for someone seriously concerned with matters of social justice.

Gradually, however, we came to realize the terrible inadequacy of this outlook. Without social imagination, we have learned that justice will never flourish. When imagination is

absent, social structures tend to appear more permanent and over-determined than they are.

And there's a relationship between faith and the imagination. Faith is not so much a set of doctrines as it is a way of perceiving newness at work in history. Faith heals our moral nearsightedness and reveals the threads of grace that are present in the world. Faith enables us to perceive morally relevant features of a given situation that would otherwise go unnoticed. Faith perceives how the "mustard seed," the "good news," is already alive and active in our midst.

Fourth Step: Action

All the understanding and imagination in the world, however, would mean very little if it did not finally translate into new forms of communication and action.

And not any action counts for justice. Justice calls for actions that empower and transform, that liberate and heal. This is when we most need profiles of justice; that is, persons whom we can emulate or whose commitment to justice we can somehow imitate or reproduce.

Few of us would risk a new course of action in the area of justice were it not for the well-known witnesses to justice who have preceded us. These are such leaders as Dr. Martin Luther King Jr., Mahatma Gandhi, Thich Nhat Hanh, Dorothy Day, Abraham Heschel, Robert Kennedy, Mother Teresa and Oscar Romero. Each in their own true way reminds us that justice is possible and that, no matter how desperate a situation may at first appear, there is always room for creativity and transformation.

Each of these moral models was unafraid to challenge the world as it is. By so doing, each inspires a new vision, helps shape us morally and spurs us on to purposeful action. Perhaps most noteworthy, they first embrace the new path themselves.

If for 450 years Jesuit education has sought to form leaders by attending to the whole person (affectively, intellectually, morally and spiritually), this formation today has become intimately connected to the question of justice.

Tomorrow's "whole person" will only be in a position to exert true leadership if he or she possesses a well-educated solidarity. Leaders for justice might appear to be in short supply today, but rather than lament that fact, Jesuit colleges and universities, such as Loyola, creatively embrace that challenge.

A Learning Model for Values and Experience
Michael J. Maher

Michael Maher is a chaplain in the Department of University Ministry at Loyola University Chicago. The model discussed in this piece is also discussed by Michael Maher in *The Qualitative Report* (Volume 8, Number 1, www.nova.edu/ssss/QR/QR8-1/mahar.html) and in *The Journal of Experiential Education* (Volume 26, Number 2, Pages 88-96). This is an original piece written for *Just Readings* and was first posted on the Internet February 20, 2004.

Before I began working at Loyola University Chicago in 1996, I had worked in Missouri for seven years as a campus minister and as a parish director of religious education. I had also been a graduate student in the Department of Education of Saint Louis University for two years with Mike Grady as my mentor there. While working in Missouri, I had a few experiences of leading "alternative break immersions" for students over school breaks. Since coming to Loyola, I have had the opportunity to lead many such groups. Also since coming to Loyola, I have had the opportunity to teach some qualitative research methods classes in the School of Education. I followed under the strong influence of Professor Grady and SLU that research begins by identifying the values that underlie the research questions. In 1998, these roles converged when I began leading graduate student groups (and one School of Education faculty group) on service-learning trips to Cuba, which were also qualitative research methodology classes.

I began to really think about my instructional methods for both angles of this project, the service-and-reflection aspect emphasized in ministry immersions as well as the participant-observer aspect emphasized in qualitative research. I looked at what participants had told me about what was most effective, and I developed a model to explain it. I have titled the model "the Cognitive-Experiential Tri-Circle."
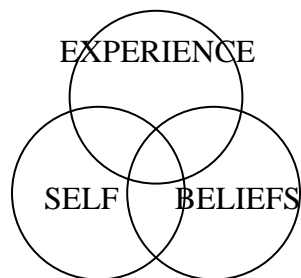
The purpose of the model is to describe the learning process which I believe is at the heart of this academic service-learning program. In the model, the circles are equally distant. They may pull closer together or push farther apart, but two cannot move in relationship to each other without affecting the third. If the participant ("self") goes more deeply into the field ("experience"), he or she will become more in tune with his or her

own beliefs ("beliefs"). If he or she reflects and becomes more in tune with his or her own beliefs, he or she will be drawn more deeply into the field. If the field and his or her own beliefs interact closely (move closer together) the participant will be drawn more deeply into both. The reverse is also possible; surface-level depth into the field will yield only surface-level reflection on beliefs, and surface-level reflection on beliefs will yield only surface-level depth into the field.

Armed with this new model of mine, I designed a new method of instruction spread out over the course of the immersion. I used the method with some programs in Cuba, one on the Texas/Mexico boarder, and one in the Pilsen neighborhood of Chicago. The method involved guided writing exercises with small-group discussion. The first step occurred before the trips, when participants were asked to reflect on what it was they hoped to learn about the local community they were visiting and what it was they hoped to learn about themselves. The second step stretched out over a few days at the beginning of trips and involved simply writing down a variety of questions they had (profound and mundane) about the community. Next, I asked them to look at those questions and reflect on why they had asked them, what was it about themselves that caused these questions to emerge, what did these questions say about their own values. After a few days, I asked them to look at those values and identify the underlying beliefs they held that gave them those values. Again, after a few days, I asked them to reflect on those beliefs, and identify their sources, where they came from. Finally, on the last day of the trips, I asked them to reflect on what they had learned about the local community and about themselves.

The thrust of the method was to continually connect the three elements of self, experience, and beliefs. Discussion and observation of the sites was not to be done without reflection on values and beliefs. Reflection on values and beliefs was never to be divorced from questions about the sites. I did some checking with participants, and the method proved to be successful. I also checked in with them about the model, and it appears to be functional and accurate.

Some of the participants did identify a problem with two of the labels. Can beliefs be separate from self? Also, can experience be separate from self? I have been thinking about these questions and about what I believe is the underlying project of this. I think that what it is I hoped to accomplish was to facilitate the learning of meaning. For my purposes, "meaning" means a certain type of knowledge that both helps to make understandable a wide variety of phenomena (a law) and that connects and includes the learner to the knowledge (belief). Armed with this, I am now considering the following labels for the model:
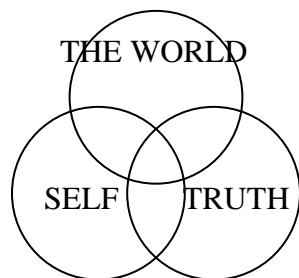
While "truth" is relative in that different people have different views of what is the truth, seekers of truth are generally prone to define "the truth" as an objective reality that they discover rather than create. Where belief exists, I believe, is in that intersect of the self with the truth. This is more than comprehending a set of information. Believing the truth is a type of knowing that implies a binding between the believer and the believed. The truth explains the believer to himself or herself. The believer is not truly free, once apprehending the truth, to stop believing it. When presented with another version of the truth that negates the present, the believer must choose between the two, but changing truth implies changing understanding of self, and this is ultimately changing self.

By "the world" I do mean the physical world. This is where I believe a Jesuit connection is made. One hallmark of Jesuit charism is "contemplatives in action" with an emphasis on *action*. I have to admit that my mystical side is not my strong suit. For me, the search for truth/meaning is very much bound up in this world. Most often, this is in interpersonal relationships and experiences. As a scholar, it is in the social sciences. I would argue, however, that any study of the physical world is also a search for truth/meaning. After all, the developments of astronomy, evolution, and genetics have been such hot issues over the centuries because they have shaped how we (humanity) view ourselves. In changing our view of ourselves, have we not also changed ourselves? Going from unique creatures standing at the center of the universe to being one of infinite possibilities all interrelated is clearly a big change.

In the end, I believe, learning meaning is about becoming.

Education and Liberation:
John Falcone on Paulo Freire

John Falcone, M.Div.

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Critical Pedagogy in the Tradition of Paulo Freire

Whether you are a student or a teacher, think back to the beginning of your college career: Why did you choose to get an education? To become well-rounded or well cultured? To fulfill your dreams and ambitions? Perhaps you wanted to become a strong and functional cog in the great professional-financial-industrial-burger-flipping juggernaut of the Global Economy. Perhaps you wanted to change the world.

Whether educator or student, you are at Loyola, reading this essay, for a reason. Paulo Freire's pedagogy – the theory and practice of education that he pioneered for social and political liberation – begins with students' reality: their concrete circumstances and choices, their limitations, and their vocation to transcend those limits.

Paulo Freire began his career as an educator, community organizer, and professor of grammar in the impoverished north-eastern region of Brazil. At first, he and his colleagues were stymied by blank looks and stubborn ignorance from the local illiterate peasants and laborers. Whether in English or Portuguese, "See Spot run" was less than motivating as adult education. Then he and his colleagues developed a highly successful literacy and continuing-education program, by inviting their impoverished students to interpret and investigate their immediate surroundings: first with pictures, film and audio, then through discussion, exploration, and the written word, into ever expanding circles of economic and political connections. Their program was interrupted in 1964, when a military junta took over Brazil and jailed Freire for his radical approach to education. He and his wife fled the country for a life of international activism. He worked for UNESCO and for agrarian education in Chile; he consulted at Harvard University and the World Council of Churches; once the coup was over, he even served for a time as Minister of Education in São Paulo, Brazil. The reason for his exile and his success was the new and trouble-making premise of his educational method: "One must begin to read the world before one is ready or willing to read the word."

The American social and educational setting may seem quite different from that of 1960's Brazil. Information technology, university scholarship and world-class ambitions seem to define our lives, not peasant culture, illiteracy and the economic back-water. Yet Freire's pedagogy is vitally important and appropriate in the United States. The continuing erosion of our economic base – the rise of the McJob, the slippage of the

American Dream, the seemingly intractable problems of inner city and rural blight – suggest that more and more Americans will face material struggle in the years to come. Love of learning and the zest of creative problem-solving withers in many of our overprogrammed K through Grad School classrooms, where the most important question often becomes, "Will that be on the test?" Could it be that student apathy and "information which has no relevance to my life" are *not* an inherent part of the human educational process?

Imagine a K through Grad School curriculum that included your immediate surroundings as the subject of rigorous, in-depth inquiry – your economic predicament, your relationships and sexuality, your spirituality, your music and your ideas about the world, analyzed through rigorous observation, discussion, and the written word. This dialogical pedagogy would include data and techniques to be mastered. The teacher must often introduce new concepts and information into the conversation, without which the "dialogue" could become stuck or turn to navel-gazing. The true rigor of this method lies in the teacher re-presenting, interrogating and investigating the subject matter *together with* her students.

Instead, knowledge is often seen as a huge set of "givens" – accept it and memorize it all. "Open your head and I'll make a deposit; take out your pen and I'll make a withdrawal." This "banking" or "informational" method of education – the greatest object of Freire's criticism – paradoxically supports a culture of silence and mystification. If the world appears as "given," poor, working and middle class people will not rise up to act for change. The owning classes are caught in a similar trap. They, too, may believe that the current Big Business economy and its assembly line educational programs are inevitable, "the best of all possible worlds." On the other hand, they may understand *exactly* what they are doing when they under-fund classrooms, support special interests, and run rough-shod over the environment and human rights – but they may be too frightened to give up the privileges that seem to define their very lives. The impetus to replace inquiry with information now dominates our textbook industry, our test-driven educational politics, and even our elite universities. All people are twisted by oppressive social structures.

A dialogical, "problem posing" educational method undermines the twin cultures of info-babble and silence. Many students and teachers will resist this pedagogy: we have all swallowed or "internalized" the banking model to some degree. Thus the critical teacher must also be strategic. He must "research" his students' reality as well as his subject matter. She must "read" her students' readiness; secure colleagues and institutional allies for her unusual approaches; turn blow-ups and failures into new problems to be posed. As our political and economic reality no longer seems so impenetrable, teachers and students, organizers and neighbors, pastors and congregations will gain the tools to deconstruct oppressive "givens" and re-construct a better world.

Excerpted below are sections of Freire's seminal *Pedagogy of the Oppressed*. They do not provide a "blue-print" for critical educational practice. They do suggest the components of a liberating teaching and leadership style: continuing "conversion" to the

oppressed; constant struggle against "banking" methods; careful research and preparation; genuine consultation with those who are taught and led. This methodology of "shared praxis" (dialogical reflection-and-action) has shaped many teachers and leaders: Jane Vella and bell hooks (adult and young people's education), Thomas Groome of Boston College (religious education) and Educators for Community Engagement (service-learning in higher education). Augusto Boal has developed a Theater of the Oppressed, where games, exercises and performance help people "read and re-write the world." Critical pedagogy has been part of Tennessee's Highlander Center (popular education and community organizing) and the Citizenship Schools movement of Septima Clark (civil rights). Freire's other books are also useful, especially *A Pedagogy for Liberation*, a dialogical book co-authored with Ira Shor, for its perspective on U.S. education.

> *Thanks to Victor Cole M.Ed., (vbcole67@hotmail.com) of TOP Lab (Theater of the Oppressed) New York for his dialogical insight and support in writing this article.*

Selections from
Freire's *Pedagogy of the Oppressed*

This translation was published by The Continuum International Publishing Group in 2000. It is reprinted here with permission of the publisher (www.continuumbooks.com).

Conversion, Oppression and Praxis
(pp. 61-62, 65, 69)

Conversion to the people requires a profound rebirth. Those who undergo it must take on a new form of existence; they can no longer remain as they were. Only through comradeship with the oppressed can converts understand their characteristic ways of living and behaving, which in diverse moments reflect the structure of domination. One of these characteristics is the … existential duality of the oppressed, who are at the same time themselves and the oppressor whose image they have internalized. Accordingly, until they concretely "discover" their oppressor and in turn their own consciousness, they nearly always express fatalistic attitudes toward their situation.

The peasant begins to get courage to overcome his dependence when he realizes that he is dependent. Until then, he goes along with the boss and says, "What can I do? I'm only a peasant." *(Words of a peasant during an interview with the author.)*

When superficially analyzed, this fatalism is sometimes interpreted as a docility that is a trait of national character. Fatalism in the guise of docility is the fruit of an historical and sociological situation, not an essential character of a people's behavior. It almost always is related to the power of destiny or fate or fortune – inevitable forces – or to a distorted view of God. Under the sway of magic and myth, the oppressed (especially peasants, who are almost submerged in nature) see their suffering, the fruit of exploitation, as the will of God – as if God were the creator of this "organized disorder."

> Submerged in reality, the oppressed cannot perceive clearly the "order" which serves the interests of the oppressors whose image they have internalized. Chafing under the restrictions of this order, they often manifest a type of horizontal violence, striking out at their comrades for the pettiest reasons.

…

On the other hand, at a certain point in their existential experience the oppressed feel an irresistible attraction towards the oppressors and their way of life. Sharing this way of life becomes an overpowering aspiration. In their alienation, the oppressed want at any cost to resemble the oppressors, to imitate them, to follow them. This phenomenon is especially prevalent in the middle-class oppressed, who yearn to be equal to the "eminent" men and women of the upper class.

…

It is only when the oppressed find the oppressor out and become involved in the organized struggle for their liberation that they begin to believe in themselves. This discovery cannot be purely intellectual but must involve action; nor can it be limited to mere activism, but must include serious reflection: only then will it be a praxis.

Critical and liberating dialogue, which presupposes action, must be carried on with the oppressed at whatever the stage of their struggle for liberation. (Not in the open, of course; that would only provoke the fury of the oppressor and lead to still greater repression.) The content of that dialogue can and should vary in accordance with historical conditions and the level at which the oppressed perceive reality. But to substitute monologue, slogans and communiqués for dialogue is to attempt to liberate the oppressed with the instruments of domestication. Attempting to liberate the oppressed without their reflective participation in the act of liberation is to treat them as objects which must be saved from a burning building; it is to lead them into the populist pitfall and transform them into masses which can be manipulated.

…

A revolutionary leadership must accordingly practice *co-intentional* education. Teachers and students (leadership and people), co-intent on reality, are both Subjects, not only in the task of unveiling that reality, and thereby coming to know it critically, but in the task of recreating that knowledge. As they attain this knowledge of reality through common reflection and action, they discover themselves as its permanent re-creators. In this way, the presence of the oppressed in the struggle for their liberation will be what it should be: not pseudo-participation, but committed involvement.

Education: "Banking" Method or Dialogue?
(pp. 71-72, 80-81)

Narration (with the teacher as narrator) leads the students to memorize mechanically the narrated content. Worse yet, it turns them into "containers," into "receptacles" to be "filled" by the teacher. The more completely she fills the receptacles, the better a teacher she is. The more meekly the receptacles permit themselves to be filled, the better the students are.

Education thus becomes an act of depositing, in which the students are the depositories and the teacher is the depositor. Instead of communicating, the teacher issues communiqués and makes deposits which the students patiently receive, memorize and repeat. This is the "banking" concept of education, in which the scope of action allowed to the students extends only as far as receiving, filing and storing the deposits. They do, it is true, have the opportunity to become collectors or cataloguers of the things they store. But in the last analysis it is the people themselves who are filed away, through the lack of creativity, transformation and knowledge in this (at best) misguided system. For apart from inquiry, apart from the praxis, individuals cannot be truly human. Knowledge emerges only through invention and re-invention, through the restless, impatient, continuing, hopeful inquiry human beings pursue in the world, with the world, and with each other.

…

The banking concept … distinguishes two stages in the action of the educator. During the first, he cognizes a cognizable object while he prepares his lessons in his study or his laboratory; during the second, he expounds to his students about that object. The students are not called upon to know, but to memorize the content narrated by the teacher. Nor do the students practice any act of cognition, since the object towards which

that act should be directed is the property of the teacher rather than a medium evoking the critical reflection of both teacher and students. Hence in the name of the "preservation of culture and knowledge" we have a system which achieves neither true knowledge nor true culture.

The problem-posing method does not dichotomize the activity of the teacher-student: she is not "cognitive" at one point and "narrative" at another. She is always "cognitive," whether preparing a project or engaging in dialogue with the students. He does not regard cognizable objects as his private property, but as the object of reflection by himself and the students. In this way, the problem-posing educator constantly re-forms his reflections in the reflection of the students. The students – no longer docile listeners – are now critical co-investigators in dialogue with the teacher. The teacher presents the material to the students for their consideration, and re-considers her earlier considerations as the students express their own. The role of the problem-posing educator is to create, together with the students, the conditions under which knowledge at the level of the *doxa* [appearance] is superseded by true knowledge, at the level of the *logos* [rational understanding].

A Pedagogy for Liberation: Generative Themes and Decoding
(pp. 96-97, 105-106, 109)

It is to the reality which mediates [human beings], and to the perception of that reality held by educators and people, that we must go to find the program content of education. The investigation of what I have termed the people's "thematic universe" – the complex of their "generative themes" – inaugurates the dialogue of education as the practice of freedom. The methodology of that investigation must likewise be dialogical, affording the opportunity both to discover generative themes and to stimulate people's awareness in regard to these themes. Consistent with the liberating purpose of dialogical education, the object of the investigation is not persons (as if they were anatomical fragments), but rather the thought-language with which men and women refer to reality, the levels at which they perceive that reality, and their view of the world, in which their generative themes are found.
…
In the event, however, that human beings perceive reality as dense, impenetrable, and enveloping, it is indispensable to proceed with the investigation by means of abstraction. … This dialectical movement of thought is exemplified perfectly in the analysis of a concrete existential, "coded" situation. (The encoding of an existential situation is the representation of that situation, showing some of its constituent elements in interaction. Decoding is the critical analysis of the coded situation) … If the decoding is well done, this movement of flux and reflux from the abstract to the concrete which occurs in the analysis of a coded situation leads to the supersedence of the abstraction *by* the critical perception of the concrete, which has already ceased to be a dense, impenetrable reality.

When an individual is presented with a coded existential situation (a sketch or photograph which leads by abstraction to the concreteness of existential reality), his tendency is to "split" that coded situation. In the process of decoding, this separation

corresponds to the stage we call the "description of the situation," and facilitates the discovery of the interaction among the parts of the disjoined whole. This whole (the coded situation), which previously had been only diffusely apprehended, begins to acquire meaning as thought flows back to it from the various dimensions. Since, however, the coding is the representation of an existential situation, the decoder tends to take the step from the representation to the very concrete situation in which and with which she finds herself. It is thus possible to explain conceptually why individuals begin to behave differently with regard to objective reality, once that reality has ceased to look like a blind alley and has taken on its true aspect: a challenge which human beings must meet.

In all the stages of decoding, people exteriorize their view of the world. And in the way they think about and face the world – fatalistically, dynamically, or statically – their generative themes may be found. A group which does not concretely express a generative thematics – a fact which might appear to imply the nonexistence of themes – is, on the contrary, suggesting a very dramatic theme: *the theme of silence*. The theme of silence suggests a structure of mutism in the face of the overwhelming force of the [oppressive] situations.

…

In contrast with the antidialogical and non-communicative "deposits" of the banking method of education, the program content of the problem-posing method – dialogical par excellence – is constituted and organized by the students' view of the world, where their own generative themes are found. The content thus constantly expands and renews itself. The task of a dialogical teacher in an interdisciplinary team working on the thematic universe revealed by their investigation is to "re-present" that universe to the people from who she or he first received it – and "re-present" it not as a lecture, but as a problem.

Investigating "Generative Themes": A Concrete Example
In the second chapter of Pedagogy of the Oppressed, Freire lays out one example of a campaign designed to engage local adults in their own education and liberation. The setting is Brazilian – in the countryside or the inner city – but the practices and values can inspire education in any context. Even when faced with much more limited resources and time, Freire suggests that the process of cooperative investigation and "thematization" described here can guide educational practice in powerfully transformative ways. This summary is drawn from pp. 110 – 124.

1) The investigators – educators, academicians, organizers – determine the area in which they will work
2) They familiarize themselves with the issues and challenges of the area through secondary sources
3) The investigators set up a preliminary meeting with area inhabitants to
   a. Explain the reasons for their presence
   b. Explain the educational project they wish to pursue
   c. Ask for mutual cooperation and respect

d. Solicit a number of volunteer "assistants" from the inhabitants, to be involved in every stage of the educational project

4) The investigations begin: "investigators" and "assistants" (the distinction soon becomes blurred) observe the area under investigation – work and play, people and spaces, language and idiom, etc., etc. The situation of the people becomes "an enormous, unique, living 'code' to be deciphered."

5) Investigators and assistants record their observations of particular "moments" with as much richness and detail as possible, preparing reports to share with the whole team.

6) The team meets after each observation, sharing their observations, sifting and sorting the reality of the people to identify the basic "contradictions" or challenges that inform the people's lives.

7) The team "re-encodes" these contradictions into images, passages or visual aids that are neither too explicit (propaganda) nor too enigmatic (puzzles) but fair *representations* of the reality of the people. These encodings should embody themes that "fan out" and relate to each other, presenting the people with a dynamic picture of the power relations in their "world."

8) The team returns to the people and sets up "thematic investigation circles" in which the people are invited to de-code the encodings and discuss them. The investigators listen to and challenge the participants, "posing as problems both the codified existential situation and their own answers."

9) The discussions are recorded and further analyzed by the investigators, "assistants" and additional volunteers drawn from the "investigation circles," creating an ever-broader set of critically conscious members within the community.

10) The team creates an in-depth educational experience. They engage their own and outside specialists to develop topic modules based on the themes that have arisen. Modules may include a brief essay, pictures, objects, music, skits, bibliography – whatever will help the people explore and learn more about their own themes. Additional themes which connect or elucidate the original themes may also be added, since learning is a dialogical process.

11) The topic modules include contextualizing introductions and discussions – Who are the experts? What do participants think of essays or photo-journalism? What is the usefulness of music, theater or books?

12) The original teacher / learner "investigators" and their "assistants" begin holding "basic-education" classes and "culture circles" with the people of the area, in which they present the learning modules and facilitate the discussions that arise.

"With all the didactic material prepared … the team of educators is ready to represent to the people their own thematics, in systematized and amplified form. The thematics which have come from the people return to them – not as contents to be deposited, but as problems to be solved." (p 123)

Revolutionary Teachers and Leaders
(182-183)

Revolutionary leaders commit many errors and miscalculations by not taking into account something so real as the people's view of the world: a view which explicitly and implicitly contains their concerns, their doubts, their hopes, their way of seeing the leaders, their perceptions of themselves and of the oppressors, their religious beliefs (almost always syncretic), their fatalism, their rebellious reactions. None of these elements can be seen separately, for in interaction all of them compose a totality. The oppressor is interested in knowing this totality only as an aid to his action of invasion in order to dominate or preserve domination. For the revolutionary leaders, the knowledge of this totality is indispensable to their action as cultural synthesis.

Cultural synthesis (precisely because it is a *synthesis*) does not mean that the objectives of revolutionary action should be limited by the aspirations expressed in the world view of the people. If this were to happen (in the guise of respect for that view), the revolutionary leaders would be passively bound to that vision. Neither invasion by the leaders of the people's worldview nor mere adaptation by the leaders to the (often naïve) aspirations of the people is acceptable.

To be concrete: if at a given historical moment the basic aspiration of the people goes no further than a demand for salary increases, the leaders can commit one of two errors. They can limit their action to stimulating this one demand or they can overrule this popular aspiration and substitute something more far-reaching – but something which has not yet come to the forefront of the people's attention. In the first case, the revolutionary leaders follow a line of adaptation to the people's demands. In the second place, by disrespecting the aspirations of the people, they fall into cultural invasion.

The solution lies in synthesis: the leaders must on the one hand identify with the people's demand for higher salaries, while on the other they must pose the meaning of that very demand as a problem. By dong this, the leaders pose as a problem a real, concrete, historical situation of which the salary demand is one dimension. It will thereby become clear that salary demands alone cannot comprise a definitive solution. The essence of this solution can be found in the … statement by bishops of the Third World that "if the workers do not somehow come to be owners of their own labor, all structural reforms will be ineffective … they [must] be owners, not sellers of their labor … [for] any purchase or sale of labor is a type of slavery."

To achieve critical consciousness of the facts that it is necessary to be the "owner of one's own labor," that labor "constitutes part of the human person," and that "a human being can neither be sold nor can he sell himself" is to go a step beyond the deception of palliative solutions. It is to engage in authentic transformation of reality in order, by humanizing that reality, to humanize women and men.

In the antidialogical theory of action, cultural invasion serves the ends of manipulation, which in turn serves the ends of conquest, and conquest ends in domination. Cultural synthesis serves the ends of organization; organization serves the ends of liberation.

This work deals with a very obvious truth: just as the oppressor, in order to oppress, needs a theory of oppressive action, so the oppressed, in order to become free, also need a theory of action.

The oppressor elaborates his theory of action without the people, for he stands against them. Nor can the people – as long as they are crushed and oppressed,

internalizing the image of the oppressor – construct by themselves the theory of their liberating action. Only in the encounter of the people with the revolutionary leaders [teachers] – in their communion, in their praxis – can this theory be built.

For further information, check out the following links:
Paulo Freire: (biography and bibliography) http://www.unomaha.edu/~pto/paulo.htm.
(reviews of published works)
http://fcis.oise.utoronto.ca/~daniel_schugurensky/freire/freirebooks.html
Dr. Jane Vella: (bibliography) http://www.globalearning.com/resources.htm.
bell hooks: (review, *Teaching to Transgress: Education as the Practice of Freedom*)
http://www.usm.maine.edu/~dlarson/hooks.htm
Thomas Groome: (shared praxis religious education)
http://www.ceo.parra.catholic.edu.au/re/introreparra/usescp.htm
Augusto Boal: http://www.unomaha.edu/~pto
Theater of the Oppressed: http://www.toplab.org
Service Learning: http://www.e4ce.org
The Highlander Center: http://www.hrec.org
Septima Clark and the Citizenship Schools:
http://www.citadel.edu/citadel/otherserv/hist/civilrights/papers/preskill.pdf

Social Analysis: Tool of Pastoral Action
Joe Holland & Peter Henriot, S.J.

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There can be two approaches to social analysis. Let's call one "academic" and the other "pastoral." The academic approach studies a particular social situation in a detached, fairly abstract manner, dissecting its elements for the purpose of understanding. The pastoral approach, on the other hand, looks at the reality from an involved, historically committed stance, discerning the situation for the purpose of action.

This "academic" vs. "pastoral" dichotomy is, of course, overdrawn in order to emphasize the differences. One can be "academic," in the sense of a scholarly pursuit of knowledge, yet at the same time be committed to social action. However, social analysis, as it is treated in this essay, is not simply an exercise in scholarship. Rather, it is analysis in the service of action for justice. It is an integral part of "the faith that does justice."

THE PASTORAL CIRCLE

A social analysis that is genuinely pastoral can be illustrated in what we can call the "pastoral circle." This circle represents the close relationships between four mediations of experience: (1) *insertion*, (2) *social analysis*, (3) *theological reflection*, and (4) *pastoral planning*.

THE PASTORAL CIRCLE
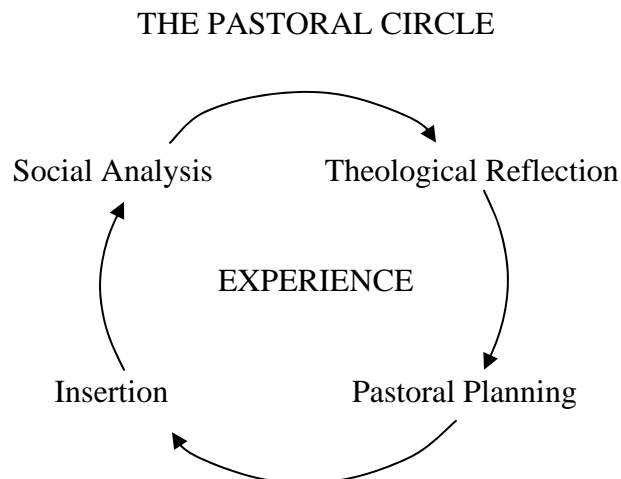
This circle is frequently referred to as the "circle of praxis," because it emphasizes the on-going relationship between reflection and action. (The concept of praxis has been developed by Paulo Freire in his classic, *The Pedagogy of the Oppressed*, New York:

Herder and Herder, 1970.) It is related to what has been called the "hermeneutic circle," or the method of interpretation that sees new questions continually raised to challenge older theories by the force of new situations. (This method is explored in Juan Luis Segundo's, *The Liberation of Theology*, Maryknoll, N.Y.: Orbis Books, 1976.)

The first moment in the pastoral circle--and the basis for any pastoral action--is *insertion*. This locates the geography of our pastoral responses in the lived experience of individuals and communities. What people are feeling, what they are undergoing, how they are responding--these are the experiences that constitute primary data. We gain access to these by inserting our approach close to the experiences of ordinary people.

These experiences must be understood in the richness of all their interrelationships. This is the task of *social analysis*, the second moment in the pastoral circle. Social analysis examines causes, probes consequences, delineates linkages, and identifies actors. It helps make sense of experiences by putting them into a broader picture and drawing the connections between them.

The third moment is *theological reflection*, an effort to understand more broadly and deeply the analyzed experience in the light of living faith, scripture, church social teaching, and the resources of tradition. The Word of God brought to bear upon the situation raises new questions, suggests new insights, and opens new responses.

Since the purpose of the pastoral circle is decision and action, the fourth moment in the circle is crucial: *pastoral planning*. In the light of experiences analyzed and reflected upon, what response is called for by individuals and by communities? How should the response be designed in order to be most effective not only in the short term but also in the long term?

A response of action in a particular situation brings about a situation of new experiences. These experiences in turn call for further mediation through insertion, analysis, reflection, and planning. Thus, the pastoral circle continues without final conclusion. It is, in fact, more of a "spiral" than a "circle." Each approach does not simply retrace old steps but breaks new grounds.

Key Questions

Before moving on, it is important to note that each of these moments in the pastoral circle should themselves be subjected to critical examination. When pastoral action on behalf of justice is the goal for which we are striving, then the following questions must be asked:
1. *Insertion*--Where and with whom are we locating ourselves as we begin our process? Whose experience is being considered? Are there groups that are "left out" when experience is discussed? Does the experience of the poor and oppressed have a privileged role to play in the process?
2. *Social Analysis*--Which analytical tradition is being followed? Are there presuppositions in these analyses that need to be tested? Is it possible to use a particular analysis without agreeing with its accompanying ideology?

3. *Theological reflection*—What methodological assumptions underlie the theological reflection? In what relationship does the social analysis stand to the theology--e.g., complementary subordinate, etc.? How closely linked is the theology to the existing social situation?

4. *Pastoral planning*--Who participates in the pastoral planning? What are the implications of the process used to determine appropriate responses? What is the relationship between groups who serve and those who are served?

We hope to elaborate on these questions throughout the study--opening the debate, but not claiming to give final answers.

Beyond Anecdotes

Our discussion of the pastoral circle will be recognized by many who are familiar with the "see/judge/act" trilogy of Canon Joseph Cardijn, the Belgian priest who, prior to World War 11, inspired Catholic social action groups such as the Young Christian Workers, Young Christian Students, and, indirectly, the Christian Family Movement. When Cardijn urged social activists to I "see," he called upon them to do more than simply *look* at the facts and figures of a particular situation. Beyond these facts and figures lies a framework that provides meaning, a perspective that makes sense of disparate elements. The search for this framework is the task of social analysis.

Effective pastoral planning necessarily involves this movement *from the anecdotal to the analytical*. We must move from issues-- e.g., the high cost of housing, job discrimination against non-whites, the decline of urban services, exclusion of women in decision-making posts, hunger in developing countries, etc.-- to explanations of why things are the way they are. To stop with anecdotes, to concentrate only on issues, obscures the comprehensive systemic picture. If the picture is obscured, one becomes trapped in immediate, *ad hoc* solutions.

Social problems and issues, although they may appear to be isolated pieces, are actually linked together in a larger system. Consider, for example, the huge woven tapestries that adorn the walls of many religious houses and. art museums. These tapes- tries-intricate mazes of thousands of connected threads-tell elaborate stories of saints, soldiers, and statesmen. If we were to step behind these old tapestries, we could see that the threads are woven back and forth, linking individual elements of the total picture. If someone were to pull at these threads, the various pieces of the picture would move in a variety of directions throughout the tapestry.

Social analysis attempts to provide a similar sense of the systemic unity of reality. Within the context of social analysis, facts and issues are no longer regarded as isolated problems. Rather, they are perceived as interrelated parts of a whole. Using social analysis, we can respond to that larger picture in a more systematic fashion. By dealing with the whole, rather than with detached parts, we are able to move beyond "issue orientation," or a primarily pragmatic approach, toward a holistic or systemic approach.

Calls for Analysis

The church has increasingly recognized that social analysis is important for effective pastoral planning. In his 1971 social document, "A Call to Action" (*Octogesima adveniens*), Pope Paul VI challenged social activists in a manner that recalls the elements of the pastoral circle:

> It is up to Christian communities to analyze with objectivity the situation which is proper to their own country, to shed on it the light of the Gospel's unalterable words, and to draw principles or reflections, norms of judgment, and directives of action from the social teaching of the Church [No. 41].

This call came into the life of one international religious community and was recorded in the 1975 documents of the 32nd General Congregation of the Society of Jesus. In its Decree Four, "Our Mission Today," the Jesuit mission is described as an integral approach to "the service of faith and the promotion of justice." In that mission, a serious effort must be made to understand the socioeconomic and political situation within which evangelization occurs. Hence:

> We cannot be excused from making the most rigorous possible political and social analysis of our situation. This will require the utilization of the various sciences, sacred and profane, and of the various disciplines, speculative and practical, and all of this demands intense and specialized studies. Nothing should excuse us, either, from undertaking a searching discernment into our situation from the pastoral and apostolic point of view. From analysis and discernment will come committed action; from the experience of action will come insight into how to proceed further [No. 44].

The call to analysis is further specified in this document with the help of several questions:

> The process of evaluation and discernment must be brought to bear principally on the following: the identification and analysis of the problems involved in the service of faith and the promotion of justice and the review and renewal of our apostolic commitments. Where do we live? Where do we work? How? With whom? What really is our involvement with, dependence on, or commitment to ideologies and power centers? [No. 74]

In the fall of 1977, representatives of the leadership of women's and men's religious congregations in the United States, Latin America, and Canada, met in Montreal. This Third Inter-American Conference of Religious issued a strong call-especially influenced by the Latin Americans-to commit religious to pastoral planning that incorporated both social analysis and theological reflection. The call was repeated in Cleveland in August

1978, at "CONVERGENCE '78"-the historic joint meeting of the Leadership Conference of Women Religious and the Conference of Major Superiors of Men. In their final statement, the religious superiors pledged:

> Realizing that we lack full understanding of our social, economic, and political life, we commit ourselves to structural analysis and theological reflection.

Since the Cleveland CONVERGENCE meeting, there have been numerous lectures, workshops, and seminars across the country to introduce leadership-lay, religious, and clerical-to the topic of social analysis in relation to pastoral planning.

Some people may fear that "social analysis" is simply another fad, the "in-thing" to do. However, it makes sense that church leadership should move toward a greater emphasis on social analysis in making pastoral decisions. Social analysis is simply an ex- tension of the principle of discernment, moving from the personal realm to the social realm. Just as the insights of psychology (psychoanalysis) have been incorporated into the process of personal discernment, the insights of the social sciences (social analysis) will assist the church in the process of corporate discernment, and ultimately, in the fulfillment of its apostolic mission.

Analysis and Theology

Let us recall once again the pastoral circle discussed at the be- ginning of this chapter. Social analysis is but one moment in that circle. While it is an indispensable step toward effective action on behalf of justice, it must be complemented by theological reflection and pastoral planning. None of these parts can be totally isolated; theology is not restricted to that moment explicitly called "theological reflection." In a wider sense, all the moments of the circle are part of an expanded definition of theology. All are linked and overlap.

Among various schools of social analysis today, there is much controversy concerning the fundamental assumptions of human sciences, their relation to human values, the nature and division of the distinct disciplines, etc. These controversies are the result of differing visions of the meaning, structure, and process of humanity's common life, struggle, and destiny. Thus, we can say that social analysis contains within itself, implicitly or explicitly, a theology of life. The theological process has already begun in what appears to be a secular analysis of society.

In this study, we will concentrate on social analysis, the second moment of the pastoral circle. Yet, we do so in a theological context-that is, one inspired by a faith commitment. For the present, however, we postpone more extended reflections on the third and fourth moments of the circle, namely, theological reflection and pastoral planning.

WHAT IS ANALYSIS?

Social analysis can be defined as the effort to obtain a more complete picture of a social situation by exploring its *historical and structural relationships*. Social analysis serves as a tool that permits us to grasp the reality with which we are dealing—"*la realidad*" so often referred to in Latin America.

Social analysis explores reality in a variety of dimensions. Sometimes it focuses on isolated *issues*, such as unemployment, inflation, or hunger. At other times, it focuses on the *policies* that address these issues, such as job training, monetary control, or food aid programs. Using social analysis, one might further investigate the broad *structures* of our economic, political, social, and cultural institutions, from whence such issues arise and to which policies are addressed.

Reaching beyond issues, policies, and structures, social analysis ultimately focuses on *systems*. There are many dimensions to these systems as well. We can speak of a social system's *economic* design as a distinct functional region or subsystem. We can analyze the *political* order of a system and its *cultural* foundation. Finally, we can analyze the social system in terms of *levels*--primary groups, local communities, nation-states, and even in terms of the world system.

The social system needs to be analyzed both in terms of time-- *historical* analysis--and space--*structural* analysis. Historical analysis is a study of the changes of a social system through time. Structural analysis provides a cross section of a system's frame- work in a given moment of time. A sense of both the historical and structural dimensions is necessary for a comprehensive analysis.

Finally, we can distinguish the *objective* and *subjective* dimensions of reality in our analysis. The objective dimension includes the various organizations, behavior patterns, and institutions that take on external structural expressions. The subjective dimension includes consciousness, values, and ideologies. These elements must be analyzed in order to understand the assumptions operative in any given social situation. The questions posed by social analysis unmask the underlying values that shape the perspectives and decisions of those acting within a given situation.

Although social analysis is used to "break down" social reality, that reality is considerably more complex than any picture painted by the analytic process. No social system ever fits a pure or ideal model. Capitalism, for example, exists in many forms, influenced by various cultural, geographic, and national experiences. The goal is not to fit reality into our preconceived analytical boxes, but to let our analysis be shaped by the richness of the reality.

The Limits of Social Analysis

As we begin to use social analysis as a pastoral tool, we need to be aware of its limits. While our cautions are rather obvious, it is helpful to articulate them. (We will return to this theme, the limits of analysis, at the end of the study.)

First, social analysis is not designed to provide an immediate answer to the question, what do we do? That is the task of strategy or planning. Social analysis unfolds the context within which a program for social change can be outlined, but does not provide a blueprint for action.

Social analysis is to social strategy what diagnosis is to treatment. Both analysis and diagnosis are necessary prerequisites to the cure of social and physical ills. However, they cannot them- selves provide that cure. After diagnosing a particular health problem, a doctor is able to describe the problem in a clear and complete fashion. However, treatment or therapy is another task. Similarly, very detailed analysis of a particular social situation will not provide programmatic answers. Social analysis offers broad parameters within which specific tactics and strategies can be suggested, but it does not formulate them.

This caution is important. As interest in social analysis increases among lay, religious, professional, and community organizations, there is a danger that the contributions of social analysis will be exaggerated. Regarding social analysis as a complex panacea, people may assume that the task can be accomplished only by "outside experts"-- individuals who are professionally skilled in the tools of social analysis. They might look to these professionals to provide all the answers. However, "experts" are useful only in so far as they expose the wider context of the situation and train local people in the use of analytical tools. Ultimately, it is the local people who must offer specific approaches to social problems and concrete steps toward their resolution. These people are the only ones who have experienced the particular situation; their expertise in designing solutions should always be respected.

Second, social analysis is not an esoteric activity for intellectuals. All of us use the tool every day in a variety of ways. We use it implicitly whenever we relate one specific event or issue to another, whenever we choose one course of action over another. The framework that makes those relationships and choices possible contains an implicit social analysis. More detailed social analysis makes that implicit analysis explicit and more precise.

Third, social analysis is not value-free. This point is extremely important. Social analysis is not a neutral approach, a purely "scientific" and "objective" view of reality. Of course, we should try to be clear, precise, reasoned, and logical. However, in our very choice of topics, in our manner of approach, in our questions, in our openness to the results of our analysis, we reveal our values and our biases. We never enter into an analysis without some prior commitment--implicit or explicit. That commitment colors our work and the work of others engaged in similar processes. For example, a person serving a community organization in a poor neighborhood in East St. Louis will move into social analysis with a different commitment from a person surveying the retail market future for a large department store in downtown St. Louis.

We will return later to the value dimension of social analysis. It is mentioned at the outset only to emphasize that social analysis in the service of pastoral planning requires a

distinctive set of values. In the very process of analysis itself, we need to wrestle with the biases of our consciousness, critiquing our deepest assumptions, exploring the new horizons that are opened for us.

Difficulties

If social analysis is so important, why is it so often ignored by people engaged in pastoral planning and action? Or, if not ignored, why does it seem to be so difficult? The answers can be found, in part, in the complexity of our society and its tendency toward change and controversy.

First, society in the United States is growing more and more complex. We have moved a long way from the simple and plain living of our ancestors. Our social system is now a bewildering maze of people, institutions, networks, bureaucracies, and machines. This complexity makes us feel almost powerless--even fatalistic. To attempt to analyze this complexity could make us feel even more confused. We fear that the more we study, the more bewildered we will become. Eventually, we will be unable to act at all. Dr. Martin Luther King, Jr. referred to this predicament as the "paralysis of analysis."

Second, social analysis is difficult because our society is constantly changing. Yesterday's analysis may not be valid today. Tomorrow's changes may undercut today's assumptions. The particular analysis we choose to help us interpret the new situation will, in turn, shape the remedy we ultimately find. It will determine whether we embark upon a creative, ineffective, or destructive social response. Given our continual state of change, we must constantly adapt our analysis to new situations, remaining open to critical evaluation. Above all, we must avoid dogmatism and the rigidity of fixed ideas.

Third, to enter into social analysis is to enter the realm of the controversial. The existence of controversy will make our task even more difficult. As noted earlier, social analysis is not value-free. We always choose an analysis that is implicitly linked to some ideological tradition. The claim to have no ideology is itself an ideological position! Locating ourselves within some vision of society--whether it be one of the many interpretations of capital- ism, socialism, feudalism, tribalism, etc.--we interact with various social and political movements, many of them fiercely antagonistic to each other.

The reluctance to move toward social analysis can be explained, in part, by this element of controversy. Behind our protests that social analysis is too difficult or irrelevant may be a fear that it is really too "radical." If we were to examine the institutions and processes of our society and of our church, would we not become continual questioners and doubters--driven to "radical" responses?

For these three reasons, then, analysis is a difficult task: it is complex, never ending, and always controversial. Given these obstacles, we might ask ourselves, why bother? Why is it really important? Because of our heritage of pragmatism, these reactions are instinctive for many people in the United States. Oriented to- ward "practicality" and the immediate attainment of goals, our culture is not conducive to analytical endeavors. Faced with

complexities, we want to charge ahead, implementing immediate, albeit *ad hoc*, solutions. The Anglo-American bias rejects the theoretical and the ideal in favor of the practical "workable" solution. We have a tendency to believe that theorizing is a luxury and that laborious analytical explorations are simply a waste of time. "Mission Impossible" was not only a popular television show; it is a mindset that we bring to bear on social challenges. To be asked to step back and look at the larger picture is a cultural challenge to the American tradition.

Our traditional U.S. heritage as a nation of problem solvers has generally served us well. The pragmatic gift has made rich contributions to our history. But, we are entering a fundamentally new era in U.S. history. In this era, pragmatic genius needs to be supplemented by a more thorough-going social analysis.

Opportunities and Limits

We are entering a difficult era. Prior to the 1970s, the United States was a land of continually expanding social opportunities. Today, however, the United States is becoming a land of decreasing opportunities. The predominant cultural theme underlying the expansionist era of our history was the "frontier." The new theme pressing on our consciousness today is the "limit" to our wealth and growth.

While the analysis of this new era varies, that a new era exists is widely accepted as fact. New political groups have emerged to face the challenge. First, people who claim to be in the political *Center* have stressed the necessity for a "new realism," suggesting that we are leaving an age of bounty and entering into one of austerity. This theme, developed by the so-called "neo-conservative" movement, has influenced some writers to attack what they call the "moralisms" of social liberals who, they claim, do not understand the new structural constraints of our social system. These voices are frank about the limits of the new situation--the need to conserve energy, to get along with less, to lower our expectations--but they are less harsh in their solutions than a second political group, the New Right.

The *New Right* is strategizing to become the leading social force in the new era. It realizes that the solutions of the political Center can no longer meet the challenges of society. "Austerity" is not an appealing theme for people who are losing their jobs! Consequently, the New Right has mounted an attack against "big government," advocating the restoration of a "*laissez-faire*" (unregulated) economy reminiscent of nineteenth-century capitalism. The responses of the New Right, if implemented, would bring about widespread suffering among the voiceless and power- less worldwide. Yet, this group has gained ground in the United States political arena, mainly because ordinary people don't know where to turn.

A third group is beginning to form on the political *Left*. This group suggests that the emerging limits to U.S. society will aggravate social conflict within the nation. The new Left claims that the restructuring of capitalism is compelling much of society to shoulder an unjust burden. This group argues that we must search for a new form of society, one

that is not dominated by giant multinational corporations, international financial institutions, or repressive governments.

The setting of limits need not result in the end of opportunity. But the limitations *do* mean that our past assumptions of endless expansion within open and growing frontiers are no longer valid. New opportunities can be discovered, but only within the new limits. In order to discover these opportunities, however, we must deepen our social analysis, stimulate our creative imagination, and broaden our vision. The "new frontier" of today is imagination and social creativity, within the bounds of limits that have been imposed upon us. Because the old consensus is breaking down throughout society, this task will be extremely important, but also very difficult. The arduousness of the task raises a special challenge for social analysis and constitutes one of the main reasons for its importance at this time. How can we discover a broad and challenging vision that will give new life to the social struggle?

Fragmentation or Solidarity

Without a new vision, social in-fighting over scarce resources (jobs, fuel, food, etc.) will increase. The response to in-fighting can take two forms--further fragmentation or solidarity.

If *fragmentation* predominates, it will mean that the social sys- tem will be analyzed in terms of its parts, rather than the whole. It will mean immediate, short-range, piecemeal gains by some, at the expense of permanent, long-range, holistic gains by all. Each group will be concerned only about itself, no matter what the consequences for other groups. Such fragmentation could aggravate our social disintegration and yield a negative-sum game.

Unfortunately our heritage of social pragmatism--one that is not linked to a deeper social analysis--leaves us ill-equipped for the long-range, holistic perspective. If we focus only on the pieces--our piece of the pie or anyone else's--and fail to see the larger picture, we will not be able to work together for a strategy that benefits all. We will be easily confused, readily manipulated. Thus, if short-range pragmatism predominates, the tensions among racial and ethnic groupings will grow. Stress in families, between sexes, and among competing interest groups within the nation and in the international arena will increase. Groups that are being hurt by the new stage of the system could find themselves pitted against each other to the ultimate detriment of all.

If *solidarity* is to predominate, a deeper level of analysis needs to emerge. But such analysis will evolve only if we press beyond the pragmatic approach of the past-without abandoning its innovative qualities. Pragmatism can be sustained, but only within a broader framework of structural and systemic analysis of our common social struggle and the linkages of all issues and causes. To achieve that solidarity in action on behalf of justice is a great challenge to all of us using social analysis as a pastoral tool.

ELEMENTS OF ANALYSIS

In any analysis of our social reality, we explore a number of society's elements. Among them are: (1) the *historical* dimensions of a situation; (2) its *structural* elements; (3) the various *divisions* of society; and (4) the multiple *levels* of the issues involved.

History

Central to any social analysis is the historical question, where are we coming from and where are we going? Taking history seriously is a liberating exercise, since it places current events and challenges into a perspective. History relativizes the immediate and situates us in a larger context by clarifying our past and offering insights into our future. The non-historical approach is basically *status quo*-oriented, since it lifts the present out of con- text and treats it as an absolute existing in a vacuum.

Some approaches to social analysis can be non-historical. For example, a strictly "comparative" methodology tends to abstract the present from history. One economic system is compared with another--e.g., capitalism vs. socialism-without stressing the point that these systems have reality only in continually evolving, concrete historical situations. They are not immutable abstractions--what sociologists call "ideal types"--but realities immersed in the day-to-day evolution of life. Failure to attend to the historical dimension can make comparisons, at best, inadequate, and at worst, misleading.

When history is taken seriously, we develop a historical consciousness. This historical consciousness regards the passage of time not simply in terms of natural processes such as the seasons of the year or the biological cycles of growth and decay. Rather, time, in this case, marks a series of specific events in which we are consciously involved and which we can consciously influence. Attending to this consciousness frees people from the tyranny of history's "invisible forces" which, in actuality, are little more than the power of other people to determine the course of our lives. Paulo Freire, the great Brazilian educator, speaks of the dire need for this kind of critical consciousness, because it liberates people from the role of historical objects, empowering them to become its subjects--i.e., agents of change.

We can distinguish two moments in any kind of historical awareness: (1) a *scientific moment* that carefully analyzes the past, and (2) an *intuitive moment* that probes the future.

The *scientific moment* of historical awareness describes social change according to various stages, identifying the evolution of key structures, actors, concepts, etc., over a given period of time. In Chapter 4, such a historical description is presented in a discussion of the stages of industrial capitalism. However, let us indicate at this point a few examples of the scientific moment of historical awareness.

Take, for example, the immigration of people from Europe to the United States at the end of the nineteenth and the beginning of the twentieth centuries. We can see three different

stages of immigration--as experienced by the Irish, Italian, Eastern European, and other people who flocked to the U.S. shores.

First, there was a stage of *separation*, when the new immigrants segregated themselves from the frequently hostile environment in the new land. Native languages, foods, and customs were honored and strengthened. Second, there was a stage of *assimilation*, a period in which the first and second generations born in this country sometimes forgot (or never learned) the old languages and often shunned the traditional neighborhoods, foods, and customs. Some of the daughters and sons of immigrants came into the "mainstream" of U.S. social, economic, and political life. We are currently experiencing a third stage of immigration, that of *identification*. Identification does not mean a return to separation or isolation; rather, it signifies a new pride in ethnic roots, a new sense of one's special culture, and a rejection of the homogenization of society.

Another example of the scientific moment of historical awareness can be found in the shifting forms of racism in the United States. The first form of racism concerning blacks in this country occurred in the plantation economy--outside the emerging industrial economy. The kindest name for this type of racism is *paternalism*. The main racial conflict occurred between the white planter class and the black slave population.

With emancipation, black citizens in the United States faced a new form of racism. They were thrown into an industrial economy where white labor competed with black labor, and both were at the mercy of the white entrepreneurial class. The result was a two-tiered or dual labor market--with blacks most frequently at the bottom of the ladder, holding the lowest paying and most menial jobs. This second stage of racism is called *discrimination*.

We are now facing yet another stage of racism. With a shrinking industrial economy, "structural unemployment" is heavily concentrated among non-whites. An urban "permanent under- class" is developing--a class of people who are isolated from the economic mainstream and ignored. This third stage of racism is called *marginalization*.

A second moment in historical consciousness--less rational and precise than the scientific moment--is the *intuitive moment*. Questioning history from this perspective, we might ask, where are we heading today? What will the world be like five or ten years hence if things continue as they are going today? What directions will the United States take in the future, and what will be the consequences for the Third World?

Historical awareness through the intuitive moment is extremely popular today, stimulating the discussion of various historical "scenarios," "projections," and "alternative futures." Its popularity appears to be one consequence of the rapid pace of change we are all experiencing. We look to the future in order to avoid "future shock." However, it is important to remember that our projections into the future tell us something about our understanding of the present and our appreciation of the past. For example, a vision of an improved future implies both judgments on the past and present, as well as the perception of opportunities for progress in the future.

A Christian is careful to note that the Spirit of Jesus is active in history, operating in the concrete events of persons and communities. Hence, a historical consciousness for the Christian also means a commitment to reading the "signs of the times," the indications of Jesus' Spirit acting in history, calling us forward, challenging our present positions. In *Pacem in Terris* (1963), Pope John XXIII reminded us that the great historical movements of our day-specifically the rise of new nations, the struggle of workers, and the emerging role of women-can be read as "signs of the times" with special messages for all.

Structures

Social analysis looks sharply at the structures of our society, at the institutions within which we live our social lives. These social structures--government, law, education, business, labor, church, family, etc.--are realities that need to be understood if our action for justice is to be effective.

Social justice is itself a structural question, not simply a personal matter. For example, I may not personally be a racist, or a male chauvinist. I may treat women and people of other races as equals, in speech, attitudes, and behavior. However, this personal action does not address the deep justice issues of racism or sexism--unemployment, lack of educational opportunities, discriminatory pay, or lack of access to decision-making positions. These are structural questions.

With the aid of social analysis, we can identify the key operative structures in a given situation and move beyond personal considerations toward specific structural changes. Without such an analysis, we may become paralyzed by those questions so often asked in discussions of social justice: "But how can such-and- such a corporation be engaged in unjust practices when Mr. So- and-So is an outstanding Christian and personal benefactor of many good causes?" At issue is not the goodness of the individual person living within a given system. Rather, it is the system itself that is called into question.

The problem of migrant labor is a good illustration of this point. The issue is not whether an individual grower in the Fresno Valley of California is a good or a malevolent person. Rather, the issue is the system of economic relationships between owner and producer and factors such as labor availability, land tenure, access to market, competition, etc., that lead to the exploitation of the unprotected migrant worker.

Similarly, the problems of Appalachian farmers, whose land is being strip-mined, or those of elderly inner-city residents whose apartments are being converted into condominiums, are basically rooted, not in the personal character of mine-operators or landlords, but in the economic system that encourages the kind of energy industry and real estate business that exists in the United States. Social analysis moves us from persons to structures.

We will look first at the *economic structures* of society--the business and commercial institutions, the industrial and agricultural sectors. The economic structures shape the

basic patterns of production, distribution, exchange, and consumption within a society. Today we tend to think of economic structures in terms of contrasts--between capitalism and socialism, between "free enterprise" and planned economies, etc. However, these terms have many different meanings. Through analysis we may ask questions about the kind of production (e.g., highly technological--i.e., capital-intensive--or employment generating--i.e., labor-intensive), the paths of distribution (e.g., monopolistic or widely shared), the conditions of exchange (e.g., interest rates for loans), and the patterns of consumption (e.g., conducive to waste or to conservation of scarce resources).

The pursuit of such questions gives us insight into the nature of the classes controlling the economy and the values that determine its operations. The myth that the economy is guided by an "invisible hand" is just that--a myth! (For in-depth economic analyses that expose the myth of "neutral" corporations operating in a "free market" system, see Richard J. Barnet and Ronald E. Muller, *Global Reach: The Power of the Multinational Corporations*, New York: Simon and Schuster, 1974; and Charles Lindbloom, *Politics and Markets: The World's Political-Economic Systems*, New York: Basic Books, Inc., 1977. The immensely popular book by E. F. Schumacher, *Small is Beautiful: Economics as if People Mattered*, New York: Harper & Row, 1973, has demolished the assumption that economics is a value-free science, a technical/mechanical approach to management.)

Second, we look at the *political structures* of society, the institutional concentrations of power within a community. These may be the formal structures of representative government at the federal, state, and local levels. Or, the structures may be less for-mal-influential groupings of individuals, networks of organizations, interest group lobbies, social classes, trade unions, churches, and coalitions for *ad hoc* purposes. Social analysis of political structures allows us to determine where and by whom key decisions are made, how much popular participation is involved, and the prospects for the enactment of those decisions.

Finally, we look at the *cultural structures* that serve as the institutional bases for the dreams, myths, and symbols of society. It might seem strange to speak of "institutionalizing" dreams, but in our highly organized modern society, we do this in a variety of ways. The culture of the United States, for example, is a marvelous mixture of numerous ethnic heritages--those of Native Americans, African slaves, and peasants from Europe, Asia, and Latin America. What are the dominant cultural strains in a society, and what happens to the less-dominant strains? Such efforts as cultural preservation and recovery (e.g., through bilingual schools, etc.) have important consequences for U.S. society. What social-psychological aspects influence the course of events (e.g., national feelings of malaise, or stirred feelings of patriotism, etc.)?

In a social analysis that seriously considers all these structures, *institutional alliances* between various structures must also be examined. For instance, what are the connections between the economic structures operative in a region of the country and the political structures that have evolved? What is the relationship between the economic power of multinational corporations and the political power dominant in some developing countries (i.e., military dictatorships)?

The communications media offers striking examples of such institutional alliances. A newspaper can be extremely influential in the economic, political, and cultural aspects of community life-through its advertising policy, its endorsement of political candidates, and its reporting of the arts. When the owners of that newspaper also control other papers, weekly magazines, and television stations, a tremendous concentration of power occurs. Recall the institutional intricacies portrayed in the film *Network*, which described the cut-throat world of national television and the social and political consequences of those entanglements.

Societal Divisions

Although it may be belaboring the obvious, we want to point out that social analysis enables us to see more clearly the divisions of society according to *race, sex, age, class, ethnicity, religion, geography*, etc. These divisions exist, whether we like it or not. Sometimes they are more immediately apparent and more directly operative than at other times. However, they are always present and as such, should be key elements in any social analysis. To ignore them is to bypass the total picture of reality.

It is important to recognize these divisions for two reasons. First, the consequences of a particular event in a given social situation--e.g., an economic upheaval such as a recession--do not affect all people in the same way. Second, some divisions in a pluralistic society such as the United States, if played against each other, can be a disruptive force in the process of social change. Consider, for example, the competition between blacks and other poor ethnic minorities for jobs in a shrinking labor market. As long as other minorities are viewed as the cause rather than the victims of the problem, the systemic cause will not be addressed. However, if these same divisions are viewed analytically within a larger social picture, we can take advantage of opportunities for solidarity in the promotion of a common good. An example of such solidarity can be found in the coalitions of consumer and labor groups that focus on energy issues.

We sometimes speak as if all people enjoy--or suffer--social reality in the same fashion. While we know that this is not true, our speech patterns occasionally say something else. For instance, the most commonly reported figure for unemployment--the one to which certain emergency federal legislation is pegged--lumps all the represented groups together. Yet we know-through experience and as a result of other official statistics that provide a further breakdown of the figures-that unemployment is more highly concentrated among non-whites and youth. Again, we know that anti-union attitudes and anti-union legislation such as "right-to-work" laws generally mean lower wages. But we may fail to note that these laws and attitudes are particularly hard on young black female workers in the South. Or, we may speak of the "establishment" or the "influentials" in politics and business, without averting to the fact that they are predominantly white, Anglo-Saxon, Protestant mates, heavily concentrated in the northeastern section of our country.

Social analysis should make us aware of these divisions, so the intricate dimensions of reality will not be ignored as we shape our responses. To ignore these divisions in the pluralistic U.S. society is to play into the hands of those who would manipulate whites against non-whites, men against women, old against young, and region against region. Such manipulation preserves a status quo in which a few are dominant over the many.

Are there really "classes" in the traditional sense, here in the United States? A discussion about social divisions must inevitably raise this question. The class issue in modern society is extremely complex. It is especially complicated in the United States because of our history of immigration, mobility, and rapid industrialization. Certainly, we can say that socioeconomic status--a combination of income, property, education, employment, etc.--does exist as a determinant to social relationships in this country. A deeper "class analysis," however, enables us to see who makes the major economic and political decisions that affect large segments of the population. A "class analysis" can be made by asking three simple questions:

> **1. Who makes the decisions?**
> **2. Who benefits from the decisions?**
> **3. Who bears the cost of the decisions?**

Consider, for example, a decision to "renew" a particular section of a city. Frequently, such a decision has been made by local government officials--perhaps an elected city council--who do not represent the people living in the area, in conjunction with real estate, construction, and banking interests. Middle and upper-income couples will benefit from the expansion of commercial zones. Lower-income people, frequently non-white and/ or elderly, will be displaced to another section of the city, usually without comparable advantages, and almost certainly without improvements. Similarly, at the national level, major economic decisions for the country (e.g., interest rates, money supply, etc.) are made by less than one percent of the population.

Levels of Issues

Finally, it should be noted that issues occur at various levels--the local, regional, national, and international levels. The framework chosen by the social analyst will indicate the level of the issue; even more important, it will indicate the relationships between levels.

For example, an issue such as the impact of "redlining" on the renewal of a neighborhood has a predominantly local focus. (When a bank refuses to make loans to a particular geographic section of a city because of its "high economic risk"--i.e., its high concentration of racial or ethnic minorities-it draws a "red line" around that particular area on the map.) Or, the issue may have a fundamentally international focus--e.g., the "balance of trade" between the United States and Japan. (The balance of trade indicates whether we are importing more than we are ex- porting and vice versa.)

Responses to issues will vary according to their particular "levels." However, there are strong interconnections between levels; these relationships need to be recognized if effective responses are to be made. Let us again look at the example of "redlining." A

predominantly local issue, redlining may be related to a significant regional issue, e.g., the decision of the banking industry to "disinvest" from the decaying northern industrial cities--in favor of making loans to suburban areas or to the growing industrial areas of the South. The "snowbelt/sunbeit" tension--largely the result of the northern industries moving to southern regions of the United States where labor is unorganized and cheaper--impacts directly on neighborhoods in the northern cities. Similarly, energy decisions that may affect whole regions--e.g., the consequences of strip-mining in Appalachia--are tied to international issues such as the price of oil and the relationship of the United States to OPEC nations.

The analysis of issues according to their various levels and interconnections is important because it rectifies the misconception that local issues are in competition with global issues. One of the most significant developments in the U.S. social justice movement in recent years has been the recognition that the dichotomy between domestic and international problems is an inaccurate representation of reality. All of the problems are part of a whole. The relation of the parts to the whole can be understood with the help of a few fundamental questions: Who has power? For whom is it used? Guided by what values? With what vision of the future? These questions are appropriate--and revealing--at every issue level.

SUMMARY/CONCLUSION

By devoting this chapter to the introduction of social analysis as a tool of pastoral practice, we have opted for an approach that could have confusing consequences. We have chosen to *talk* about social analysis rather than *do* social analysis. Nonetheless, we believe that it is important to describe at the outset what social analysis attempts to do, why it is difficult, and what aspects of reality it explores. The approach we have described locates the task of social analysis within a "pastoral circle" aimed at action on behalf of justice.

In the following chapters we will apply our analysis to a variety of the social challenges facing us today. In the light of what we have said in this introductory chapter, it should be clear that our approach will be:

• *historical*, **i.e., discerning the distinct structural contexts of distinct periods and the different tasks of strategy in each period.**
• *structural*, **i.e., emphasizing the importance of under- standing how society is generated and structured and how social institutions interrelate in social space.**
• *value-laden*, **i.e., oriented toward social justice, particularly for the poor.**
• *non-dogmatic*, **i.e., drawing upon a variety of perspectives and "schools" of analysis.**
• *action oriented*, **i.e., promoting responses by individuals and groups to the pressing social problems of today.**

Using the Internet to Teach Social Justice
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Pedagogy and Method, Briefly

There are a variety of social justice pedagogies and methods. However, those that are inspired by or related in some way to the spirituality of St. Ignatius share a few common elements. Bernard Lonergan, S.J. offers five "transcendental precepts," which are foundational for any act of self-transcendence: be attentive, be intelligent, be rational, be responsible, and be in love. Assuming that education in the Jesuit tradition is in part conversion and in part self-transcendence, the following "levels" are common to many pedagogies of social justice: (1) a level of experience and attention; (2) a level of understanding, intelligence, and theory; (3) a level of imagination, rational judgment, and value; and (4) a level of responsible decision and action. The classroom, however, rarely engages the student on all four levels. Thus, social justice education necessarily transcends the classroom, and raises the question of appropriate "divisions of labor."

There is no substitute for direct experience, especially regarding social justice education. But, the classroom does not need to be limited to the second level of social justice pedagogy, namely the level of analysis and theory. The classroom itself can also become a source of level one data. When Lonergan urges us to be attentive, he is asking us to be attentive not only to the data of our own "hands on" experience, but also to data of consciousness itself. Exposure in the classroom can nourish a students' desire to transcend their own sphere of knowledge and interest. Intentional self-transcendence is part of the goal of Ignatian education mentioned by Father Peter-Hans Kolvenbach in his address at Santa Clara University on October 6, 2000. Another aim, moral conversion to a heightened concern for and awareness of social injustice, can sometimes enjoy a spontaneity resulting from classroom exposure and attention. Thus, a primary concern for social justice pedagogy in the Ignatian tradition is attention.

Buried under the information age

The Internet began what many have called the age of information. The challenge of the information age is not its poverty of resources, but its plethora. Search engines, like Google, can be a greatest resource for teachers or a daunting onslaught of information. For example, Google returned 2.6 million hits for a search on "social justice" and 2.5 million hits for a search on "poverty." Another challenge confronting Internet users is the credibility of sources: whitehouse.com is nothing like whitehouse.org (a simple mistake). There must be some way to focus attention and narrow the scope. This section of the social justice reader is an attempt to identify responsible Internet usage for social justice

pedagogy. I have noted three focal points for attention regarding social justice and the internet:

(1) *source criticism* is as crucial for internet usage as it is for television, print, and other media sources (perhaps even more so). The challenge of attention to social justice matters might be called *inattention*. An anecdote illustrates my point: I keep CNN.com as my homepage and one of my news sources. On February 22nd, 2004 there were 8 headlines on the homepage. One of the headlines was a link to a story about the death of spot, the famous White House dog of George W. Bush. Next to the "spot story" was a report from Uganda that 191 people had been murdered by the Lord's Resistance Army in a refugee camp. Many of the LRA soldiers were children around 11 years old, who had set fire to numerous huts burning many women and children inside. I read the article and wanted to explore it further; however, the NY Times online and the LA Times online did not carry the story, or at least not anywhere I could find after a cursory search. Does spot's death deserve the same headline location as the massacre in Uganda? I hope my anecdote illustrates the difficulty of finding sufficient sources of news to those who are committed to social justice pedagogy.

(2) A fruitful use of the internet for social justice pedagogy comes by way of the *via negativa*. As Plato illustrates in book one of *The Republic*, it is wise to start with cases of injustice when exploring the demands of justice. After all, Google will fetch 2.6 million hits for "social justice" but a mere 124,000 for "blood diamonds." Pedagogically and functionally, the *via negativa* is one way to make the Internet a fruitful resource for the category of attention.

(3) There are numerous *institutional alliances*, forming an ideological community concerned with social justice pedagogy and employing "preferential option for the poor" as an organizing principle. Identifying members of these ideological alliances is an important task in itself.

The following section is a cursory and initial attempt to identify (I) sufficient and reliable sources of information concerning social justice issues, (II) a brief list of contemporary challenges to social justice, and (III) institutional alliances. Since this list is cursory and initial, I welcome any suggestions and contributions with the hope of updating this section frequently. Feel free to contact me at skelley@luc.edu

(I) SOURCES

Amnesty International	http://www.amnestyusa.org/home.html
Archdiocese of St. Paul and Minneapolis	http://www.osjspm.org/
Association of Jesuit Colleges and Universities	http://www.ajcunet.edu/
CorpWatch	http://www.corpwatch.org/home/PHH.jsp
Global Policy Forum	http://www.globalpolicy.org/
International Labor Organization	http://www.ilo.org/
International Monetary Fund	http://www.imf.org/
No Logo	http://www.nologo.org/
Oxfam	http://www.oxfam.org.uk/

Public Citizen	http://www.citizen.org/index.cfm
Sustainable Development	http://www.colby.edu/personal/t/thtieten/cases.html
The Center for Public Integrity	http://www.publicintegrity.org/default.aspx
The United Nations	http://www.un.org/english/
The World Bank Group	http://www.worldbank.org/
U.S. Department of State	http://state.gov/
USAID	http://www.usaid.gov/
Witness	http://www.witness.org/

(II) RESOURCES FOR AND CONTEMPORARY CHALLENGES FACING SOCIAL JUSTICE
Sweatshops – Maquiladores
http://sweatshops.org/
http://www.fieldsofhope.org/
http://www.nikewages.org/
http://workersrights.org/
http://www.nlcnet.org/
http://www.behindthelabel.org/
Conflict Diamonds
http://www.amnestyusa.org/amnestynow/diamonds.html
http://www.professionaljeweler.com/archives/hottopics/hr918.html
http://www.phrusa.org/campaigns/sierra_leone/jewelers_display.php
http://magma.nationalgeographic.com/ngm/data/2002/03/01/html/ft_list_20020301.html
http://www.thepetitionsite.com/archived_petitions/905039408.html
http://www.debeers.com/
http://www.westafricareview.com/war/vol2.2/un-report.pdf
Fair Trade Coffee
http://organicconsumers.org/
http://www.globalexchange.org/campaigns/fairtrade/coffee/
http://www.transfairusa.org/
http://www.equalexchange.com/
http://www.oxfamamerica.org/campaigncoffee/art3391.html
Oil & Developing Economies
http://www.globalexchange.org/campaigns/oil/
http://www.smh.com.au/articles/2002/08/07/1028157964435.html
Predatory Lending
http://www.hud.gov/offices/hsg/sfh/pred/predlend.cfm
http://www.hud.gov/offices/hsg/sfh/buying/loanfraud.cfm
http://www.responsiblelending.org/
Private Interest and War (Naomi Klein)
http://www.corpwatch.org/issues/PID.jsp?articleid=10088
http://www.publicintegrity.org/wow/default.aspx
School of Americas
http://www.soaw.org/new/
http://www.ciponline.org/facts/soa.htm
http://www.soawne.org/
http://carlisle-www.army.mil/usamhi/usarsa/

http://www.hartford-hwp.com/archives/40/index-a.html
Third World Debt
http://www.jubileeusa.org/
http://www.nccbuscc.org/jubilee.htm
http://www.debtlinks.org/
UN Declaration on Human Rights
http://www.un.org/Overview/rights.html

(III) INSTITUTIONAL ALLIANCES
Catholic Relief Services   http://www.catholicrelief.org/
Center of Concern   http://www.coc.org/
Jesuit Conference   http://www.jesuit.org/JCOSIM/advocacy/
Jesuit Refugee Service   http://www.jesref.org/
Creighton University http://www.creighton.edu/CollaborativeMinistry/justice-links.html
Archdiocese of St. Paul and Minneapolis   http://www.osjspm.org/
United States Conference of Catholic Bishops
          http://www.nccbuscc.org/sdwp/projects/socialteaching/index.htm

Contemporary Theories of Justice

Introduction by Daniel Hartnett, S.J.

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What is justice? What are the ingredients of justice? Is there a single over-riding principle of justice that can encompass all of our activities and apply to such varied circumstances? Or must there be different kinds of justice and, if so, how do these relate to one another? What are the origins of justice? What is the relationship between justice and law? Does justice emerge from natural reason or does it rest on the understanding of a social contract? Is justice a personal virtue or a structural feature to be found in social institutions? How can justice be taught or instilled? These and many similar questions have remained central to philosophical inquiry from its Socratic beginnings.

The contemporary debate on justice was triggered by the publication of John Rawls' *Theory of Justice* (1971). Why did this particular book enjoy such appeal? One must keep in mind that Rawls was writing in the late 60s: a time when, with all the fallout associated with the Vietnam War, liberalism was becoming suspect both around the world and also here at home. Within the United States itself, people were increasingly aware of the gap between our lofty democratic discourse and our not-so-lofty political practices. And people were becoming downright discouraged by the persistence of poverty and racism in the land. Rawls' monumental work, while not providing facile recipes for local politics, did offer a fresh theoretical foundation for conceiving our liberal democratic political institutions.

Not surprisingly, Rawls' work generated considerable praise as well as criticism. Robert Nozick (*Anarchism, State and Utopia*, 1974) disputed Rawls' notion of distributive

justice, arguing that people should be "entitled" to whatever they earned or inherited legally. Michael Sandel (*Liberalism and the Limits of Justice*, 1982) challenged the individualistic conception of moral agent that underlies the Rawlsian account of justice. Michael Walzer (*Spheres of Justice*, 1984) claimed that Rawls made the mistake of defending a single overriding principle of justice when, in fact, our lives are lived within a variety of different "spheres," each displaying its own problems and requiring its own solutions. And Alasdair MacIntrye (*Whose Justice?, Which Rationality?*, 1988) reminded people of the desperate need to re-situate the justice conversation within a larger communitarian context and the Western tradition of virtue ethics.

It would be virtually impossible to survey all of the literature that has been written on social justice over the past couple of decades. The number of major monographs alone is frankly breathtaking. In this section of *JUST READINGS*, the reader will receive an orientation to the main contemporary views on social justice: (1) Alexei Marcoux's presentation of Libertarianism, (2) David Ingram's synopsis of Rawls' liberal-reformist perspective, (3) Thomas Wren's synthesis of Communitarianism, (4) David Schweickart conception of socialist justice. These excellent articles not only provide a taste of the rich theoretical debate that has taken place since the publication of Rawls' book, but they also offer an effective map with which to navigate within the forest of contemporary scholarship on justice.

A caveat is in order. As important as the theoretical debate is – and theory certainly matters when it comes to issues of justice! – it alone will not provide the reader with a firm grasp of the state of justice in the world today. Any serious effort to get a real handle on the status of justice today must also pay careful attention to the growing faces of injustice. One misses a great deal by only looking at formal theories of justice. Attunement to the real faces and narratives of injustice is not just a prelude to the study of positive theory, but constitutes the standpoint from which theory should be done.

The Libertarian Alternative
to Social Justice
Alexei M. Marcoux

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Libertarianism as Liberalism

Libertarianism is a normative political philosophy, in general, and a normative political morality, in particular. By *normative*, we mean it is an account of what ought to be or of what we ought to strive for. By *political morality*, we mean an account of what it is morally permissible to do or to try to achieve through state action.

Libertarianism is a form of *liberalism*. Liberalism is the family of normative political philosophies holding that liberty is the paramount political value. Libertarianism might be thought of as a pure and exacting strain of liberalism. It holds that each person ought to have the maximum liberty consistent with others having the same. It conceives of liberty in essentially negative terms, as the absence of external restraint or compulsion, not in positive terms, as claims on goods or services provided by others (but see Spector 1992, who advances a positive rights account of libertarianism). For example, the right to free speech means that others may not seek forcibly to restrain you from speaking or to make you say what you do not wish to say. It does not mean that others are obligated to provide you with an audience, a stage, or a microphone.

Self-Ownership and Voluntary Social Order

The central claim of libertarianism is that we, as human beings, are each *self-owning*. I own my body and my will; you own your body and your will. From this it follows that my activities ought to be the ones I choose and your activities ought to be the ones you choose. Collaboration and cooperation between us is permissible only if it is *consensual* for each of us. It is wrong for me, through physical force or the threat of it, to seek to direct your activities and it is wrong for you, through physical force or the threat of it, to seek to direct my activities. For the libertarian, only the *retaliatory* use of force is justified. It is permissible to use force only against those who use force, or threaten force, against others. Appeal to the general good or other goals cannot justify securing participation in a scheme, no matter how worthy, at the point of a bayonet. Thus, the libertarian opposes military conscription, national service programs, or any scheme that enlists people in collective efforts against their will.

The libertarian denies what is implicit, to varying degrees, in other theories of just social order—the *team conception* of society. According to this conception, citizenship in a

political order is like membership on an athletic team, with government as coach. The coach sets the goals and each of us (reminded intermittently that ' there is no *i* in *team*') must stand ready to forswear personal goals and projects, to 'take one for the team'. For the libertarian, the values of team spirit and sacrifice for joint enterprise are laudable when, like the obligations of friendship, they are undertaken voluntarily. However, these same values take a sinister turn when the coercive apparatus of political authority thrusts them upon us unwillingly. A just social order is one that facilitates the pursuit of the many projects chosen freely by persons, subject only to a prohibition upon employing force or fraud against others. Returning to the athletic metaphor, good government is a referee, applying impartially the rules of a game in which the players pursue many disparate and often conflicting ends, not a coach, organizing the players into a cohesive whole by giving them their end.

Social Justice or Just Social Order?

Characterizing the libertarian position on social justice depends critically upon the relationship between social justice and *distributive* justice. A theory of distributive justice describes a *pattern* to which the distribution of benefits and burdens in a social order ought to adhere. Whether it is the Marxist 'from each according to ability, to each according to need' or the egalitarian 'equal shares for all', accounts of distributive justice specify a pattern and employ it as an ideal against which to evaluate extant social orders. A distribution, and hence the social order in which it appears, is unjust to the extent that it deviates from the pattern. Action taken to redistribute benefits and burdens, to make the distribution adhere more closely to the preferred pattern, is a demand of social justice. Social justice consists in commitment to an egalitarian or need-based theory of distributive justice coupled with a corrective program of takings and givings designed to make the social order more closely resemble the ideal pattern.

Libertarianism is opposed to the very concept of social justice. It views social justice as *counterfeit* justice and offers an alternative vision of a just social order. Robert Nozick (1974) stresses the incompatibility of a strong commitment to pattern principles of justice with liberty. The problem is that *liberty upsets patterns*. The free and consensual actions of people living and trading together (performing, in Nozick's famous phrase, 'capitalist acts between consenting adults') are likely to conform to no particular pattern of distribution (be it in accord with need, merit, or equal shares) and are certain to upset any preferred pattern that may be achieved. Consequently, efforts to achieve and maintain a preferred pattern necessarily entail forcing people to transact in ways they would rather not (enforced gifts or exchanges) and to avoid transacting in ways they would prefer (prohibited gifts or exchanges). In short, realizing a preferred pattern of distribution requires rigorous, coercive social control. If liberty is the highest political value, we cannot adopt pattern principles of justice; if we adopt pattern principals of justice, we are not genuine liberals.

In the second volume of his *Law, Legislation, and Liberty*, subtitled *The Mirage of Social Justice*, the Nobel Laureate economist and social philosopher F. A. Hayek is unsparing:

> I have come to feel strongly that the greatest service I can still render to my fellow men would be that I could make the speakers and writers among them thoroughly ashamed ever again to employ the term 'social justice' (Hayek 1975: 97).

For Hayek, social justice is counterfeit justice because justice is an attribute not of a pattern or magnitude of holdings, but of human action. Wielding political authority to take from Peter and give to Paul is just only if Peter has, through his actions, *wronged* Paul—as, for example, if Peter has stolen from Paul, or struck Paul with his automobile, or defrauded Paul. The libertarian critique of social justice, then, is centered not only on the commitment to distributive justice, but also on the erroneous application of corrective justice—*to* those who have done no wrong and *for the benefit of* those who were not wronged by them.

Libertarians offer a vision of a just social order that Nozick, in a play on the Marxist conception, characterizes as 'from each as he chooses, to each as he is chosen'. A just social order is one governed by general and abstract rules of conduct prohibiting the use of force or fraud against others and employing force only against those who violate this prohibition. A just distribution of benefits and burdens is *any* distribution resulting from the uncoerced and unrestrained interactions of free people. A distribution is just if the transactions by which it is achieved are consensual and free of fraud. The pattern of holdings among participants in the social order has no bearing on whether that distribution is just or not.

Justice, for the libertarian, is a matter of historical inquiry. The question is not *How much do you have relative to others?* but *How did you get what you have?* Otherwise identical holdings or patterns of holdings may be just or unjust, depending upon *how* they were achieved. This is a common sense point. Few among us would hold that a regime of equal shares for all was just if it was achieved and maintained by slaughtering all those who had more, and all of those who had less, than the preferred holding. Virtually all among us would agree that this same pattern of distribution was just if it was achieved through the free and uncoerced activities of participants in the social order. It is not what people have, but how they got it, that makes their holdings just or unjust.

Bibliography and Suggestions for Further Reading

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Narveson, Jan. 1988. *The Libertarian Idea*. Philadelphia: Temple University Press.

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Nozick, Robert. 1974. *Anarchy, State and Utopia*. New York: Basic Books.

Spector, Horatio. 1992. *Autonomy and Rights*. Oxford: Clarendon Press.

Selections from David Boaz' *Libertarianism: A Primer* (1997, Free Press) are available at http://www.libertarianism.org/.

An animated introduction to Libertarianism is available at www.free-market.com/resources/introduction.html and www.free-market.com/resources/introduction.swf.

Social Justice from the
Liberal Reformist Perspective:
David Ingram on Rawls

David Ingram

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Until his death in 2002, John Rawls was perhaps the best known living social and political philosopher of the late twentieth century. He has been credited with revitalizing moral and political philosophy (especially that branch associated with social contractarian thought). More important for our purposes, his theory of justice was widely regarded as providing a moral foundation for the welfare state.

"Justice as Fairness"(1957) sets out the basic outline of Rawl's later masterpiece, *A Theory of Justice* (1971). In the later work, Rawls qualifies his theory in several important respects. First, he notes that his theory applies only to societies that have achieved a certain level of affluence. Second, Rawls assumes that the people in these societies will think of themselves as individuals, or heads of households, who all want the same essential (primary) goods, regardless of their differences in tastes, beliefs, and values. These goods include, among other things, freedom, self-respect, and income. Third, Rawls assumes that these people will be predisposed to behaving both reasonably and rationally. Reasonable people have a conception of the good which they seek to realize with the help of others and so understand that they must order their social relationships in accordance with principles of justice that all can voluntarily endorse. They will not seek to impose their particular conception of a life properly lived on others, nor will they envy others who have fairly acquired more than they have. Rational people, by contrast, will not gamble away a secure level of welfare for the risky and unlikely chance of acquiring greater wealth. In sum, as Rawls eventually came to realize, his theory of justice optimally applies to just those relatively affluent states that have evolved liberal democratic political institutions.

The question Rawls raises can thus be formulated accordingly: how should the citizens of such states think about the justice of legal, political, and economic institutions that determine the basic distribution of burdens and benefits? Rawls's answer to this question consists of three parts. The first part suggests two ways in which one might answer the question, utilitarian and social contractarian, and proceeds to defend the superiority of the latter approach. The second part proposes a distinctive rationale for conceiving the social contractian theory of justice as a certain kind of thought experiment designed to capture our most thoughtfully considered intuitions about fair play. The final part adduces two principles of justice that best articulate these intuitions. Taken together with their

underlying rationales, these principles endorse a society that is strongly inclined toward promoting social equality between citizens and protecting and empowering the most disadvantaged segments of the population.

Rawls develops the first part of his response toward the end of the essay we are reading. Basically, we can think of justice in two ways. On one hand, we can think of it as designating an optimal outcome. On this view, the way the outcome is achieved is unimportant. Suppose someone thinks that an optimal outcome is treating everyone identically, so that everyone has the same set of goods (perhaps because we believe that no person's life is worth more than another). In this case, the fact that persons have done certain things in the past for which they otherwise might have merited more than others is irrelevant to their receiving an equal share of goods.

Most philosophers and economists who adopt an outcome-oriented approach follow the precept of utilitarianism, which holds that justice and all other moral values are to be valued because they bring about the greatest overall satisfaction. For them, the question about what needs get satisfied - and the question about how they are satisfied – is unimportant. If it is necessary that a small racial minority be enslaved to satisfy the majority's penultimate desire to satisfy its craving for racial superiority, then it is just that it be so.

The second, social contractarian approach favored by Rawls condemns this result as unjust. For Rawls, social justice designates not an outcome, but a fact about the way in which people relate to one another. This approach explains why people would voluntarily cooperate with one another in the first place. The answer is that they would do so only if it worked to their common benefit, where the benefit in question is understood as advancing the interests of each of them taken individually. In other words, society must be imagined as a kind of social contract based on reciprocity, or the idea that each person can count on others to help advance his or her interests only insofar as he or she returns the favor. Obviously, a slave society could not count on the voluntary cooperation of enslaved peoples to work for the advantage of the majority.

The second part of Rawls's response to the question of how people should think about justice contains a more detailed description of the social contract that is designed to sharpen our understanding of what reciprocity means. Ideally, reciprocity means impartiality, or relating to one another according to rules that acknowledge the importance of respecting other persons' vital interests as possessing the same worth as one's own. In "Justice as Fairness," Rawls talks about setting up rules (institutions and social practices) that would be accepted by everyone as fair, no matter how they, as individuals, ended up in society. As Rawls puts it, even if one ended up in the worst position in society as a result of playing by the rules (the position in which, as Rawls puts it, "his enemy were to assign him his place"), that person would still acknowledge the fairness of the outcome. In A Theory of Justice, Rawls develops this idea of "procedural" (as opposed to outcome-based) justice by appeal to a hypothetical social contract in which each of us imagines that we are ignorant of our own social circumstances, so that, for all we know, we could just as well be anyone else in our society. Imagining what

rules of fair play we would adopt under these circumstances forces us to be fair-minded in our deliberation. For then our deliberation is not biased by our individual circumstances (in which considerations of wealth, race, gender, ability, and cultural background influence our thinking). Indeed, this thought experiment helps us to appreciate why such considerations are irrelevant. Assets (handicaps) and (dis)abilities that we have acquired through sheer luck (or sheer bad luck) stemming from the undeserved accidents of birth and social circumstance should not have a fundamental bearing on the way in which society's ground rules distribute burdens and benefits.

We now see why the rationale underlying justice as fairness supports two aspects of social welfare: the idea that everyone should have an equal opportunity to succeed in life, no matter how lucky or unlucky they have been in the lottery of birth and social circumstance; and the idea that no one should be denied a decent life because their handicaps prevent them from contributing as much as others to the common good. Justice as fairness requires that society try to neutralize as much as possible the undeserved advantages and disadvantages of birth and social circumstance by creating institutions – such as universal healthcare, social security benefits, and good public schools – that ensure a "level playing field" in the competition for desirable jobs and essential services. It also requires that society take on the responsibility for helping others who, through no fault of their own, cannot help themselves. In order to respect the equal dignity of those who are handicapped, disabled, unemployed, or otherwise unemployable due to circumstances beyond their control, it is important that this responsibility be understand as a matter of justice – of duty and right – and not a matter of charity.

The third part of Rawls's response to the question about how people should think about justice consists in proposing two fundamental principles of justice that he feels best articulate our intuitions about fair play, as set forth above. The first principle – the so-called liberty principle – says that each individual should have the greatest freedom to order his or her life as he or she sees fit, compatible with a like liberty for all. As societies become increasingly affluent and developed, and basic needs are guaranteed satisfaction, freedom increasingly assumes a prominent place among the basic goods desired by people – so much so that most people would not trade freedom for greater increments of wealth. The principle of fairness requires that everyone be given the same liberty (the same rights) and the same (equal) treatment under the law, except in cases where doing so will interfere with the full exercise of some other right. (For instance, it is acceptable to withhold the right to sign contracts, drive vehicles, and the like from children or mentally incompetent persons, because giving them this right would likely interfere with exercising their right to life.)

While the first principle of justice addresses the fair distribution of civil and political rights, the second addresses the fair distribution of benefits and burdens that unequally fall on different persons in the normal course of holding down different jobs. According to Rawls, rational people are risk aversive, and so would not enter competitive social relations voluntarily if the chances of losing and ending up with very little were very great. Hence, in his opinion, the only morally acceptable reason why rational persons would consent to a scheme of cooperation for mutual benefit would be if the unequal

distribution of benefits and burdens – such as prestige, wealth, liability to taxation, and so on – worked to everyone's advantage, including – as he puts in A Theory of Justice – the worst off members. The rationale behind this principle appeals to both efficiency and fairness. As for the first value, it is rational to want jobs and offices performed efficiently by those who are best qualified. In order to ensure that the best qualified fill these offices, it is necessary that everyone be free to compete for them fairly. Furthermore, because acquiring the requisite qualifications often requires years of schooling and other sacrifices in time and money spent, it is not unfair to compensate persons with higher than average benefits as a reward for completing such a risky course of studies, especially if doing so is necessary to attract an acceptable level of adequately trained applicants.

In sum, Rawls's principles of justice strongly incline toward an equal distribution of all the goods that are normally thought to comprise welfare, unless doing so either conflicts with the exercise of basic rights or does not work to the benefit of the worst off members of society. It thus remains an open question whether our own society's deviation from the baseline norm of equality is just on Rawlsian principles. For instance, does allowing lucky individuals the right to inherit large estates valued in the billions of dollars conflict with providing equal opportunity for all in competing for desirable jobs, or is this practice somehow necessary for ensuring that the most disadvantaged have their basic needs met?

John Rawls' essay, "Justice As Fairness" in the *Journal of Philosophy* (Vol. 54, No. 22, 1957) is available through JSTOR at the following address:

http://links.jstor.org/sici?sici=0022-362X%2819571024%2954%3A22%3C653%3AIJAF%3E2.0.CO%3B2-6

Social Justice from the Communitarian Perspective: Thomas Wren on MacIntyre

Thomas Wren

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Over his long and distinguished career, the philosopher Alasdair MacIntyre (1929–) has represented the communitarian perspective in numerous books and articles about political theory, the history of ethics, virtue, and the nature of rationality. However, to understand what is distinctive about his communitarian conception of social justice, one must appreciate the more general contrast between liberal and communitarian theories of society as well as the related contrast between their respective views of human nature. In Anglo-American circles as well as in most of Europe over the last thirty-five years, the philosophical conversation about justice has been dominated by the liberal understanding of justice as centered on impartiality, equality, and respect for others regardless of their cultural similarities or differences – in short, by the idea of justice as fairness. Although this idea is rooted in the philosophy of Immanuel Kant, its current dominance is due mainly to the work of a single philosopher, the late John Rawls.

In 1971, which was the same year that MacIntyre published his anti-liberal essay *Against the Self-Images of the Age* and ten years before the appearance of his Aristotelian account of justice in *After Virtue,* Rawls introduced his own magisterial work *A Theory of Justice* by proposing the now-familiar distinction between the *concept* of justice and its various *conceptions*. The concept of justice, Rawls wrote, is the general idea that "institutions are just when no arbitrary distinctions are made between persons in the assigning of basic rights and duties and when [their] rules determine the proper balance between competing claims to the advantages of social life" (p. 5). In other words, those who think about what it means to live in society can agree on this general idea even though they differ on what counts as an "arbitrary distinction" and the "proper balance" of competing claims. They will agree on the general role of justice – i.e., its concept – in spite of their different conceptions of how that role should be fulfilled.

Rawls went on to argue for his own conception of justice, which refines and elaborates the classical liberal conception of justice as fairness. His conception of justice shaped social philosophy over the next several decades and, not surprisingly, presupposed an Enlightenment understanding of the human person, society, moral philosophy, and – running beneath all these themes – the concept of rationality itself. Working under the long shadow of Kant, Rawlsian liberals maintain an avowedly ahistorical conception of rationality and, like Kant, believe that when we formulate principles of justice we implicitly formulate them for all people, for all times and places.

However, the general concept of justice can also be theorized from nonliberal perspectives, of which one of the most important is the communitarian perspective represented by MacIntyre. One need not step outside history in order to think rationally, and this point applies to thinking about justice as well as related themes such as the three just mentioned, viz., the human person, society, and moral philosophy. In his *Whose Justice? Which Rationality?* (1988) as well as *Three Rival Versions of Moral Enquiry* (1990), MacIntyre agrees with Rawls that the demands of justice correlate with what rationality requires of us. However, he goes beyond Rawls by claiming that "disputes about the nature of rationality in general and about practical rationality and particular are apparently as manifold and as intractable as disputes about justice. To be practically rational, so one contending party holds, is to act on the basis of calculations of the costs and benefits to oneself of each possible alternative course of action and its consequences. To be practically rational, affirms a rival party, is to act under those constraints which any rational person, capable of an impartiality which accords no particular privileges to one's own interests, would agree should be imposed. To be practically rational, so a third-party contents, is to act in such a way as to achieve the ultimate and true good of human beings. So a third level of difference and conflict appears" (p. 2).

What accounts for the difference between these three conceptions of rationality and/or justice? In the passage just cited, no explanation is given and so one might assume that what divides MacIntyre's three "contending parties" are simple personality traits: some people are more methodical, some more outcome-oriented, etc. However, it is clear from what he has said elsewhere that these and other conceptions of rationality (MacIntyre does not claim that his list is exhaustive) are culture-specific: they constitute and are constituted by the intellectual traditions of historical groups or – to use the term in its largest sense – *communities*. To see the difference it makes to take a liberal or communitarian perspective, we may consider how the contrast between these perspectives works at the three levels of human experience mentioned above.

1. The Human Person. At the first level, that concerned with the human person as a moral agent, these three conceptions of rationality correspond to three conceptions of how human interests should be pursued. (a) In the first case, which is that of instrumental thinking and enlightened self-interest, rationality requires that one be prepared to sacrifice some of one's interests when doing so will in the long run produce the most benefits for oneself. The demands of prudence often lead to altruistic behavior on the part of individuals since cooperative action is usually more productive for all concerned, but considerations of "social justice" have no moral weight in themselves. (b) In the second case, which is that of classical liberalism, rationality does not require that individuals sacrifice their interests but only that they understand them as part of a larger set of interests, all of which have equal claims. The idea of social justice as equality of opportunity corresponds to this conception of rationality as impartiality. (c) In the third case, which is that of communitarianism, rationality requires that one seek the ultimate and true interest of human beings, which implies that those who share a common field of action also share a common conception of the good. Ideally, this conception would be the same for all human beings; however, human history does not work that way and

conceptions of the good differ from group to group, age to age, culture to culture. There are many traditions, but within each tradition the rational thing to do is to be faithful to its core values and teachings even though one may – with equal rationality – examine some of its specific features and perhaps uncover certain injustices that are inconsistent with its own conception of the good. This internal critique will cause the tradition to change in ways that at some later date will be seen as evolution or moral progress.

The liberal–communitarian debate (see Wren, 2004), which over the last quarter century has pitted the partisans of groups (a) and (b) against each other, has usually turned on the question of whether human personality is best thought of individualistically, which is to say in terms of autonomy and its correlates (freedom, critical thinking, self-realization), or collectively, which is to say in terms of historical embeddedness and its correlates (relationships, cultural identity, loyalty, shared sense of a common good). As the debate proceeded, each side has been able to mount telling objections against the other's position in terms of abuses all too common in our own century. For instance, liberals pointed to the conformism characteristic of "authoritarian personalities" whose tendencies toward fascism are now well documented (Adorno et al., 1950), and communitarians decried the rootlessness and anomie of decontextualized individuals as "the malaise of modernity" (Taylor, 1993). MacIntyre's own sympathies are, of course, with the communitarians, but his emphasis on the evolving character of historical traditions is distinctive.

2. Society. At the second level, that of society and its political structures, MacIntyre's three conceptions of rationality are relatively easy to identify. (a) The first, purely calculative conception is "value free," and its paradigm is the bureaucrat who plays a necessary but not at all sufficient role in the society's efforts to achieve its goals. These goals presumably encompass more than the smooth functioning of the bureaucracy itself, but it is not part of the formal job description of the rational bureaucrat that his or her activity must promotes social justice. (b) The liberal view of social rationality also emphasizes procedure – in this case governance procedure – but it considers much more than the simple efficiency with which the procedures operate. For liberals, rationality demands that legislative and other adminstrative processes or institutions be impartial, that they not be designed to favor one segment of society over another, and that those who advocate policies and practices be prepared to justify them on grounds that make sense regardless of one's private values and beliefs or the shared conceptions of the good that are specific to a cultural group. (c) In contrast, the communitarian view of social rationality is that it is not only permissible but morally and politically incumbent on those who govern a society that its institutions promote what is truly good. However, this view carries the proviso that even when there is a single conception of the good that controls the way a society is governed it does not automatically follow that individual members of that society must be forced to accept the prevailing conception of the good. In other words, a communitarian society need not be intolerant or coercive, a point that has been spelled in detail in Michael Walzer's *On Toleration* (1992).

In the liberal-communitarian debate the difference between these conceptions of rationality is reflected in their contrasting views about where the conception of the good fits into the political sphere of an ideal society, whether having some such conception is a

necessary condition for that society's having any viable conception of social justice, and the extent to which a society's concrete conception of social justice and its norms will be shaped by its conception of the good. As just noted, the liberal view is that in an ideal society no special conception of the good is privileged or decisive. Communitarians reject this view, arguing instead that political structures are inevitably shaped by conceptions of the good even though these conceptions are culture-specific. In other words, not only is there nothing wrong with the state giving special support to particular traditions and values (e.g., having a national religion), but that in some cases doing so is vital to the well-being of the state itself and its efforts to achieve social justice.

3. Philosophy and Social Justice. At the third level, that of philosophical theorizing about social justice, the three conceptions of rationality break out as follows. (a) Rationality as cost-benefit analysis is, in itself, either morally neutral or – what for many philosophers is the same thing – purely instrumental since it provides no hints as to what in real life should be counted as a "cost" or "benefit" and, consequently, no criteria for distinguishing between social justice and injustice. (b) In contrast, liberals see the first sort of rationality as a component of a larger process of decision-making, in which the demands of rationality are capable of generating a philosophy of social justice, according to which it would be wrong to use unfair or otherwise unacceptable procedures in order to attain substantive goods or ends, no matter how worthy these goals are in themselves. This is an essentially deontological (duty-oriented) conception of justice. (c) Communitarianism, on the other hand, refuses to adopt the detached perspective of the impartial reasoner, insisting instead that all perspectives, including moral perspectives, are inherently historical and hence relative to one's socialization history. For communitarians, moral principles express the community's sense of its own history and its own conception of the good, which can be thought of either as the common good, as personal flourishing, or as some combination thereof. Here as in the previous descriptions of communitarianism MacIntyre is a central figure.

Conclusion: Communitarians, like liberals, recognize the importance of the concept of justice for a society, but unlike liberals they do not suppose that there is a single conception that applies or should apply to all societies, any more than they suppose there is a single mode of rationality that cuts across all cultures. For this reason, it is somewhat misleading to set the two perspectives in four-square opposition to each other when discussing questions of social justice. Liberal rationality is one, but only one, culture-specific way of thinking about justice. In a nation of immigrants such as the United States, it may even be the best way – "best" in the sense of most appropriate to its historical and social conditions – to think about justice. MacIntyre would certainly agree with the former proposition, but it is not clear that he would accept the latter.

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Rival Justices, Competing Rationalities
Alasdair MacIntyre

Begin by considering the intimidating range of questions about what justice requires and permits, to which alternative and incompatible answers are offered by contending individuals and groups within contemporary societies. Does justice permit gross inequality of income and ownership? Does justice require compensatory action to remedy inequalities which are the result of past injustice, even if those who pay the costs of such compensation had no part in that injustice? Does justice permit or require the imposition of the death penalty and, if so, for what offences? Is it just to permit legalized abortion? When is it just to go to war? The list of such questions is a long one.

Attention to the reasons which are adduced for offering different and rival answers to such questions makes it clear that underlying this wide diversity of judgments upon particular types of issue are a set of conflicting conceptions of justice, conceptions which are strikingly at odds with one another in a number of ways. Some conceptions of justice make the concept of desert central, while others deny it any relevance at all. Some conceptions appeal to inalienable human rights, others to some notion of social contract, and others again to a standard of utility. Moreover, the rival theories of justice which embody these rival conceptions also give expression to disagreements about the relationship of justice to other human goods, about the kind of equality which justice requires, about the range of transactions and persons to which considerations of justice are relevant, and about whether or not a knowledge of justice is possible without a knowledge of God's law.

So those who had hoped to discover good reasons for making this rather than that judgment on some particular type of issue--by moving from the arenas in which in everyday social life groups and individuals quarrel about what it is just to do in particular cases over to the realm of theoretical enquiry, where systematic conceptions of justice are elaborated and debated--will find that once again they have entered upon a scene of radical conflict. What this may disclose to them is not only that our society is one not of consensus, but of division and conflict, at least so far as the nature of justice is concerned, but also that to some degree that division and conflict is within themselves. For what many of us are educated into is, not a coherent way of thinking and judging, but one constructed out of an amalgam of social and cultural fragments inherited both from different traditions from which our culture was originally derived (Puritan, Catholic, Jewish) and from different stages in and aspects of the development of modernity (the French Enlightenment, the Scottish Enlightenment, nineteenth-century economic

liberalism, twentieth-century political liberalism). So often enough in the disagreements which emerge within ourselves, as well as in those which are matters of conflict between ourselves and others, we are forced to confront the question: How ought we to decide among the claims of rival and incompatible accounts of justice competing for our moral, social, and political allegiance?

It would be natural enough to attempt to reply to this question by asking which systematic account of justice we would accept if the standards by which our actions were guided were the standards of rationality. To know what justice is, so it may seem, we must first learn what rationality in practice requires of us. Yet someone who tries to learn this at once encounters the fact that disputes about the nature of rationality in general and about practical rationality in particular are apparently as manifold and as intractable as disputes about justice. To be practically rational, so one contending party holds, is to act on the basis of calculations of the costs and benefits to oneself of each possible alternative course of action and its consequences. To be practically rational, affirms a rival party, is to act under those constraints which any rational person, capable of an impartiality which accords no particular privileges to one's own interests, would agree should be imposed. To be practically rational, so a third party contends, is to act in such a way as to achieve the ultimate and true good of human beings. So a third level of difference and conflict appears.

One of the most striking facts about modern political orders is that they lack institutionalized forums within which these fundamental disagreements can be systematically explored and charted, let alone there being any attempt made to resolve them. The facts of disagreement themselves frequently go unacknowledged, disguised by a rhetoric of consensus. And when on some single, if complex issue, as in the struggles over the Vietnam war or in the debates over abortion, the illusions of consensus on questions of justice and practical rationality are for the moment fractured, the expression of radical disagreement is institutionalized in such a way as to abstract that single issue from those background contexts of different and incompatible beliefs from which such disagreements arise. This serves to prevent, so far as is possible, debate extending to the fundamental principles which inform those background beliefs.

Private citizens are thus for the most part left to their own devices in these matters. Those of them who do not, very understandably, abandon any attempt to think through such issues systematically are generally able to discover only two major types of resource: those provided by the enquiries and discussions of modern academic philosophy and those provided by more or less organized communities of shared belief, such as churches or sects, religious and nonreligious, or certain kinds of political association. What do these resources in fact afford?

Modern academic philosophy turns out by and large to provide means for a more accurate and informed definition of disagreement rather than for progress toward its resolution. Professors of philosophy who concern themselves with questions of justice and of practical rationality turn out to disagree with each other as sharply, as variously, and, so it seems, as irremediably upon how such questions are to be answered as anyone else. They

do indeed succeed in articulating the rival standpoints with greater clarity, greater fluency, and a wider range of arguments than do most others, but apparently little more than this. And, upon reflection, we should perhaps not be surprised.

Consider, for example, one at first sight very plausible philosophical thesis about how we ought to proceed in these matters if we are to be rational. Rationality requires, so it has been argued by a number of academic philosophers, that we first divest ourselves of allegiance to any one of the contending theories and also abstract ourselves from all those particularities of social relationship in terms of which we have been accustomed to understand our responsibilities and our interests. Only by so doing, it has been suggested, shall we arrive at a genuinely neutral, impartial, and, in this way, universal point of view, freed from the partisanship and the partiality and onesidedness that otherwise affect us. And only by so doing shall we be able to evaluate the contending accounts of justice rationally.

One problem is that those who agree about this procedure then proceed to disagree about what precise conception of justice it is which is as a result to be accounted rationally acceptable. But even before *that* problem arises, the question has to be asked whether, by adopting this procedure, key questions have not been begged. For it can be argued and it has been argued that this account of rationality is itself contentious in two related ways: its requirement of disinterestedness in fact covertly presupposes one particular partisan type of account of justice, that of liberal individualism, which it is later to be used to justify, so that its apparent neutrality is no more than an appearance, while its conception of ideal rationality as consisting in the principles which a socially disembodied being would arrive at illegitimately ignores the inescapably historically and socially context-bound character which any substantive set of principles of rationality, whether theoretical or practical, is bound to have.

Fundamental disagreements about the character of rationality are bound to be peculiarly difficult to resolve. For already in initially proceeding in one way rather than another to approach the disputed questions, those who so proceed will have had to assume that these particular procedures are the ones which it is rational to follow. A certain degree of circularity is ineliminable. And so when disagreements between contending views are sufficiently fundamental, as they are in the case of those disagreements about practical rationality in which the nature of justice is at stake, those disagreements will extend even to the answers to the question of how to proceed in order to resolve those same disagreements.

Aristotle argued in Book Gamma of the *Metaphysics* that anyone who denies that basic law of logic, the law of noncontradiction, and who is prepared to defend his or her position by entering into argumentative debate, will in fact be unable to avoid relying upon the very law which he or she purports to reject. And it may be that for other laws of logic parallel defenses can be constructed. But even if Aristotle was successful, and I believe that he was, in showing that no one who understands the laws of logic can remain rational while rejecting them, observance of the laws of logic is only a necessary and not a sufficient condition for rationality, whether theoretical or practical. It is on what has to

be added to observance of the laws of logic to justify ascriptions of rationality--whether to oneself or to others, whether to modes of enquiry or to justifications of belief, or to courses of action and their justification--that disagreement arises concerning the fundamental nature of rationality and extends into disagreement over how it is rationally appropriate to proceed in the face of these disagreements. So the resources provided by modern academic philosophy enable us to redefine, but do not themselves seem to resolve the problems of those confronting the rival claims upon their allegiance that are made by protagonists of conflicting accounts of justice and of practical rationality.

The only other type of resource generally available in our society to such persons is that which is supplied by participation in the life of one of those groups whose thought and action are informed by some distinctive profession of settled conviction with regard to justice and to practical rationality. Those who resorted or resort to academic philosophy hoped or hope to acquire thereby a set of sound arguments by means of which they could assure themselves and others of the rational justification for their views. Those who resort instead to a set of beliefs embodied in the life of a group put their trust in persons rather than in arguments. In doing so they cannot escape the charge of a certain arbitrariness in their commitments, a charge, however, which tends to carry little weight with those against whom it is directed. Why does that charge carry so little weight?

Partly it is a matter of a general cynicism in our culture about the power or even the relevance of rational argument to matters sufficiently fundamental. Fideism has a large, not always articulate, body of adherents, and not only among the members of those Protestant churches and movements which openly proclaim it; there are plenty of secular fideists. And partly it is because of a strong and sometimes justified suspicion by those against whom the charge is leveled that those who level it do so, not so much because they themselves are genuinely moved by rational argument, as because by appealing to argument they are able to exercise a kind of power which favors their own interests and privileges, the interests and privileges of a class which has arrogated the rhetorically effective use of argument to itself for its own purposes.

Arguments, that is to say, have come to be understood in some circles not as expressions of rationality, but as weapons, the techniques for deploying which furnish a key part of the professional skills of lawyers, academics, economists, and journalists who thereby dominate the dialectically unfluent and inarticulate. There is thus a remarkable concordance in the way in which apparently very different types of social and cultural groups envisage each other's commitments. To the readership of the *New York Times*, or at least to that part of it which shares the presuppositions of those who write that parish magazine of affluent and self-congratulatory liberal enlightenment, the congregations of evangelical fundamentalism appear unfashionably unenlightened. But to the members of those congregations that readership appears to be just as much a community of prerational faith as they themselves are but one whose members, unlike themselves, fail to recognize themselves for what they are, and hence are in no position to level charges of irrationality at them or anyone else.

We thus inhabit a culture in which an inability to arrive at agreed rationally justifiable conclusions on the nature of justice and practical rationality coexists with appeals by contending social groups to sets of rival and conflicting convictions unsupported by rational justification. Neither the voices of academic philosophy, nor for that matter of any other academic discipline, nor those of the partisan subcultures, have been able to provide for ordinary citizens a way of uniting conviction on such matters with rational justification. Disputed questions concerning justice and practical rationality are thus treated in the public realm, not as matter for rational enquiry, but rather for the assertion and counterassertion of alternative and incompatible sets of premises.

How did this come to be the case? The answer falls into two parts, each having to do with the Enlightenment and with its subsequent history. It was a central aspiration of the Enlightenment, an aspiration the formulation of which was itself a great achievement, to provide for debate in the public realm standards and methods of rational justification by which alternative courses of action in every sphere of life could be adjudged just or unjust, rational or irrational, enlightened or unenlightened. So, it was hoped, reason would displace authority and tradition. Rational justification was to appeal to principles undeniable by any rational person and therefore independent of all those social and cultural particularities which the Enlightenment thinkers took to be the mere accidental clothing of reason in particular times and places. And that rational justification could be nothing other than what the thinkers of the Enlightenment had said that it was came to be accepted, at least by the vast majority of educated people, in post-Enlightenment cultural and social orders.

Yet both the thinkers of the Enlightenment and their successors proved unable to agree as to what precisely those principles were which would be found undeniable by all rational persons. One kind of answer was given by the authors of the *Encyclopedie*, a second by Rousseau, a third by Bentham, a fourth by Kant, a fifth by the Scottish philosophers of common sense and their French and American disciples. Nor has subsequent history diminished the extent of such disagreement. It has rather enlarged it. Consequently, the legacy of the Enlightenment has been the provision of an ideal of rational justification which it has proved impossible to attain. And hence in key part derives the inability within our culture to unite conviction and rational justification. Within that kind of academic philosophy which is the heir to the philosophies of the Enlightenment enquiry into the nature of rational justification has continued with ever-increasing refinement and undiminishing disagreement. In cultural, political, moral, and religious life post-Enlightenment conviction effectively has acquired a life of its own, independent of rational enquiry.

It is therefore worth asking whether the Enlightenment may not have contributed to our present condition in a second way, not only by what its achievements in propagating its distinctive doctrines led to, but also by what it succeeded in excluding from view. Is there some mode of understanding which could find no place in the Enlightenment's vision of the world by means of which the conceptual and theoretical resources can be provided for reuniting conviction concerning such matters as justice on the one hand and rational enquiry and justification on the other? It will be important in trying to answer this

question not to trap ourselves by, perhaps inadvertently, continuing to accept the standards of the Enlightenment. We already have the best of reasons for supposing that those standards cannot be met, and we know in advance, therefore, that from the standpoint of the Enlightenment and its successors any account of an alternative mode of understanding will inescapably be treated as one more contending view, unable to vindicate itself conclusively against its Enlightenment rivals. Any attempt to provide radically different alternative standpoint is bound to be found rationally unsatisfactory in a variety of ways from the standpoint of the Enlightenment itself. Hence it is inevitable that such an attempt should be unacceptable to and rejected by those whose allegiance is to the dominant intellectual and cultural modes of the present order. At the same time, since what will be introduced will be a set of claims concerning rational justification and its requirements, those whose nonrational convictions flout any such requirement will be equally apt to be offended.

Is there, then, such an alternative mode of understanding? Of what did the Enlightenment deprive us? What the Enlightenment made us for the most part blind to and what we now need to recover is, so I shall argue, a conception of rational enquiry as embodied in a tradition, a conception according to which the standards of rational justification themselves emerge from and are part of a history in which they are vindicated by the way in which they transcend the limitations of and provide remedies for the defects of their predecessors within the history of that same tradition. Not all traditions, of course, have embodied rational enquiry as a constitutive part of themselves; and those thinkers of the Enlightenment who dismissed tradition because they took it to be the antithesis of rational enquiry were in some instances in the right. But in so doing they obscured from themselves and others the nature of some at least of the systems of thought which they so vehemently rejected. Nor was this entirely their fault.

To those who inhabit a social and intellectual tradition in good working order the facts of tradition, which are the presupposition of their activities and enquiries, may well remain just that, unarticulated presuppositions which are never themselves the objects of attention and enquiry. Indeed, generally only when traditions either fail and disintegrate or are challenged do their adherents become aware of them as traditions and begin to theorize about them. So the claim that most of the major moral and metaphysical thinkers of the ancient, medieval, and even the early modern world are only to be understood adequately when placed in the context of traditions, of which rational enquiry was a central and constitutive part, does not in any way involve the claim that these thinkers were themselves concerned with, let alone provide an adequate account of, the nature of such traditions. Those thinkers who are explicitly concerned with tradition as their subject matter are generally later thinkers, such as Edmund Burke and John Henry New-man, who already in some way or other are or have been alienated from those traditions about which they theorize. Burke theorized shoddily, Newman theorized with insight, but both did so in an awareness of a sharp antithesis between tradition and something else, an antithesis which was unavailable to the earlier inhabitants of the kind of tradition with which I am concerned.

The concept of a kind of rational inquiry which is inseparable from the intellectual and social tradition in which it is embodied will be misunderstood unless four considerations are borne in mind. The first has already been touched upon: the concept of rational justification which is at home in that form of enquiry is essentially historical. To justify is to narrate how the argument has gone so far. Those who construct theories within such a tradition of enquiry and justification often provide those theories with a structure in terms of which certain theses have the status of first principles; other claims within such a theory will be justified by derivation from these first principles. But what justifies the first principles themselves, or rather the whole structure of theory of which they are a part, is the rational superiority of that particular structure to all previous attempts within that particular tradition to formulate such theories and principles; it is not a matter of those first principles being acceptable to all rational persons whatsoever--unless we were to include in the condition of being a rational person an apprehension of and identification with the kind of history whose culmination is the construction of this particular theoretical structure, as perhaps Aristotle, for example, in some measure did.

Second, not only is the mode of rational justification within such traditions very different from that of the Enlightenment. What it is that has to be justified is also conceived very differently. What contend, according to the theories of the Enlightenment, are rival doctrines, doctrines which may as a matter of fact have been elaborated in particular times and places, but whose content and whose truth or falsity, whose possession or lack of rational justification, is quite independent of their historical origin. On this view the history of thought in general, and of philosophy in particular, is a discipline quite distinct from those enquiries concerned with what are taken to be the timeless questions of truth and rational justification. Such history concerns who said or wrote what, which arguments were as a matter of fact adduced for or against certain positions, who influenced whom, and so on.

By contrast from the standpoint of tradition-constituted and tradition-constitutive enquiry, what a particular doctrine claims is always a matter of how precisely it was in fact advanced, of the linguistic particularities of its formulation, of what in that time and place had to be denied, if it was to be asserted, of what was at that time and place pre supposed by its assertion, and so on. Doctrines, theses, and arguments all have to be understood in terms of historical context. It does not, of course, follow that the same doctrine or the same arguments may not reappear in different contexts. Nor does it follow that claims to timeless truth are not being made. It is rather that such claims are being made for doctrines whose formulation is itself time-bound and that the concept of timelessness is itself a concept with a history, one which in certain types of context is not at all the same concept that it is in others.

So rationality itself, whether theoretical or practical, is a concept with a history: indeed, since there are a diversity of traditions of enquiry, with histories, there are, so it will turnout, rationalities rather than rationality, just as it will also turn out that there are justices rather than justice. And it is at this point that a third consideration has to be borne in mind, for it is on this that the adherents of the Enlightenment will understandably fasten. You reproach us, so those adherents will say, with an inability to resolve the

disagreements between rival claims concerning principles to which any rational person must assent.. But you are instead going to confront us with a diversity of traditions, each with its own specific mode of rational justification. And surely the consequence must be a like inability to resolve radical disagreement.

To this the proponent of the rationality of traditions has a twofold reply: that once the diversity of traditions has been properly characterized, a better explanation of the diversity of standpoints is available than either the Enlightenment or its heirs can provide; and that acknowledgment of the diversity of traditions of enquiry, each with its own specific mode of rational justification, does not entail that the differences between rival and incompatible traditions cannot be rationally resolved. How and under what conditions they can be so resolved is something only to be understood after a prior understanding of the nature of such traditions has been achieved. From the standpoint of traditions of rational enquiry the problem of diversity is not abolished, but it is transformed in a way that renders it amenable of solution.

Finally, it is crucial that the concept of tradition-constituted and tradition-constitutive rational enquiry cannot be elucidated apart from its exemplifications, something which I take to be true of all concepts, but something which it is more important not to neglect in some cases than in others. The four traditions which in this book are used to exemplify that concept are important for more than one reason. Each is part of the background history of our own culture. Each carries within itself a distinctive type of account of justice and of practical rationality. Each has entered into relationships of antagonism or of alliance and even synthesis, or of both successively, with at least one of the others. Yet at the same time they exhibit very different patterns of development.

So the Aristotelian account of justice and of practical rationality emerges from the conflicts of the ancient *polis*, but is then developed by Aquinas in a way which escapes the limitations of the *polis*. So the Augustinian version of Christianity entered in the medieval period into complex relationships of antagonism, later of synthesis, and then of continuing antagonism to Aristotelianism. So in a quite different later cultural context Augustinian Christianity, now in a Calvinist form, and Aristotelianism, now in a Renaissance version, entered into a new symbiosis in seventeenth-century Scotland, so engendering a tradition which at its climax of achievement was subverted from within by Hume. And so finally modern liberalism, born of antagonism to all tradition, has transformed itself gradually into what is now clearly recognizable even by some of its adherents as one more tradition.

That there are other bodies of tradition-constituted enquiry which not only merit attention in their own right but whose omission will leave my argument significantly incomplete is undeniable. Three in particular have to be mentioned. The derivation of Augustinian Christianity from its biblical sources is a story whose counterpart is the history of Judaism, within which the relationship of the devoted study of the Torah to philosophy engendered more than one tradition of enquiry. But of all the histories of enquiry this is the one which, perhaps more than any other, must be written by its own adherents; in particular for an Augustinian Christian, such as myself, to try to write it, in the way that I

have felt able to write the history of my own tradition, would be a gross impertinence. Christians need badly to listen to Jews. The attempt to speak for them, even on behalf of that unfortunate fiction, the so-called Judeo-Christian tradition, is always deplorable.

Second, I have tried to give Hume his due in respect of his accounts of justice and of the place of reasoning in the genesis of action. Had I tried to do the same for Kant, this book would have become impossibly long. But the whole Prussian tradition in which public law and Lutheran theology were blended, a tradition which Kant, Fichte, and Hegel tried but failed to universalize, is clearly of the same order of importance as the Scottish tradition of which I *have* given an account. So that once again more needs to be done.

Third, and at least as important, Islamic thought requires treatment not only for its own sake but also because of its large contribution to the Aristotelian tradition, but this too I have had to omit. And, finally, the kind of story which I shall try to tell requires as its complement not only Jewish, Islamic, and other postbiblical narratives, but also the narratives of such sharply contrasting traditions of enquiry as those engendered in India and China. Acknowledgment of such incompleteness does nothing to correct it, but at least it clarifies the limitations of my enterprise.

That enterprise by its very nature has to take, initially at least, a narrative form. What a tradition of enquiry has to say, both to those within and to those outside it, cannot be disclosed in any other way. To be an adherent of a tradition is always to enact some further stage in the development of one's tradition; to understand another tradition is to attempt to supply, in the best terms imaginatively and conceptually available to one--and later we shall see what problems can arise over this--the kind of account which an adherent would give. And since within any well-developed tradition of enquiry the question of precisely how its history up to this point ought to be written is characteristically one of those questions to which different and conflicting answers may be given within the tradition, the narrative task itself generally involves participation in conflict. It is therefore with an emphasis upon the necessary place of conflict within traditions that I have to begin.

Social Justice from the Socialist Perspective: David Schweickart on Marx

David Schweickart

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On his tombstone, in Highgate Cemetery, London, are inscribed two lines Marx had written at age twenty-seven: "Philosophers have interpreted the world in various ways. The point, however, is to change it."

In the many volumes of his writing, Karl Marx rarely mentions "justice." He never subjects the concept to analysis, nor sets out anything that might be called "a theory of justice." Indeed, particularly in his mature works, Marx expresses a deep skepticism concerning the efficacy of moral criticism in changing the world.

Yet it is impossible to read anything by Marx and not sense his moral outrage, however careful he is to maintain an air of scientific detachment. For Marx there is something very, very wrong with the modern world. It is not just the poverty or the inequality or the widespread economic insecurity. These phenomena are mere symptoms. The problem is deeper than that. It cuts to the heart of what it means to be a human being.

Perhaps the best place to gain insight into Marx's fundamental conviction is an essay he wrote in 1844, at age twenty-six, the one we now call "Estranged Labour," or, in other translations, "Alienated Labor." "Essay" is perhaps the wrong term, since this piece was not written with an external audience in mind, nor polished for publication. It is an attempt at self-clarification, an extended entry in one of the notebooks Marx was keeping at the time.

These *Economic and Philosophical Manuscripts of 1844* were not published until 1932. One cannot but wonder: had these writings, which reveal so much of the ethical, humanist dimension of Marx's thought, been published earlier, the scientistic dogmatism of Soviet Marxism, which had such impact on subsequent communist movements, might not have taken such deep root.

The language Marx employs here is abstract and dense, but the referents of the concepts are quite concrete. The reader would do well to think of concrete examples when trying to grasp Marx's sense.

The essay itself has a straightforward structure. The young Marx has been studying political economy. He, like the economists, is struggling to make sense of the new

economic order that has replaced the old feudal system in Europe. It is an order that has not yet been named, but will soon come to be called "capitalism." (Marx, you will notice, does not use this term.) These economists, Marx observes, have identified "private property" as the cornerstone of the new order, meaning, "private ownership of the means of production." Land is no longer the dominant form of property. The industrial revolution is underway. Factories, machinery, modern industry are center-stage--all of these owned by private individuals. The economists have been preoccupied with understanding how these property owners interact: how they acquire property, how they compete, how they innovate--and how these interactions sometimes lead to economic crises.

Marx insists on starting from a different point of view. What does all this look like, not from the point of the view of capital, but from the point of view of labor? How does the worker experience his world--the world of work? He experiences it, says Marx, as *alienation*. Although the material things he encounters in his daily life--food, clothing, shelter, the tools with which he works, the factory in which he works--are the products of human labor, of his own labor and the labor of others like himself, these products stand apart from him, control him, dominate him, leave him in a state of insecurity.

Marx elaborates this thought for several pages in emotionally charged, but abstract language. The reader should think of two concrete phenomena: 1) those peculiar crises known only to capitalism--crises of overproduction, and 2) the constant threat of technological displacement. Economic crises of earlier societies were crises of scarcity: drought, floods, disruption by invading armies, etc. Crises under capitalism result when workers produce too much (relative to effective demand), leading to falling prices, loss of profit, loss of jobs, hence lower demand--the now-familiar downward spiral. Supply and demand (the "market") rules. Moreover, new technologies come on line, technologies that enable us to produce more with less labor--making it possible for all of us to be better off. But all of us are *not* made better off. Many lose their jobs. Many more are compelled to work even harder. Those new machines, themselves the product of human labor, turn against the workers. There is something deeply irrational here, deeply wrong.

This form of alienation, which Marx calls *alienation from the product*, is only the first form he analyzes. We are also alienated, he says, from the *productive activity* itself. Marx conceives of work as a quintessentially human activity. We conceive of a project. We engage nature, trying to make it obey our will. In doing so, we exercise and develop our talents. We come to know who we are, of what we are capable. And yet the worker does not *experience* his activity as fulfillment. Instead, Marx writes, he feels most human when he is *not* working.

We are alienated in a third way. We are alienated from our *species-being*. This peculiar term may be taken as Marx's conception of human nature. We are the only species capable of identifying with any other member of our species (past and future as well as present), and with the species itself. We are also the only species that is *free*. We are capable of transcending our immediate biological and environmental limitations in ways that other species are not. We shape the world in accordance with our needs and beyond

our needs. We satisfy our needs in ever more ingenious ways. We create in accordance with our needs, but also in accordance with the laws of beauty.

Such is our nature, and yet the worker does not *experience* the world as a free being participating in a large, collective enterprise. He does not even experience his fellow worker as a co-creator. He is experienced as a *competitor*, ever ready to work harder for less, to steal one's job. Workers are alienated--this is the fourth form of alienation elaborated by Marx--from *one another*.

It is only after his lengthy description of the many facets of estrangement that Marx inquires into its cause. The fault lies not with the gods, he writes, nor with nature. The fault lies with man himself. More precisely, estrangement is due to the fact that the current economic order divides human beings into two great classes--those who own the means of production and those who must work for those owners.

From this analysis, Marx draws two negative conclusions.

>   1.   Poverty is not the essential problem. Merely raising wages would give us merely better paid slaves. It would not increase the human significance or dignity of labor.
>
>   2.   Inequality is not the essential problem. Equality of wages would merely make society itself an "abstract capitalist."

What then is the solution? Marx does not say. Yet the implication is obvious. *Work must be democratized.* Alienation can only be overcome when workers do not work for non-workers, but for themselves. This, I would argue, is the core of Marx's conception of justice: *economic democracy*. So long as workers lack democratic control over their places of work, and along with other workers everywhere, remain at the mercy of blind "market" forces, humanity will remain in bondage.

In Marx's view, "universal human emancipation," that is to say, *justice*, requires "the emancipation of the workers," for "the whole of human servitude is involved in the relation of the worker to production."

Suggested readings:

For an excellent anthology of Marx's early writings, which includes a detailed introductory commentary, see Erich Fromm, Marx's Concept of Man (Contiuum, 1961, 1999). This collection also includes some reminiscences on Marx by friends and family—a compelling portrait.

For a comprehensive account of Marx's conception of justice, the best treatment is Rodney Peffer, Marxism, Morality and Social Justice (Princeton University Press, 1990).

A good early survey article is William McBride, "The Concept of Justice in Marx, Engels and Others," Ethics, vol. 85, no 3 (April 1975).

Various other essays on the topic can be found in Kai Nielsen and Stephen Patten, Marx and Morality (Canadian Journal of Philosophy Supplementary Vol. 7, 1981).

Estranged Labour
Karl Marx

We have started out from the premises of political economy. We have accepted its language and its laws. We presupposed private property; the separation of labour, capital, and land, and likewise of wages, profit, and capital; the division of labour; competition; the conception of exchange value, etc. From political economy itself, using its own words, we have shown that the worker sinks to the level of a commodity, and moreover the most wretched commodity of all; that the misery of the worker is in inverse proportion to the power and volume of his production; that the necessary consequence of competition is the accumulation of capital in a few hands and hence the restoration of monopoly in a more terrible form; and that, finally, the distinction between capitalist and landlord, between agricultural worker and industrial worker, disappears and the whole of society must split into the two classes of *property owners* and propertyless *workers*.

Political economy proceeds from the fact of private property. It does not explain it. It grasps the *material* process of private property, the process through which it actually passes, in general and abstract formulae which it then takes as *laws*. It does not *Comprehend* these laws — i.e., it does not show how they arise from the nature of private property. Political economy fails to explain the reason for the division between labour and capital. For example, when it defines the relation of wages to profit, it takes the interests of the capitalists as the basis of its analysis — i.e., it assumes what it is supposed to explain. Similarly, competition is frequently brought into the argument and explained in terms of external circumstances. Political economy teaches us nothing about the extent to which these external and apparently accidental circumstances are only the expression of a necessary development. We have seen how exchange itself appears to political economy as an accidental fact. The only wheels which political economy sets in motion are *greed*, and the *war of the avaricious — Competition*.

Precisely because political economy fails to grasp the interconnections within the movement, it was possible to oppose, for example, the doctrine of competition to the doctrine of monopoly, the doctrine of craft freedom to the doctrine of the guild, and the doctrine of the division of landed property to the doctrine of the great estate; for competition, craft freedom, and division of landed property were developed and conceived only as accidental, deliberate, violent consequences of monopoly, of the guilds, and of feudal property, and not as their necessary, inevitable, and natural consequences.

We now have to grasp the essential connection between private property, greed, the separation of labour, capital and landed property, exchange and competition, value and

the devaluation of man, monopoly, and competition, etc. — the connection between this entire system of estrangement and the *money* system.

We must avoid repeating the mistake of the political economist, who bases his explanations on some imaginary primordial condition. Such a primordial condition explains nothing. It simply pushes the question into the grey and nebulous distance. It assumes as facts and events what it is supposed to deduce — namely, the necessary relationships between two things, between, for example, the division of labour and exchange. Similarly, theology explains the origin of evil by the fall of Man — i.e., it assumes as a fact in the form of history what it should explain.

We shall start out from a *actual* economic fact.

The worker becomes poorer the more wealth he produces, the more his production increases in power and extent. The worker becomes an ever cheaper commodity the more commodities he produces. The *devaluation* of the human world grows in direct proportion to the *increase in value* of the world of things. Labour not only produces commodities; it also produces itself and the workers as a *commodity* and it does so in the same proportion in which it produces commodities in general.

This fact simply means that the object that labour produces, its product, stands opposed to it as *something alien*, as a power independent of the producer. The product of labour is labour embodied and made material in an object, it is the *objectification* of labour. The realization of labour is its objectification. In the sphere of political economy, this realization of labour appears as a *loss of reality* for the worker, objectification as loss of and bondage to the object, and appropriation as estrangement, as *alienation*.

So much does the realization of labour appear as loss of reality that the worker loses his reality to the point of dying of starvation. So much does objectification appear as loss of the object that the worker is robbed of the objects he needs most not only for life but also for work. Work itself becomes an object which he can only obtain through an enormous effort and with spasmodic interruptions. So much does the appropriation of the object appear as estrangement that the more objects the worker produces the fewer can he possess and the more he falls under the domination of his product, of capital.

All these consequences are contained in this characteristic, that the worker is related to the *product of labour* as to an *alien* object. For it is clear that, according to this premise, the more the worker exerts himself in his work, the more powerful the alien, objective world becomes which he brings into being over against himself, the poorer he and his inner world become, and the less they belong to him. It is the same in religion. The more man puts into God, the less he retains within himself. The worker places his life in the object; but now it no longer belongs to him, but to the object. The greater his activity, therefore, the fewer objects the worker possesses. What the product of his labour is, he is not. Therefore, the greater this product, the less is he himself. The externalisation of the worker in his product means not only that his labour becomes an object, an *external* existence, but that it exists *outside him*, independently of him and alien to him, and

beings to confront him as an autonomous power; that the life which he has bestowed on the object confronts him as hostile and alien.

Let us now take a closer look at objectification, at the production of the worker, and the estrangement, the loss of the object, of his product, that this entails.

The workers can create nothing without nature, without the sensuous external world. It is the material in which his labour realizes itself, in which it is active and from which, and by means of which, it produces.

But just as nature provides labour with the means of life, in the sense of labour cannot live without objects on which to exercise itself, so also it provides the means of life in the narrower sense, namely the means of physical subsistence of the worker.

The more the worker appropriates the external world, sensuous nature, through his labour, the more he deprives himself of the means of life in two respects: firstly, the sensuous external world becomes less and less an object belonging to his labour, a means of life of his labour; and, secondly, it becomes less and less a means of life in the immediate sense, a means for the physical subsistence of the worker.

In these two respects, then, the worker becomes a slave of his object; firstly, in that he receives an object of labour, i.e., he receives work, and, secondly, in that he receives means of subsistence. Firstly, then, so that he can exists as a worker, and secondly as a physical subject. The culmination of this slavery is that it is only as a worker that he can maintain himself as a physical subject and only as a physical subject that he is a worker.

(The estrangement of the worker in his object is expressed according to the laws of political economy in the following way:

1. the more the worker produces, the less he has to consume;

2. the more value he creates, the more worthless he becomes;

3. the more his product is shaped, the more misshapen the worker;

4. the more civilized his object, the more barbarous the worker;

5. the more powerful the work, the more powerless the worker;

6. the more intelligent the work, the duller the worker and the more he becomes a slave of nature.)

Political economy conceals the estrangement in the nature of labour by ignoring the direct relationship between the worker (labour) ***and production***. It is true that labour produces marvels for the rich, but it produces privation for the worker. It produces palaces, but hovels for the worker. It produces beauty, but deformity for the worker. It

replaces labour by machines, but it casts some of the workers back into barbarous forms of labour and turns others into machines. It produces intelligence, but it produces idiocy and cretinism for the worker.

The direct relationship of labour to its products is the relationship of the worker to the objects of his production. The relationship of the rich man to the objects of production and to production itself is only a *consequence* of this first relationship, and confirms it. Later, we shall consider this second aspect. Therefore, when we ask what is the essential relationship of labour, we are asking about the relationship of the worker to production.

Up to now, we have considered the estrangement, the alienation of the worker, only from one aspect — i.e., ***the worker's relationship to the products of his labour***. But estrangement manifests itself not only in the result, but also in the *act of production*, within the *activity of production* itself. How could the product of the worker's activity confront him as something alien if it were not for the fact that in the act of production he was estranging himself from himself? After all, the product is simply the resume of the activity, of the production. So if the product of labour is alienation, production itself must be active alienation, the alienation of activity, the activity of alienation. The estrangement of the object of labour merely summarizes the estrangement, the alienation in the activity of labour itself.

What constitutes the alienation of labour?

Firstly, the fact that labour is *external* to the worker — i.e., does not belong to his essential being; that he, therefore, does not confirm himself in his work, but denies himself, feels miserable and not happy, does not develop free mental and physical energy, but mortifies his flesh and ruins his mind. Hence, the worker feels himself only when he is not working; when he is working, he does not feel himself. He is at home when he is not working, and not at home when he is working. His labour is, therefore, not voluntary but forced, it is *forced labour*. It is, therefore, not the satisfaction of a need but a mere *means* to satisfy needs outside itself. Its alien character is clearly demonstrated by the fact that as soon as no physical or other compulsion exists, it is shunned like the plague. External labour, labour in which man alienates himself, is a labour of self-sacrifice, of mortification. Finally, the external character of labour for the worker is demonstrated by the fact that it belongs not to him but to another, and that in it he belongs not to himself but to another. Just as in religion the spontaneous activity of the human imagination, the human brain, and the human heart, detaches itself from the individual and reappears as the alien activity of a god or of a devil, so the activity of the worker is not his own spontaneous activity. It belongs to another, it is a loss of his self.

The result is that man (the worker) feels that he is acting freely only in his animal functions — eating, drinking, and procreating, or at most in his dwelling and adornment — while in his human functions, he is nothing more than animal.

It is true that eating, drinking, and procreating, etc., are also genuine human functions. However, when abstracted from other aspects of human activity, and turned into final and exclusive ends, they are animal.

We have considered the act of estrangement of practical human activity, of labour, from two aspects:

(1) the relationship of the worker to the product of labour as an alien object that has power over him. The relationship is, at the same time, the relationship to the sensuous external world, to natural objects, as an alien world confronting him, in hostile opposition.

(2) The relationship of labour to the *act of production* within labour. This relationship is the relationship of the worker to his own activity as something which is alien and does not belong to him, activity as passivity, power as impotence, procreation as emasculation, the worker's own physical and mental energy, his personal life — for what is life but activity? — as an activity directed against himself, which is independent of him and does not belong to him. Self-estrangement, as compared with the estrangement of the object mentioned above.

We now have to derive a third feature of estranged labour from the two we have already examined.

Man is a species-being, not only because he practically and theoretically makes the species — both his own and those of other things — his object, but also — and this is simply another way of saying the same thing — because he looks upon himself as the present, living species, because he looks upon himself as a universal and therefore free being.

Species-life, both for man and for animals, consists physically in the fact that man, like animals, lives from inorganic nature; and because man is more universal than animals, so too is the area of inorganic nature from which he lives more universal. Just as plants, animals, stones, air, light, etc., theoretically form a part of human consciousness, partly as objects of science and partly as objects of art — his spiritual inorganic nature, his spiritual means of life, which he must first prepare before he can enjoy and digest them — so, too, in practice they form a part of human life and human activity. In a physical sense, man lives only from these natural products, whether in the form of nourishment, heating, clothing, shelter, etc. The universality of man manifests itself in practice in that universality which makes the whole of nature his inorganic body, (1) as a direct means of life and (2) as the matter, the object, and the tool of his life activity. Nature is man's inorganic body — that is to say, nature insofar as it is not the human body. Man lives from nature — i.e., nature is his body — and he must maintain a continuing dialogue with it is he is not to die. To say that man's physical and mental life is linked to nature simply means that nature is linked to itself, for man is a part of nature.

Estranged labour not only (1) estranges nature from man and (2) estranges man from himself, from his own function, from his vital activity; because of this, it also estranges man from his species. It turns his species-life into a means for his individual life. Firstly, it estranges species-life and individual life, and, secondly, it turns the latter, in its abstract form, into the purpose of the former,also in its abstract and estranged form.

For in the first place labour, life activity, productive life itself, appears to man only as a means for the satisfaction of a need, the need to preserve physical existence. But productive life is species-life. It is life-producing life. The whole character of a species, its species-character, resides in the nature of its life activity, and free conscious activity constitutes the species-character of man. Life appears only as a means of life.

The animal is immediately one with its life activity. It is not distinct from that activity; it is that activity. Man makes his life activity itself an object of his will and consciousness. He has conscious life activity. It is not a determination with which he directly merges. Conscious life activity directly distinguishes man from animal life activity. Only because of that is he a species-being. Or, rather, he is a conscious being — i.e., his own life is an object for him, only because he is a species-being. Only because of that is his activity free activity. Estranged labour reverses the relationship so that man, just because he is a conscious being, makes his life activity, his *essential being*, a mere means for his *existence*.

The practical creation of an *objective world*, the fashioning of inorganic nature, is proof that man is a conscious species-being — i.e., a being which treats the species as its own essential being or itself as a species-being. It is true that animals also produce. They build nests and dwelling, like the bee, the beaver, the ant, etc. But they produce only their own immediate needs or those of their young; they produce only when immediate physical need compels them to do so, while man produces even when he is free from physical need and truly produces only in freedom from such need; they produce only themselves, while man reproduces the whole of nature; their products belong immediately to their physical bodies, while man freely confronts his own product. Animals produce only according to the standards and needs of the species to which they belong, while man is capable of producing according to the standards of every species and of applying to each object its inherent standard; hence, man also produces in accordance with the laws of beauty.

It is, therefore, in his fashioning of the objective that man really proves himself to be a species-being. Such production is his active species-life. Through it, nature appears as *his* work and his reality. The object of labour is, therefore, the objectification of the species-life of man: for man produces himself not only intellectually, in his consciousness, but actively and actually, and he can therefore contemplate himself in a world he himself has created. In tearing away the object of his production from man, estranged labour therefore tears away from him his species-life, his true species-objectivity, and transforms his advantage over animals into the disadvantage that his inorganic body, nature, is taken from him.

In the same way as estranged labour reduces spontaneous and free activity to a means, it makes man's species-life a means of his physical existence.

Consciousness, which man has from his species, is transformed through estrangement so that species-life becomes a means for him.

(3) Estranged labour, therefore, turns man's species-being — both nature and his intellectual species-power — into a being alien to him and a means of his individual existence. It estranges man from his own body, from nature as it exists outside him, from his spiritual essence, his human existence.

(4) An immediate consequence of man's estrangement from the product of his labour, his life activity, his species-being, is the estrangement of man from man. When man confront himself, he also confronts other men. What is true of man's relationship to his labour, to the product of his labour, and to himself, is also true of his relationship to other men, and to the labour and the object of the labour of other men.

In general, the proposition that man is estranged from his species-being means that each man is estranged from the others and that all are estranged from man's essence.

Man's estrangement, like all relationships of man to himself, is realized and expressed only in man's relationship to other men.

In the relationship of estranged labour, each man therefore regards the other in accordance with the standard and the situation in which he as a worker finds himself.

We started out from an economic fact, the estrangement of the worker and of his production. We gave this fact conceptual form: estranged, alienated labour. We have analyzed this concept, and in so doing merely analyzed an economic fact.

Let us now go on to see how the concept of estranged, alienated labour must express and present itself in reality.

If the product of labour is alien to me, and confronts me as an alien power, to whom does it then belong?

To a being *other* than me.

Who is this being?

The gods? It is true that in early times most production — e.g., temple building, etc., in Egypt, India, and Mexico — was in the service of the gods, just as the product belonged to the gods. But the gods alone were never the masters of labour. The same is true of nature. And what a paradox it would be if the more man subjugates nature through his labour and the more divine miracles are made superfluous by the miracles of industry, the

more he is forced to forgo the joy or production and the enjoyment of the product out of deference to these powers.

The alien being to whom labour and the product of labour belong, in whose service labour is performed, and for whose enjoyment the product of labour is created, can be none other than man himself.

If the product of labour does not belong to the worker, and if it confronts him as an alien power, this is only possible because it belongs to a man other than the worker. If his activity is a torment for him, it must provide pleasure and enjoyment for someone else. Not the gods, not nature, but only man himself can be this alien power over men.

Consider the above proposition that the relationship of man to himself becomes objective and real for him only through his relationship to other men. If, therefore, he regards the product of his labour, his objectified labour, as an alien, hostile, and powerful object which is independent of him, then his relationship to that object is such that another man — alien, hostile, powerful, and independent of him — is its master. If he relates to his own activity as unfree activity, then he relates to it as activity in the service, under the rule, coercion, and yoke of another man.

Every self-estrangement of man from himself and nature is manifested in the relationship he sets up between other men and himself and nature. Thus, religious self-estrangement is necessarily manifested in the relationship between layman and priest, or, since we are dealing here with the spiritual world, between layman and mediator, etc. In the practical, real world, self-estrangement can manifest itself only in the practical, real relationship to other men. The medium through which estrangement progresses is itself a practical one. So through estranged labour man not only produces his relationship to the object and to the act of production as to alien and hostile powers; he also produces the relationship in which other men stand to his production and product, and the relationship in which he stands to these other men. Just as he creates his own production as a loss of reality, a punishment, and his own product as a loss, a product which does not belong to him, so he creates the domination of the non-producer over production and its product. Just as he estranges from himself his own activity, so he confers upon the stranger and activity which does not belong to him.

Up to now, we have considered the relationship only from the side of the worker. Later on, we shall consider it from the side of the non-worker.

Thus, through estranged, alienated labour, the worker creates the relationship of another man, who is alien to labour and stands outside it, to that labour. The relation of the worker to labour creates the relation of the capitalist — or whatever other word one chooses for the master of labour — to that labour. Private property is therefore the product, result, and necessary consequence of alienated labour, of the external relation of the worker to nature and to himself.

Private property thus derives from an analysis of the concept of alienated labour — i.e., alienated man, estranged labour, estranged life, estranged man.

It is true that we took the concept of alienated labour (alienated life) from political economy as a result of the movement of private property. But it is clear from an analysis of this concept that, although private property appears as the basis and cause of alienated labour, it is in fact its consequence, just as the gods were originally not the cause but the effect of the confusion in men's minds. Later, however, this relationship becomes reciprocal.

It is only when the development of private property reaches its ultimate point of culmination that this, its secret, re-emerges; namely, that is

(a) the product of alienated labour, and

(b) the means through which labour is alienated, the realization of this alienation.

This development throws light upon a number of hitherto unresolved controversies.

(1) Political economy starts out from labour as the real soul of production and yet gives nothing to labour and everything to private property. Proudhon has dealt with this contradiction by deciding for labour and against private property. But we have seen that this apparent contradiction is the contradiction of *estranged labour* with itself and that political economy has merely formulated laws of estranged labour.

It, therefore, follows for us that wages and private property are identical: for there the product, the object of labour, pays for the labour itself, wages are only a necessary consequence of the estrangement of labour; similarly, where wages are concerned, labour appears not as an end in itself but as the servant of wages. We intend to deal with this point in more detail later on: for the present we shall merely draw a few conclusions.

An enforced rise in wages (disregarding all other difficulties, including the fact that such an anomalous situation could only be prolonged by force) would therefore be nothing more than better pay for slaves and would not mean an increase in human significance or dignity for either the worker or the labour.

Even the equality of wages, which Proudhon demands, would merely transform the relation of the present-day worker to his work into the relation of all men to work. Society would then be conceived as an abstract capitalist.

Wages are an immediate consequence of estranged labour, and estranged labour is the immediate cause of private property. If the one falls, then the other must fall too.

(2) It further follows from the relation of estranged labour to private property that the emancipation of society from private property, etc., from servitude, is expressed in the *political* form of the *emancipation of the workers*. This is not because it is only a question

of *their* emancipation, but because in their emancipation is contained universal human emancipation. The reason for this universality is that the whole of human servitude is involved in the relation of the worker to production, and all relations of servitude are nothing but modifications and consequences of this relation.

Just as we have arrived at the concept of *private property* through an analysis of the concept of *estranged, alienated labour*, so with the help of these two factors it is possible to evolve all economic categories, and in each of these categories — e.g., trade, competition, capital, money — we shall identify only a particular and developed expression of these basic constituents.

But, before we go on to consider this configuration, let us try to solve two further problems.

(1) We have to determine the general nature of private property, as it has arisen out of estranged labour, in its relation to truly human and social property.

(2) We have taken the *estrangement of labour*, its *alienation*, as a fact and we have analyzed that fact. How, we now ask, does *man* come to *alienate* his labour, to estrange it? How is this estrangement founded in the nature of human development? We have already gone a long way towards solving this problem by *transforming* the question of the *origin of private property* into the question of the relationship of alienated labour to the course of human development. For, in speaking of private property, one imagines that one is dealing with something external to man. In speaking of labour, one is dealing immediately with man himself. This new way of formulating the problem already contains its solution.

ad (1): *The general nature of private property and its relationship to truly human property*.

Alienated labour has resolved itself for us into two component parts, which mutually condition one another, or which are merely different expressions of one and the same relationship. Appropriation appears as *estrangement*, as *alienation*; and *alienation* appears as *appropriation*, estrangement as true *admission to citizenship*.

We have considered the one aspect — alienated labour in relation to the worker himself — i.e., *the relation of alienated labour to itself*. And as product, as necessary consequence of this relationship, we have found the property relation of the non-worker to the worker and to labour. Private property as the material, summarized expression of alienated labour embraces both relations — the relation of the worker to labour and to the product of his labour and the non-workers, and the relation of the non-worker to the worker and to the product of his labour.

We have already seen that, in relation to the worker who appropriates nature through his labour, appropriation appears as estrangement, self-activity as activity for another and of another, vitality as a sacrifice of life, production of an object as loss of that object to an

alien power, to an *alien* man. Let us now consider the relation between this man, who is *alien* to labour and to the worker, and the worker, labour, and the object of labour.

The first thing to point out is that everything which appears for the worker as an activity of alienation, of estrangement, appears for the non-worker as a situation of alienation, of estrangement.

Secondly, the real, practical attitude of the worker in production and to the product (as a state of mind) appears for the non-worker who confronts him as a theoretical attitude.

Thirdly, the non-worker does everything against the worker which the worker does against himself, but he does not do against himself what he does against the worker.

Let us take a closer look at these three relationships.

[First Manuscript breaks off here.]

Faith And Social Justice

Introduction by Michael Maher

This is an original piece written for *Just Readings* and was first posted on the Internet April 10, 2005.

Loyola University Chicago is often described as a "home for all faiths." A look around the university and around the Ministry Center makes this clear. Diversity of faith is not simply tolerated at Loyola; rather, it is celebrated. This "celebration" involves the academic life of Loyola as well as life outside the classroom. In 1990, Pope John Paul II wrote, "A specific part of a Catholic University's task is to promote dialogue between faith and reason, so that it can be seen more profoundly how faith and reason bear harmonious witness to the unity of all truth" (*Ex Corde Ecclesiae*). As a Catholic university, Loyola takes the issues of faith seriously, and publicly. Faith is not simply a private matter, but is part of the public discourse. Most importantly, it is part of the academic discourse. Loyola's faculty and areas of study in the Department of Theology demonstrate this, as is made clear in the following contributions.

The Historical Jesus and the Kingdom of God, Becoming

Wendy Cotter, c.s.j.

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Biblical passages here are taken from the *New Revised Standard Version Bible*. They are reprinted here with permission of the publisher (www.nccusa.org/newbtu/permiss.html).

For the Christian, it is the person of Jesus, his example and teachings that shape the disciple's imagination, form his or her attitudes, engender the dreams and inspire the enterprises to participate in helping to bring about God's kingdom on earth.

Our best source for the imagination of the historical Jesus is really the legacy of parables and remembered sayings, images that his earliest followers recalled, whether they understood them fully or not. One of the ways scholars identify the historical Jesus sayings, as distinct from later meditations woven into the text for pastoral reasons, is the criterion of "dissimilarity." This criterion eliminates conventional ideas available to everyone in the culture, and also ideas that would be convenient catechetical material from the Churches. Those images, which stand apart from society norms, and which proved challenging even to the churches, these sayings are those scholars test further as possible historical Jesus sayings. In this article, only the sayings that have been attributed to the historical Jesus form the texts for our discussion of Jesus' ideas of God and our relationship with God, and the character of God's kingdom.

One of the most dissimilar ideas is Jesus' dream of peoples of the whole earth coming together, without any divisions of class or status, or separations of any kind, to celebrate God's presence, in expressions of joy and loving concern for each person: it is the image of the banquet or feast. This is an extraordinary idea in a world that was so characterized by stratification of every kind, and rules relative to proper social connections, and one's class, status, and political rank. Certainly, many people enjoyed belonging to a club or association in which people of various classes might belong, but to imagine a world devoid of special privilege and patrician elevation, this would have been impossible to image for most people, and absolutely undesirable to the elites.

Jesus' ideal is the found in the climax of The Parable of the Banquet. This account traveled to the gospels of Matthew and Luke from the old Sayings Source (Q). Since

Matthew has edited the parable extensively for his own theology (Matthew 22:1-14), the older version preserved in Luke is used here:

> A man once gave a great banquet and invited many; and at the time of the banquet he sent his servant to say to those who had been invited, "Come, for all is now ready." But they all alike began to make excuses. The first said to him, "I have bought a field, and must go out and see it; I pray you, have me excused." And another said, "I have bought five yoke of oxen, and I go to examine them; I pray you have me excused." And another said, "I have married a wife, and therefore, I cannot come." So the servant came and reported this to his master. Then the householder in anger said to his servant, "Go out quickly to the streets and lanes of the city, and bring in the poor and maimed and blind and lame." And the servant said, "Sir, what you commanded has been done, and there is still room." And the master said to the servant, "Go out to the highways and hedges, and compel people to come in, that my house may be filled. For I tell you, none of those who were invited shall taste my banquet" (Luke 14:16-24).

In this parable that comes from the imagination of Jesus, this man was planning a conventional type of banquet, inviting friends. But then, he presents every host's nightmare: the guests begin to back out at the last minute. Of course there is a good deal of justified anger on the part of the householder, especially when the superficial character of these excuses and their carelessness express such disrespect of him. And what is to be done with food enough for "a great banquet" all ready to be served? In our own day, the host would probably box it up and have it taken to local food pantries for the poor. An option like this was also available to people in Jesus' society. Gifts of food were often taken to the city square and distributed to the needy who were waiting there, the crippled and blind beggars and the homeless.

However, this host was determined to have the party! He had his servants go and gather up all those people from the streets, alleys and side streets. We can see the servants bringing in the deformed, guiding blind people, half carrying cripples, leading in the hesitant homeless. Was the audience listening to this parable shuddering to think of those filthy and lice ridden people gathered in the splendor of the householder's banquet hall? With room still to spare, the master thinks of whom else will be handy and not otherwise occupied. Why not the transients on the roadways? Here we can see the eyebrows of the audience raise at the prospect of complete strangers being trusted as guests for this lavish banquet. Thus, the banquet hall is finally filled with guests, but guests that society would classify as the most worthless, disgusting and "cursed." But the householder does not seem to care at all. He is determined to celebrate. For a party is not just a plate of food handed to someone. It is a gathering for joyful conversation, entertainment, and every sign of welcome and special appreciation.

With this surprise in the story, Jesus presents a situation that breaks all society's rules about proper dining and proper divisions of people. Certainly, at a banquet in Jesus' day, the location of a person's place in relation to the head of the feast would depend on one's

relation to the family, authority over some facet of the family life, one's economic status, years of association and of course one's class. Obviously, slaves would not share couches with elite freed persons. But we do not have any sense at all that it matters if these coerced guests sit next to the Master or not!

It is true that in the early Church this parable came to be interpreted in an allegorical way, so that the guests who excused themselves were equated with Jesus' own Jewish nation who did not accept him as only Son of God, while the crippled and transient population who took their place represented the Gentiles. It is rather obvious that interpretations like this presume a time after Jesus' lifetime. Jesus told the parable, not as an allegory, but as a startling example of what he understood to be God's ideals for our dismissal of all socially fabricated divisions among people.

Some might ask why Jesus didn't simply present a householder who decided to invite the maimed and crippled to a banquet, right from the first. But this would spoil the surprise. By beginning that way, the audience would have dismissed the man as odd, outrageous in fact. As Jesus creates the story, with the man planning a banquet for ordinary friends, the audience can first relate to him. But when the guests back out the audience surely expects some idea about the distribution of food, not the welcoming of the beggars and cripples right into the hall itself in order to have the celebration anyway! It is at that moment that the listeners are shocked, and the degree of their shock will show them the distance between the imagination of Jesus, and his ideals, and their own. And this is how Jesus' parables function. In the surprise of the story, the disciple can measure how far away from the attitudes of the Master he or she is.

This ideal of the world brought together in celebration is distinctive of Jesus and separates him from such figures as John the Baptist in his Endtime preaching, as well as the Pharisees whose ideals involved strict practice of asceticism towards the things of this world for devotional reasons.

In fact in Mark 2:18, Jesus is asked, "Why do John's disciples and the disciples of the Pharisees fast, but your disciples do not fast?" A cluster of sayings follow and scholars note how these sayings turn this question so that they can explain why they, the Christian community do fast now: there is the question of whether the bridegroom's friends can fast while the bridegroom is with them (v. 19) and then the observation that the day will come when the bridegroom will be gone and they will fast then (v. 20). Not only do these apologetics for fasting show a date later than Jesus' lifetime, there is also the fact that Jesus was not known to have referred to himself as a bridegroom. Nevertheless, the question to Jesus has been allowed to stand for Jesus was known not to have taught his disciples to fast, which is tantamount to saying that Jesus himself did not fast. Something of his answer is still slightly visible in v. 19: It is inappropriate to fast when one is at a party. And here we pick up the party theme again. This time, it reflects Jesus own perception of how life here should be seen, as a gift from God, and a reason for everyone to celebrate, to put on that party attitude of good humor, extraordinary generosity, liberality, warmth and understanding with others, our brothers and sisters.

Along with Jesus' unusual idea of God' kingdom manifesting itself in a celebration of life, there is a second and connected ideal. Jesus was convinced that children are the best prophets to keep us alert to the artificiality and fakery in society. Mark 10:13-15 provides an excellent example. When adults were bringing the children to Jesus so he could bless them, the disciples rebuked them. We can see here the values and attitudes of the society I in the disciples' behaviour: children are not to interrupt the teaching of an important speaker. But Jesus is indignant. His disciples need to turn that attitude upside down: it is the adults who need to be instructed by the children. "Let the children come to me, do not hinder them; for to such belongs the kingdom of God" (v. 14). Jesus is saying that the adults, including himself, need the children, since they are still spontaneous, innocent of the duplicitous behaviour society teaches to control the poor, to muzzle feelings and frighten off protest. So, whereas in Jesus' society, it would be the archetype of the old man who is wise, to Jesus it is the child free of that duplicity.

Jesus encourages frankness and plainspoken expression in the people, reinforcing to them the truth that God longs for them to be so in all their communication. God is a parent who treasures them and they are to trust , not to fear and hide. "Ask and it will be given you; seek and you will find; knock and it will be opened to you…Or what one of you, if your child ask for bread will give a stone? Or if the child asks for a fish will give a serpent? If you then who are evil, iknow how to give good gifts to your children, how much more will your Father who is in heaven give good things to those who ask him?" (Matthew 7:7,9-11).

This is an urging to do away with the suspicion engendered by such ideas as "whom the gods wish to punish, they answer their prayers." Jesus teaches confidence in prayer, knowing God does not take advantage of our ignorance any more than these parents would do to their own children. This type of preaching is an empowerment of downtrodden people and an encouragement to their dignity, and their own vision. In politically unstable times, such teachings could be charged as seditious, an effort to "stir up the people", just as Jesus was charged with doing.

Jesus was announcing the character of God's kingdom as benevolent and caring for each person. But how could the majority of the people, poor, dominated by the elites, often sick and suffering with medical help, how could they be convinced of God's love, if both society and religious teaching claimed riches, good health, power and multiple opportunities for personal advancement were the signs of God's favour? This kind of teaching is designed to take the heart out of the poor. Jesus directly overturns this superficial and insidious propaganda, with his own teaching. "Blessed are you poor, for yours is the Kingdom of God. Blessed are you that hunger now, for you shall be satisfied. Blessed are you that weep now, for you shall laugh (Luke 6:20-21). Jesus' promises clearly show that these situation are NOT God's doing, but rather that God plans to make it up to them, and turn this all around, comforting them.

But how does God's kingdom arrive? Some scholars argue that Jesus expected a sudden arrival of the Endtime. The parables suggest that the Kingdom is already coming, already, becoming. Take for example, the twin parables, The Parable of the Mustard

Seed and the Parable of the Leaven. These two parables present the image of God's kingdom needing only a human agent to introduce it somewhere, and immediately it spreads in an uncontrollable, unstoppable manner. "What is the kingdom of God like? And to what shall I compare it? It is like a grain of mustard seed which a man took and sowed in his garden; and it grew and became a tree, and the birds of the air made nests in its branches." And again he said, "To what shall I compare the kingdom of God? It is like leaven, which a woman took and hid in three measures of flour, till it was all leavened" (Luke 13:18-21).

We can see that Jesus has chosen an image from the world of men (the farmer) and the leaven in the bread (the woman baking). In both examples, once the agent plants the seed or mixes the leaven with the flour, it is self-generating. The mustard seed parable holds an important elision of images. Mustard does not grow into a big tree, but rather just a large bush. Where we find the image of the tree in which the birds make their nests is the Book of Ezechiel, comparing Pharaoh of Egypt to a cedar of Lebanon. Just as the birds can nest in the Lebanon cedar without bending the branch, so too can multiple peoples come to Pharaoh and be fed without any diminishing of his fabulous resources (Ex 31:1-6). Mustard is not at all in the same elegant and lofty set of metaphors like a cedar tree. Mustard is a weed. Pliny the Elder and the Rabbis both warn people to be careful in planting mustard because it germinates almost immediately, and will take over the whole garden. It is almost amusing that Jesus chose the lowly mustard plant as his simile for the way the Kingdom arrives. What sets it apart is its earthy closeness to everyone, and the idea of God's presence spreading everywhere. At the same time, the parable gives to that mustard the strength of a Lebanon cedar, in that no matter how many come to dwell in God's kingdom, there is more than enough room and resources.

In the same way, yeast too is a product of the home. Neither Jewish services nor Roman ones allowed leavened bread to be offered to God, because fermentation is a process of decay. But yeasted bread is for the home and family. In this parable, the woman mixes it in three measures of flour. This recalls Sarah, who used three measures of flour in preparing the bread for the three mysterious visitors to Abraham (Gen. 18:6).

In both the case of the mustard seed and the leaven, when it is first introduced into its context is invisible. But it only takes a bit of time for them to be obvious and efficacious. These parables both promise the disciple of Jesus that the Coming Kingdom is not resting on visible results of his or her success. The Kingdom itself is alive, and spreading. It is enough for the disciple to take advantage of this or that opportunity to insert the seed, to mix in the leaven. God's tremendous force of new Life will do the rest.

The call to be part of helping the Kingdom in its Becoming sometimes brings terrible strife, persecution. How can a disciple overturn society's rules of division, its reliance of prestige, without having those forces turn to annihilate and destroy the threat? Jesus' protest in the Temple takes most of us by surprise. Yet, it shouldn't because the organization of the Temple was an enormous offense in Jesus' eyes. Rather than stand up to the injustices of social oppression, as a prophetic challenge to society, the Temple officials had incorporated society's divisions and greed into their own system. The

Temple was a microcosm of the larger abusive society. The words fashioned for Jesus express his outrage, "Is it not written, 'My house shall be called a house of prayer for all the nations?' But you have made it a robbers' den" (Mark 11:17). Jesus' denunciation of religious fakery, and its duplicity was his own expression of that childlike clarity of vision, which refused to be threatened into silent compliance.

The life, the death and the resurrection of Jesus, each element holds an important message of hope for the disciple and a call to participate in the new Life that Jesus has brought to the earth. In that grace, and guided by the teachings of Jesus, the disciples strive to participate in the Kingdom of God, Becoming.

The Concept of Justice in Judaism:
Some Brief Comments
Patti Ray

Patti Ray is the Director of Hillel at Loyola University Chicago. This is an original piece written for *Just Readings* and was first posted on the Internet April 10, 2005. Translations of passages are by the author.

One of Judaism's most foundational statements is found in Deuteronomy 16:20 - "Justice, justice you shall pursue." In his book, "Jewish Literacy," Rabbi Joseph Telushkin describes that the Torah "exhorts (this command) with extraordinary passion." The repetition of the word "justice" in this phrase is interpreted by some Jewish commentators as implying that the means as well as the ends must be just.

The primacy of social justice, of morality, was a revolutionary concept at the time the prophets were preaching this message. The good deed of the righteous man is more pleasing to God than the sacrifices of the wicked. In Judaism, what matters most to God is morality, not ritual. This is exemplified by the famous verse from Amos 5:24 - "But let justice well up as waters/And righteousness as a mighty stream."

At about the same time as Amos was proclaiming his message in the north of Israel, Isaiah was saying the same thing in Jerusalem to the people coming to sacrifice and pray to God in the Temple. In Isaiah 1:16-17 - "Cease to do evil; Learn to do well; Seek justice, relieve the oppressed, Judge the fatherless, plead for the widow." Variations of this theme are found in Hosea, Micah, Jeremiah, the Second Isaiah and Zachariah.

God, Himself, is expected to be just with the mandate of justice binding upon him as well as upon human beings. In Genesis 18:25 Abraham confronts God when he believes God is acting unjustly in regards to Sodom and Gomorrah. "Will the Judge of all the Earth not act with justice?"

The Torah's emphasis on justice affects all Jewish legislation. For example, the Talmud understand "Justice, justice you shall pursue" as offering guidance in a case where two "rights" confront each other. In such instances, the Talmud explains that justice is served by both parties compromising. A famous story from the Talmud speaks of the example of two boats which meet while sailing on a river. If both attempt to pass at the same time, both will sink. However, if one makes way for the other, both can pass without harm to either.

The whole concept of "charity" in Judaism is predicated on justice. The English word "charity" comes from the Latin "caritas," meaning "from the heart" and implies a voluntary act. The word "philanthropy," likewise, comes from a combination of two Greek roots - "philo" meaning love and "anthropos" meaning man.

However, the Hebrew word for charity is "tzedakah" and is derived from the work "tzedek" meaning justice, that which is right. In Jewish law, one who does not give charity is not just uncharitable, but unjust as well. Charity and philanthropy are motivated by an inner caring for others. Tzedakah certainly includes this feeling, but it goes further, superseding the immediate moods of the individual and demanding that even if one is not in a a particularly loving or giving mood - the "mitzvah," the obligation, to give charity is still there. From Judaism's perspective, therefore, one who gives "tzedakah" is acting justly, and one who does not is not only mean-spirited, but acting illegally.

Islam and Justice Issues
Marcia Hermansen

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The theme of justice, and in particular, social justice, is one that has been strongly emphasized in the Islamic religion from its inception. The Prophet of Islam, Muhammad (d. 632), was orphaned at an early age and perhaps this sense of loss led him to identify with the situation of those who were economically or socially less privileged. In the Prophet's own life and words and in the divine scripture, the Qur'an, which Muslims believe to be God's exact words, revealed or dictated to Muhammad, we also find repeated exhortations to justice. The scope of this call to justice includes equitable and fair transactions among human beings, gentle and kind dealings with others, and especially sympathy and protection for the weak and oppressed.

Social justice in a more activist mode is also something that most Muslims would understand as being a fundamental tenet of their faith. The injunction "command the good and forbid the wrong" (Qur'an 3:104, 3:110, 3:114 and many other verses) is extended to changing the world for the better. Those who reform or change things for the better are known as the "muslihuun" and setting things right, "islaah" is a positive value. An Islamic justice maxim based on a saying of the Prophet would be, "If you find something wrong try to change it" even if a gradualist position must be taken [Sahaih Muslim *Book 001, Number 0079:* I heard the Messenger of Allah saying: He among you who sees something evil should change it with the help of his hand; and if he has not strength enough to do it, then he should do it with his tongue, and if he has not strength enough to do even that then he should (hope it changes) in his heart, and that is the weakest type of faith].

The second normative source in Islam after the Qur'an is the Sunna, the activities and recorded injunctions of the Prophet himself, who is considered to be "the best example" (Qur'an 33:21) for humanity. The Prophet worked to transform his society. Initially his followers were a few close associates and family members. Public preaching of the new message only began by divine command after three years of incubation. Then, when the Prophet met rejection form his own privileged tribe in Mecca, he and his followers immigrated to the city of Medina where they established the first Muslim community, the umma. This new, revolutionary society in Medina constitutes an evocative model of the "ideal" human society where justice prevails and humans achieve an ideal order where both spiritual and worldly needs can be fulfilled in an optimal way.

In Medina the prophet established a new social order where tribal affiliation would no longer be the primary bond, but rather Muslims would unite as brothers and sisters within

a common commitment to the worship of God and maintaining just and humane dealings in social and family life.

The Qur'an often specifically addressees how this justice might be done in verses such as the following:
> Weigh with justice and don't give short measures (55:9)
> Don't make unjust profit by charging doubled and redoubled interest (3:130)
> Secure justice for orphans (4:127)

This banning of certain kinds of economic transactions as being essentially unjust is interpreted by some contemporary Muslims as requiring a radical critique of capitalism. Unjust economic practices are seen as underlying the imbalance of the current world order or North against South, where those already wealthy are able to manipulate large organizations and establish economic policies in order to maintain their dominance and lavish lifestyles at the expense of the world's poor.

Racial justice is proverbial in Islam. The social order in Arabia before the Prophet's time was based on tribal affiliations and loyalty. Arabian society, however, was also relatively diverse due to trade and population movements. The Prophet elevated people of various races to high positions, including Bilal, an African slave who was freed and became the first muezzin, or caller to prayer, and Zayd, an ex-slave of African origin, who Muhammad adopted as his son.

The pattern of racially integrated societies and the emphasis on meritocracy may be seen as sanctioned by the Qur'anic verse:
> We have created you from a male and a female, and made you into nations and tribes that
> you might come to know one another. The noblest of you in Allah's sight is the most
> righteous of you. Allah is wise and all knowing (49:13).

The prophet's farewell sermon also celebrated these egalitarian values.
> "O people, listen carefully, your Lord is one Lord, there is no doubt about it. Your
> ancestor, is one ancestor, there is no doubt about it. Listen well to my words: no Arab has
> any superiority over a non-Arab, and no non—Arab is superior to an Arab. No black is
> superior to a brown or red, and no white superior to any black. If there is any superiority
> in anyone it is due to his piety. 'Have I conveyed the message?' the Prophet asked the
> people. The people answered from all corners, 'Indeed so! May God be the witness.'
> Then the Prophet said: 'Let him that is present tell it unto him that is absent.'"

An issue facing Muslims today is how to interpret and continue to implement the social justice elements within the faith, notable examples being "gender" issues. Most Muslims understand the early days of Islam as being a period of great improvement for all members of society. The status of woman was elevated by such progressive measures as insuring females' right to inherit, to own and dispose of their own property, to have marriage contracts protecting their interests, and so on. In many other societies, including the United States, such legal protection for women was only realized in the modern period.

However, today gender is one area where the practices in certain Muslim societies come under criticism as violating justice principles. This critique has been both external and

internal. Focusing on the more extreme cases such as the Taliban and Saudi Arabian culture may distort the reality lived by most Muslim women. Still, it is clear than in certain issues such as a woman's right to initiate divorce proceedings, child custody, and freedom of mobility, for example being able to travel without the husband's permission, as stipulated by some of the traditional religious laws may not provide equal treatment for females.

Such cases raise interesting issues for social justice. For example, "Is equal treatment always the most just?" "Is conceiving of male and female natures as essentially different, inherently unjust?" "Did the progressive spirt of the original Islamic message become fossilized due to privileging specific human interpreters?" "Should the word of God be taken literally and regulations as established the Prophet and medieval scholars be upheld as closer to reflecting God's will?"

Another issue debated by Muslim thinkers today is, "Is the only 'just' society an 'Islamic' one?" For example, in terms of a political system, should the Islamic community under Muhammad and his immediate successors be the model for societies today, and if so, how can this be implemented i.e., can democracy be an "Islamic" system? Alternatively, perhaps religion and politics should not be so tightly linked.

All of these issues are hotly debated with Muslims being broadly divided into more literalist and conservative interpreters vs. those who favor liberal or progressive approaches to religious tradition.

In many contemporary Muslim societies Islamist movements, which are religiously conservative groups stressing personal piety and the desire to establish Islamic political systems, also have become highly involved in justice issues such as providing medical treatment, education and other services for the poor.

Major debates on Social Justice in Islam: On-Line Resources

An excellent site to research contemporary discussions in Islam is
http://www.law.harvard.edu/faculty/vogel/courses/islamic/resources/

Liberalism vs. Literalism (in interpretation)

A liberal perspective on Justice in the Qur'an is "The Qur'anic Concept of Justice" by Nasr Abu Zayd. http://www.polylog.org/them/2/fcs8-en.htm

A more conservative and apologetic perspective is "Social Justice in Islam" by Maulana Wahiduddin Khan. http://www.alrisala.org/Articles/papers/justice.htm

Gender

A conservative perspective is that of Sayyid Qutb (d. 1966) an important Islamic thinker.
http://www.nmhschool.org/tthornton/mehistorydatabase/sayyid_qutb_on_women.htm

Jamal Badawi, a contemporary Muslim apologist living in Canada wrote the following article proposing "gender equity" as an Islamic alternative to equality for males and females. http://www.iad.org/books/GEI.html

A liberal perspective, arguing that male interpreters have misread texts such as the Qur'anic creation story in a way that distorts its progressive message is offered by Riffat Hassan, a contemporary Muslim feminist.
http://ncwdi.igc.org/html/Hassan.htm

Islam and Human Rights

A conservative position is represented by Abu al-Ala Maududi (d. 1979) of Pakistan, an important conservative thinker and activist of the 20th century.
http://www.jamaat.org/islam/HumanRightsPolitical.html

A liberal view on Islam and Human Rights is offered by Ali Salman.
http://www.renaissance.com.pk/octvipo2y1.html

A general resource page on Islam and Human Rights issues (both conservative and liberal perspectives), as well as material on specific countries and cases is:
http://www1.umn.edu/humanrts/links/islam.html

Social Justice and the Hindu Scriptures

Tracy Pintchman

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The notion of "social justice" in Hinduism to be encompassed under the larger category of *dharma*. The term *dharma* comes from a Sanskrit verb meaning, "to hold up" or "to sustain." Dharma refers to righteous behavior, which in turn is believed to sustain both society and creation itself. Dharma encompasses both social and religious duty toward others. Dharma and its elements are discussed throughout Hindu scripture and are viewed as based in the Vedas, the foundational scriptures of mainstream Hinduism. But they are highlighted in the scriptures known as Dharma-Shastras, or "Teachings about dharma," along with their commentaries. The Laws of Manu (ca. 200 B.C.E.-200 C.E.) is one of the Dharma-Shastras most well-known in Western contexts. Hindu codes of *dharma* draw a distinction between Sadharana-dharma, universal ethical principles, and Svadharma, individual responsibilities that vary according to one's caste, stage of life, and gender. Sadharana-dharma includes injunctions regarding ethical behavior toward others and virtues like compassion, non-violence, and generosity. Consider this passage from the Taittiriya Upanishad, a Hindu scripture (1.11.1-3):

> Speak truth, and follow the path of righteouness. . . . consider your mother, your father, your teacher, and your guests to be God. Perform only deeds that are blameless. Esteem only the good you have seen in us, not other acts. . . Give with faith, not without faith. Give generously, modestly, fearfully, and in full knowledge and compassion.

False understanding or delusion (*moha*), greed (*lobha*), and anger (*krodha*) are considered the roots of all vice, and all deeds performed under their influence are considered sinful; hence a righteous person strives to transcend these three basic vices. Such transcendence of vice points toward the Hindu value of *moksha*, or spiritual liberation, in which a person achieves a spiritual state that enables release or liberation from all ego attachments. In Hinduism, there is one underlying divine principle, and true spiritual knowledge rests in knowing, through experience, the underlying unity of all that exists. Such experiential knowledge is essential to the achievement of liberation. Study of the tradition, cultivation of spiritual states of awareness through yoga and meditation, and self-surrender to a deity through acts and attitudes of devotion are some of the techniques that can help one progress spiritually on the path toward spiritual transcendence.

One of the most important ethical texts in Hinduism is the Bhagavad-Gita, or "Song of God." This text forms on part of the lengthy Hindu epic, the Mahabharata. The Bhagavad-Gita elaborates the discipline of action (*karma-yoga*), which entails performing righteous deeds for their own sake without attachment to the fruits of one's actions, that is, the selfish goal of one's action. The Bhagavad-Gita claims:

> Your jurisdiction lies only in action, never in the fruits of (that) action. Never should
> (attaining) the fruit of action be the motivation, nor should you be attached to non-action.
> Fixed in discipline (yoga), perform (correct) action without attachment (to the results).
> (2.47-48)

Mohandas K. (aka "Mahatma") Gandhi was a great admirer of the Bhagavad-Gita and considered himself a practitioner of the discipline of action detailed in the text. Gandhi's conviction, which he gleaned from the Bhagavad-Gita, that righteousness resides in performing righteous deeds for their own sake regardless of their results for oneself supported his campaign of active resistance to the British, which helped bring about the end of British colonial rule.

In contemporary India, one of the names most often associated with the push for social justice is Swami Agnivesh. Agnivesh is a renunciant affiliated with the Arya Samaj, a modern Hindu movement founded in 1875 that stresses righteous behavior and social justice as the essence of religion. Swami Agnivesh has been an outspoken in his firm opposition to bonded labor, discrimination against Dalits (aka, Untouchables), and oppression of women. More on the Arya Samaj and Swami Agnivesh can be found at www.aryasamaj.com and www.swamiagnivesh.com.

Social Justice and the
Buddhist Scriptures
Tracy Pintchman

Tracy Pintchman is a faculty member in the Department of Theology at Loyola University Chicago. This is an original piece written for *Just Readings* and was first posted on the Internet April 10, 2005. Translations of passages are by the author.

Buddhism comprises three distinct branches, Theravada, Mahayana, and Vajrayana, each with its own doctrinal and ritual emphases. Hence there is a great deal of diversity within Buddhism and a variety of interpretations regarding its basics. Historically, Buddhism in most of its forms has been more concerned with spiritual and ethical self-transformation, effected through meditation, spiritual exercises, and good works, than social transformation. Yet Buddhism contains tremendous resources for reflecting and acting on social justice issues, and modern Buddhism has become very much a socially engaged religion.

There are several fundamental values in Buddhism that easily lend themselves to social justice applications. Buddhism is thoroughly ethical and is mainly concerned with the elimination of suffering in all its forms, maintaining that the solution to suffering lies in the cultivation of spiritually and ethically correct attitudes and practices. Stories of the Buddha himself emphasize his selfless giving to others in the Jataka tales, stories of his former lives. The foundation of Buddhism is its insistence on four Noble Truths: life is suffering, we can identify the root cause of suffering (which is grounded primarily in spiritual ignorance and craving), suffering can be stopped, and the solution to suffering is a new way of living, embodied in the well-known eightfold path. The eight steps of the eightfold path include several injunctions concerning ethical behavior that are meant to reduce the suffering of sentient beings, including concern with right speech, right action, and right livelihood. Right speech entails that one not use speech unethically, including prescriptions that one ought not to tell lies, gossip, or indulge in abusive or harsh talk. Right action includes injunctions that one should not harm living beings, take what is not given, or behave wrongly with regard to sense pleasures. Right Livelihood entails that one not make a living by trading in weapons, intoxicants, poisons, slaves, or meat, and that one avoid all livelihoods that cause suffering to others. Four ideal qualities or "divine abidings," lie at the heart of Buddhist spiritual striving: loving kindness (*metta*), compassion (*karuna*), sympathetic joy in the happiness of others (*mudita*), and equanimity in all things (*upekkha*). Buddhism also maintains a doctrine of the radical interdependence of all living things, even to the point of denying the ultimate reality of distinct, individual essences. Buddhist beliefs and values like these above have enormous potential to lend support to social justice causes.

Buddhist scriptures contain many injunctions to perform actions that are, from the Buddhist perspective, ethically correct and compassionate. One finds such injunctions, for example, in the Dhammapada, a collection of 423 Buddhist aphorisms incorporated

into the Pali Canon, the scriptures of Theravada Buddhism. Consider the following maxims from the Dhammapada:

> All beings fear danger, and all fear death. When someone realizes this, he does not kill or cause others to kill. . .   The person who, for the sake of happiness, hurts others who also want happiness—that person will not find happiness after that. Never speak harsh words, for once they are spoken they may return to you. Angry words are painful. (10.129-133)

> The person who destroys life, who lies, who takes that which is not given to him, who goes to someone else's wife, or who gets drunk on strong drink—that person digs up the very roots of his life.   Therefore, know this: lack of self-control means wrongdoing. Watch that greed and vice don't bring you long suffering. (18.247-248).

Modern Buddhists have engaged in a process of appropriation and thoughtful rearticulation of their tradition toward contemporary justice issues and aims. This has happened in all three branches of Buddhism. In Theravada Buddhism, for example, we find the Sarvodaya Shramadana movement of Sri Lanka, founded by Ahangamane Tudor Ariyaratne in 1958 (see www.sarvodaya.org). Sarvodaya aims is to encourage every individual to work towards liberation in the Buddhist sense, embracing two kinds of freedom: freeing the mind of its limitations; and freeing the community in a non-violent way from unjust socio-economic conditions. Sarvodaya works against poverty and hardship primarily in rural areas of Sri Lanka. In Mahayana Buddhism, Masao Abe and Thich Nhat Han have actively reinterpreted Buddhism to engage justice issues. And in Vajrayana Buddhism, the Dalai Lama has brought to the world's attention the plight of the Tibetan people and has dedicated his life to working toward peace and freedom in Tibet without resorting to violent means.

The Journal of Buddhist Ethics, (http://jbe.gold.ac.uk/) is a very helpful resource for those looking to learn more about Buddhism and social justice issues.

Catholic Social Teaching

Introduction by Michael Maher

This is an original piece written for *Just Readings* and was first posted on the Internet February 20, 2004.

Given Loyola's Jesuit Catholic heritage, it is important that this reader contain a section specifically on Catholic Social Teaching. This is not to be parochial, but to place the discussion of social justice into Loyola University Chicago's history and into the very long history of Catholic higher education. The principles outlined in the first piece are widely recognized by Catholic scholars. The other two pieces give brief synopses of the foundational Catholic magisterial documents. These documents are all available within Loyola's library system in a variety of formats. *Origins*, a regular publication of the Catholic News Service available in Cudahy Library is a good source of documents that may not be separately bound. Another helpful source may be the United States Catholic Conference, which has documents on specific social issues arranged by topic on their website (www.usccb.org).

William J. Byron, S.J. on 10 Principles of Catholic Social Teaching

Rev. William J. Byron, S.J. is a former president of Catholic University and has taught at Georgetown University and Loyola College in Maryland. This selection is taken from an article in *America Magazine* titled, "Ten Building Blocks of Catholic Social Teaching" (October 31, 1998, pp. 9-12). It is reprinted here with permission of the publisher. The full article is available at the website: http://www.americamagazine.org/articles/Byron.htm

The Principle of Human Dignity

This is the bedrock principle of Catholic social teaching. Every person--regardless of race, sex, age, national origin, religion, sexual orientation, employment or economic status, health, intelligence, achievement or any other differentiating characteristic--is worthy of respect. It is not what you do or what you have that gives you a claim on respect; it is simply *being* human that establishes your dignity. Given that dignity, the human person is, in the Catholic view, never a means, always an end. The body of Catholic social teaching opens with the human person, but it does not close there. Individuals have dignity; individualism has no place in Catholic social thought. The principle of human dignity gives the human person a claim on membership in a community, the human family.

The Principle of Respect for Human Life

Human life at every stage of development and decline is precious and therefore worthy of protection and respect. It is always wrong directly to attack innocent human life. The Catholic tradition sees the sacredness of human life as part of any moral vision for a just and good society.

The Principle of Association

The centerpiece of society is the family; family stability must always be protected and never undermined. By association with others--in families and in other social institutions that foster growth, protect dignity and promote the common good--human persons achieve their fulfillment.

The Principle of Participation

Without participation, the benefits available to an individual through any social institution cannot be realized. The human person has a right not to be shut out from participating in those institutions that are necessary for human fulfillment. This principle applies in a special way to conditions associated with work. "Work is more than a way to

make a living; it is a form of continuing participation in God's creation. If the dignity of work is to be protected, then the basic rights of workers must be respected--the right to productive work, to decent and fair wages, to organize and join unions, to private property, and to economic initiative" (*Sharing Catholic Social Teaching: Challenges and Directions--Reflections of the U.S. Catholic Bishops,* USCC, 1998, p. 5).

The Principle of Preferential Protection for the Poor and Vulnerable

The opposite of rich and powerful is poor and powerless. If the good of all, the common good, is to prevail, preferential protection must move toward those affected adversely by the absence of power and the presence of privation. Otherwise the balance needed to keep society in one piece will be broken to the detriment of the whole.

The Principle of Solidarity

"Catholic social teaching proclaims that we are our brothers' and sisters' keepers, wherever they live. We are one human family.... Learning to practice the virtue of solidarity means learning that 'loving our neighbor' has global dimensions in an interdependent world" (*Sharing Catholic Social Teaching: Challenges and Directions--Reflections of the U.S. Catholic Bishops,* USCC, 1998, p. 5). The principle of solidarity functions as a moral category that leads to choices that will promote and protect the common good.

The Principle of Stewardship

The steward is a manager, not an owner. In an era of rising consciousness about our physical environment, our tradition is calling us to a sense of moral responsibility for the protection of the environment--croplands, grasslands, woodlands, air, water, minerals and other natural deposits. Stewardship responsibilities also look toward our use of our personal talents, our attention to personal health and our use of personal property.

The Principle of Subsidiarity

The principle of subsidiarity puts a proper limit on government by insisting that no higher level of organization should perform any function that can be handled efficiently and effectively at a lower level of organization by human persons who, individually or in groups, are closer to the problems and closer to the ground. Oppressive governments are always in violation of the principle of subsidiarity; overactive governments frequently violate this principle.

The Principle of Human Equality

Treating equals equally is one way of defining justice, also understood classically as rendering to each person his or her due. Underlying the notion of equality is the simple principle of fairness; one of the earliest ethical stirrings felt in the developing human person is a sense of what is "fair" and what is not.

The Principle of the Common Good

What constitutes the common good is always going to be a matter for debate. The absence of any concern for or sensitivity to the common good is a sure sign of a society in need of help. As a sense of community is eroded, concern for the common good declines. A proper communitarian concern is the antidote to unbridled individualism, which, like unrestrained selfishness in personal relations, can destroy balance, harmony and peace within and among groups, neighborhoods, regions and nations.

Mary Elsbernd, O.S.F. on
Key Social Justice Documents
of the Catholic Church
Mary Elsbernd, O.S.F.

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Rerum Novarum (Leo XIII, 1891)

RN examines the plight of the industrial worker and addresses issues of private property, wages, and the role of the state. The underlying concept of justice relies on Thomas Aquinas' description as the "what is due in a relationship of equity." The argument for "what is due" is based on arguments of duty which emerge from contracts, laws, the common good, prior natural rights, or basic bodily needs. Leo XIII noted that not all contracts or all laws are just, and consequently the obligation to justice supercedes contracts or laws. Workers have obligations to their employers and employers have obligations to their workers. The state is obliged to care for all citizens regardless of economic class. Society needs not only justice, but also charity.

Quadragesimo Anno (Pius XI, 1931)

Against the backdrop of the Great Depression, QA addressed the issues of just wages and the disparity between rich and poor. In reaction to fears of Socialism, it re-articulated a natural right to private property. It also introduced the phrase "social justice" into Catholic thought. "Social justice," as used in this document (and shaping its use in Catholic thought thereafter), refers to all the institutions, structures, and policies that promote the good of the whole. Social justice is distinct from distributive justice (the relationship of the whole to the individual), from contributive justice (the relationship of the individual to the whole) or from contractual justice (the relationships between individuals). "Social justice" is concerned with regulating policies and structures that promote or diminish the common good. Social justice focuses on structures while social charity promotes the soul of a society.

Mater Et Magistra (John XXIII, 1961)

MM addresses economic issues of wages, ownership, working conditions, economic systems, taxes, insurance, social security, imbalance, and the distribution of wealth. The document introduces a new concern, namely international economic systems. Economic systems and work itself must be shaped by respect for human dignity. On the basis of

contributive justice, John XXIII argues that just systems necessarily allow workers opportunities to contribute to the business enterprise as well as the common good.

Pacem in Terris (John XXIII, 1963)

Against the backdrop of the Cold War, Pacem in Terris turns to a political focus. Justice must regulate relationships between political entities, treatment of ethnic minorities, de-escalation of the arms race as well as the development of an international common good.

Gaudium et Spes (Vatican Council II, 1965)

GS synthesizes the contributions of earlier documents on justice. The disparity in distribution of wealth is marked as unjust. Justice requires just living conditions. Justice requires that individuals have access to the educational and social conditions that enable them to contribute to the common good. Peace is an outcome of justice, and economic justice is an international issue. Since human persons are essentially social in nature. Since human persons are essentially social in nature, justice is a requirement of human dignity. Finally just practices are understood as an expression of Christian faith.

Populorum Progressio (Paul VI, 1967)

PP focuses on the economic development of nations. Social justice is a dimension of the mission of the People of God. The document addresses structured inequality, both between nations and between individuals, especially those relationships between rich and poor nations or rich and poor individuals. Justice demands that such relationships be regulated in order to insure fairness when the poor are at a disadvantage. The document recognizes the role of nationalism and racism in structuring inequality. Justice demands regulation of nationalism and racism to insure that disadvantaged parties are not exploited.

Octagesimo Adveniens (Paul VI, 1971)

OA stresses the people to people relational dimension of justice rather than the structural or institutional dimension. The document describes stages of justice throughout human history as it moves toward the end times City of God. The image of the City of God as a place of justice attracts people toward that goal through history. Justice is also described as a yearning or thirst of the human heart for a better world.

Justice in the World (World Synod of Bishops, 1971)

JW presents a theological understanding of justice. Because the scriptures present God as the one who liberates the oppressed and defends the poor, conversion to God requires action for justice. Acting as Jesus did (identifying with the oppressed and highlighting love of God with love of neighbor), the Church's mission of salvation includes the promotion of justice. Daily human activity in pursuit of justice is tied to pursuing salvation. The whole human person and the whole world is in need of redemption,

salvation, liberation, and justice. Action on behalf of justice is differs from situation to situation and from time to time. Advocating and working toward justice will differ according to cultures and eras.

Laborem Exercens (John Paul II, 1981)

LE returns to a focus on economic justice, international relationships and systems of injustice. Topics addressed include wages, distribution of wealth, unemployment, legal protection, and ownership. Unions work to secure just wages, workers' rights and the common good of the society. Work is a universal right.

Sollicitudo Rei Socialis (John Paul II, 1987)

SRS re-visites the themes of access to the goods of the earth for all persons and the common good. It critiques the world's political systems as unjust when they thwart economic development. The document describes "structures of sin" as the cause of economic injustice, but also argues that structures of sin are created by individual acts of sin. Conversion to God remedies injustice. Solidarity with the poor and oppressed reflects the Trinitarian life and activity of God.

Centesimus Annus (John Paul II, 1991)

CA marks the 100th anniversary of *Rerum Novarum*, and also came less than two years after the collapse of the Soviet Union. Throughout history including the present, unjust structures within nations and between nations have created poverty. Thus poverty is not primarily the result of individual choices. Participation in economic life is a universal right because of the dignity of each and every human person from creation. Although both domestic and international governments provide charity for the poor, they must also provide access to the kind of economic development for persons who are poor which enables them to be active participants in economic life. This is a foundational requirement of human dignity. Unions must work to ensure the dignity of the human person. Also, repayment of international debts by poor nations to wealthy nations must take a back seat to policies that will insure human dignity and access to economic development for persons who are poor.

Claire Noonan on Key Social Justice Documents of the USCC
Claire Noonan

Claire Noonan is a chaplain with University Ministry at Loyola University Chicago. This is an original piece written for _Just Readings_ and was first posted on the Internet February 20, 2004.

The United States Catholic Bishops began applying Catholic Social Teaching to their own national context in 1919 with their Program of Social Reconstruction. Below are summaries of six of their contemporary statements. These documents were selected for summary because of their importance in the history of the American hierarchy's own thinking about social justice, and for the impact they had on the public debate. All are recommended for your own reading.

Brothers and Sisters to Us, 1979

"Racism is a sin which endures in our society and in our Church." So begins the National Conference of Catholic Bishops pastoral letter. Writing nearly 25 years after Rosa Parks refused to give up her Montgomery bus seat, the bishops issued this letter indicting both their country and their Church for personal and social sin against people of color. Insisting on racism as a fact of American life, the bishops find evidence of its destructive power in US legal, housing, educational and financial systems, in families, and in the Church. They are especially strong in drawing the connection between racism and the enduring affliction of poverty among people of color. Addressing racism and poverty with an urgent tone, the bishops fear an end to the energy for justice generated by the Civil Rights movement. Attempting to combat the "mood the indifference" about racism that had settled upon the country, the letter speaks of hope, human rights, and offers specific recommendations for redressing this sin.

The recommendations for the healing of racism in society are general goals and principles familiar to students of Catholic Social Teaching such as just wages, universal health care, and international solidarity. But the recommendations for the Church itself are specific and pointed. They include affirmative action in ecclesial employment, culturally appropriate liturgy, revision of seminary education to include multicultural history, alternative investment of capital, and affirmation of Catholic education in inner cities. Sadly, the demands of 1979 remain relevant today.

Two important documents were issued in later years as a follow-up to the pastoral letter: _What We Have Seen and Heard_ written in 1984 by the Black Bishops, and _For the Love of One Another_ written in 1989 by the Bishops' Committee on Black Catholics. All three letters remain important sources of wisdom for social analysis, pastoral planning, justice advocacy and theological inspiration.

The Challenge of Peace: God's Promise and Our Response, 1983

The Challenge of Peace is a lengthy pastoral letter in which the U.S. bishops apply the Catholic tradition's reflections on war and peace to the critical political and moral questions facing a nuclear superpower. Joseph Cardinal Bernardin of Chicago chaired the committee which drafted the letter. Under his leadership, the committee's study of the matter included public debate and examination of the pertinent issues "with the assistance of a broad spectrum of advisors of varying persuasions," (#132).   Fortified by strong messages of peace delivered by the modern papacy (Pius XII-John Paul II), and influenced by the growing movement for non-violence, Bernardin's committee would produce one of the two most important, influential and widely discussed documents to come out of the American bishops' conference. The other, *Economic Justice for All (*see below) would be released three years later, and would follow the same strategy of wide consultation in preparation. (For more information about the development of *The Challenge of Peace*, see *Catholic Social Thought: The Documentary Heritage*. Ed. David J. O'Brien and Thomas A. Shannon. Maryknoll, NY: Orbis Books, 1998.)

The bishops address themselves both to the Catholic faithful, and to the wider civil community whom they consider bound by natural law and the protection of human rights. With two overlapping audiences in mind, the bishops both encourage the development of a Catholic theology of peace and make concrete recommendations for public policy on war and peace. Reiterating the Catholic just war tradition, the bishops focus in on two criteria from this ancient tradition which raise, in their judgment, insurmountable moral difficulties for the use of nuclear weapons: proportionality and discrimination. They write, "Today the possibilities for placing political and moral limits on nuclear war are so minimal that the moral task…is prevention, we must refuse to legitimate the idea of nuclear war," (#131). Beyond the condemnation of war, the bishops attend to the task of peacemaking.   They call for progressive disarmament of the nuclear arsenal; the development of non-violent means of conflict resolution, including an increased peacemaking role for the United Nations; and active peacemaking, including poverty reduction and an end to abortion. "Peacemaking," they write in the letter's conclusion, "is not an optional commitment," (#333).

On the tenth anniversary of *The Challenge of Peace*, the Conference issued a second important pastoral on war and peace: *The Harvest of Peace is Sown in Justice* (1993). Coming after the fall of the Soviet empire, the letter updated the bishops' thinking for a post-Cold War era.

Economic Justice for All, 1986

Archbishop Rembert Weakland of Milwaukee chaired the committee that prepared *Economic Justice for All.* Following the approach begun with *The Challenge of Peac*e, the committee consulted a wide range of experts and encouraged public consideration of their drafts. Also as in *The Challenge of Peace*, the bishops here address themselves to Catholic Christians and to entire U.S public. They give themselves the task of

articulating the demands of the Catholic faith and of good citizenship in economic life. Again and again, the bishops stress the values of faith and the possibilities of a democracy in re-shaping economic life to ensure "justice for all."

The letter is a re-articulation of key principles for Catholic Social Teaching, and an application of those principles to the economic realities of 1980's America. (On the occasion of the tenth anniversary of Economic Justice for All, the U.S. bishops' conference issued a short and very helpful summary of principles entitled, *A Catholic Framework for Economic Life*.) It is shaped by these three memorable questions: "What does the economy do *for* people? What does it do *to* people? And how do people *participate* in it?" (Chapter 1, #1). The principle of participation, applied here especially to employment, receives great attention. So also does the principle of preferential option for the poor. These two factors are, in the bishops' estimation, the main measuring sticks for the performance of the economy.

Having established these principles and re-presented the Biblical vision of justice, the bishops turn to the U.S. economy itself. They give lengthy attention, and analysis in some detail to the economic realities of the time. They address specific groups of participants in the national economy, such as owners, managers, labor unions, and government officials. They select four dimensions of economic life for close scrutiny: employment, poverty, agriculture, and global interdependence. In each area, the bishops offer both analysis of the problems at hand and policy recommendations for bringing the economy more closely in line with their vision of justice. Although some of the statistics and legal details used in the 1986 pastoral are outdated now, the vision remains an inspiring challenge for the nation.

Renewing the Earth: An Invitation to Reflection and Action on Environment in Light of Catholic Social Teaching,1991

As growing concern over the environmental crisis spread around the globe, and the political environmental movement grew more powerful in the United States, the US bishops marshaled relevant themes of Catholic Social Teaching for the protection of the natural world. The established principles of human dignity, option for the poor, promotion of the common good, and solidarity are woven together with theological and Scriptural notions of stewardship to create the beginnings of a Catholic environmental ethic. Without proscribing any concrete solutions to the environmental problems cited by name (deforestation, global warming, erosion, oil spills, ozone depletion, etc.), the bishops make a start in developing a theologically and Scripturally based mandate for the care of the earth, tied very closely to the foundational Christian concern for the poor. "Our tradition calls us to protect the life and dignity of the human person, and it is increasingly clear that this task cannot be separated from the care and defense of creation," they write on the "Aims of This Statement."

Although the bishops' most powerful and well-developed arguments for environmental ethics stem from the principle of dignity of the human person, in this pastoral statement they also attempt to articulate a vision of humanity as part of, rather than as overlords of

creation. "Safeguarding creation requires us to live responsibly within it, rather than manage creation as though we are outside it." The creation accounts of Genesis, the Hebrew practice of Sabbath for the land, the prophets' messages of both doom and harmony, the witness of Saints Benedict, Hildegard and Francis, the beauty of creation as a reflection of God, and Jesus as the firstborn of the new creation are all brought forward as reasons for respecting the created, non-human world in its own right. For all of this, however, the bishops themselves admit that 'Catholic social teaching does not offer a complete environmental ethic." Rather, ecological responsibility as imagined here remains mainly a necessity for a just and sustainable global society.

Strengthening the Bonds of Peace, 1994

The National Conference of Catholic Bishops began considering a pastoral letter on women's concerns in 1983. The idea, offered by the NCCB Ad Hoc Committee on Women in Society and in the Church, was to create a process of consultation similar to that used for *The Challenge of Peace* and *Economic Justice for All*. A special commission of women scholars, including theologians and others, would be appointed to hold hearings on the subject across the country. The findings of the hearings would information the bishops' thought as they crafted the letter. While the pastoral was in development, however, the world Synod of Bishops, Pope John Paul II and the Congregation for the Doctrine of the Faith all issued their own controversial statements on the roles of women in Church and society. A firestorm of philosophical and theological debate among theologians, lay Catholics and the bishops themselves would surround these statements. Over the next 10 years, four drafts of the pastoral letter on women were brought to the NCCB. None of them received the two-thirds majority required to issue a document of such weight. (For a more detailed history of the development of this document, see *Pastoral Letters and Statements of the United States Catholic Bishops, Volume VI 1989-1997*. Ed. Patrick W. Carey. Washington, DC: National Conference of Catholic Bishops United States Catholic Conference, 1998.)

Within this context of tension and conflict, the Conference perceived the necessity addressing sexism and affirming the equality of the sexes, even in some scaled-back way. A "pastoral reflection" was agreed upon. They name their document "*Strengthening the Bonds of Peace*" and open with a discussion of the meaning of peace and the path of peacemaking.

The themes of their reflection are dialogue, leadership, equality and diversity of gifts. They open by affirming the Vatican pronunciation that "priestly ordination is restricted to men." And they call for increased thoughtfulness about "how [women are] to have a voice in the governance of the Church." Interestingly absent from their analysis is a strong theology of complementarity embraced and promoted by John Paul II. The bishops do assert that, "equality does not imply sameness in roles or expectations." But their depiction of the relationship between men and women in the household, the workplace and in the church attends largely to the respect and exercise of the gifts of individual women, rather than to any notion of particular roles for the female (or male)

gender as a whole. The document stresses the importance of mutuality in relationship, and the virtue of humility for each member of the body of Christ.

Faithful Citizenship: A Catholic Call to Political Responsibility, 2003

This statement, issued by the Administrative Committee of the United States Conference of Catholic Bishops, is the latest in a series begun in 1976. Every four years, coinciding with the beginning of the US Presidential election cycle, the bishops call on Catholics to exercise their rights and responsibilities as US citizens guided by their faith's vision of human dignity and the common good. They call for active engagement in the political process, by voting, but also "by running for office; by working within political parties; by contributing money or time to campaigns; and by joining diocesan legislative networks, community organizations, and other efforts *to apply Catholic principles in the public square*," (emphasis added).

Reiterating seven key principles of Catholic Social Teaching (life and dignity of the human person; call to family, community and participation; rights and responsibilities, option for the poor and vulnerable; dignity of work and the rights of workers; solidarity; and caring for God's creation), the document insists on the moral meaning of political action. The bishops go on to identify their current "moral priorities for public life." The issues addressed in the 2003 document include abortion, euthanasia, preemptive use of force, nuclear weapons, marriage laws, the living wage, the internet, union organizing, welfare reform, health care, housing, hunger, education, and many others. Even in this application, however, the document insists that the Church is "called to be **principled but not ideological**," and "**political but not partisan**" (emphasis in the original). Scripture and Church tradition demand the protection of human life and dignity, and insist upon a special concern for the most vulnerable members of society. These demands of faith compel believers to engage contemporary social questions, and are the criteria for judging that engagement.

Those interested in the intersection of Catholic Social Teaching and electoral politics should also note that *Faithful Citizenship* is accompanied by a media, education, and parish-based strategy for promoting the bishops' vision.