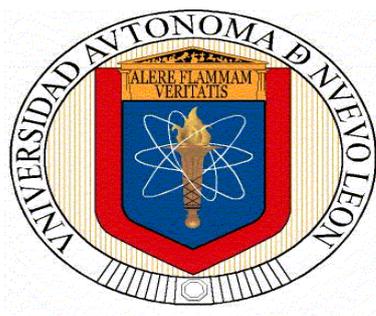# UNIVERSIDAD AUTÓNOMA DE NUEVO LEÓN
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THE INDIVIDUAL AND COLLECTIVE EFFECT OF U.S. COLONIALISM IN

PUERTO RICO: A SCALE CONSTRUCTION AND VALIDATION, WITH

IMPLICATIONS FOR SOCIAL WORK EDUCATION AND PRACTICE

TESIS
QUE PARA OPTAR POR EL GRADO DE DOCTOR EN FILOSOFÍA
CON ORIENTACIÓN EN TRABAJO SOCIAL
Y POLÍTICAS COMPARADAS DE BIENESTAR SOCIAL

PRESENTA

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DICIEMBRE 2011

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CHAPTER 1

INTRODUCTION

1.1 Dissertation´s Structure

This dissertation consists of five chapters, besides appendices and references. Chapter 1 introduces the subject and purpose of the study, as well as the problem statement. It also presents the research paradigm and theoretical framework that supports the study. This will lead to Chapter 2 that consists of theoretical and empirical literature review regarding colonialism, colonialism in Puerto Rico (focusing on U.S. colonization), and implications and relevance of the study for the Social Work profession. It ends with a summary of the chapter. The methodology of the study will be presented in Chapter 3, including the research design, hypothesis, sampling design, validity and reliability, data collection strategies, data analysis plan, and the Institutional Review Board Protocol. Chapter 4 shows the research findings including the demographic frequencies as well as the process for the *Colonialism Scale for Puerto Rican´s – CSPR –* construction and validation. and Chapter 5 consists of the analyses of the findings, strengths, and limitations of the study. It also discusses implications for the social work profession and education, and lastly provides recommendations for further research studies

1.2 Subject of the Study

"Understanding the individual and collective psychology of the people of Puerto Rico requires an understanding of both the history of its colonialism and the U.S. laws that have helped shaped the social world of the Puerto Rican people, in the United States and in the colony itself"(Rivera Ramos, 2001, p. 4). As previously

mentioned, this study reviews the issue of colonialism with emphasis on measuring U.S. colonialism in Puerto Rico. This study created and tested the *Colonialism Scale for Puerto Ricans* (*CSPR*), a scale constructed to measure internalized colonialism amongst the people of Puerto Rico.

1.3 Purpose of the Study

The purpose of this study is to integrate the philosophical and theoretical postulates of the issue of colonialism in general, and U.S. colonialism in Puerto Rico in specific, with an empirical component. The philosophical and theoretical literature regarding the topic of this study is vast; nevertheless, that is not the case with the empirical work available. Empirical studies available are mostly carried out from a psychological perspective. Yet, each one of the empirical studies reviewed, regardless of its method or approach, forms part of the basic grounds for this research.

An initial review of the research literature made it evident that there is an absence of any kind of instrument to measure Puerto Ricans' internalized colonialism or colonial mentality. This research is planned on the basis of construction, validation and testing of a scale to measure Puerto Ricans' internalized colonialism or colonial mentality. Ultimately, the goal is to have an instrument available to quantitatively measure the degree of internalized colonialism among Puerto Rican adults that can be use for further research and social work assessment.

1.4 Problem Statement

Colonialism might be considered an anachronism or outdated issue by some people; others might think it is not only outdated, but also, nonexistent. However, this research presents theoretical and empirical support for the notion that colonialism is an important current issue, and so are its broad psychosocial effects. It sustains the

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concept that colonialism is a relevant and unresolved subject matter for Puerto Ricans and an important issue to be revised and debated by social work professionals and scholars. In the Inaugural Hokenstad International Social Work Lecture, Professor Jim Ife (2007) described colonialism as an agenda that social workers need to revisit. It is, he said, a situation extremely related to human rights, and social justice, both fundamental values of the social work profession. Colonialism is also an issue of people's right for self-determination; one of the main values of the social work profession.

Certainly, colonization is not a modern state of affairs, but rather an ancient condition. Just to mention a few, as far back as the second century AD Roman Empire stretched from Armenia to the Atlantic. Later on, the Mongols conquered the Middle East and China, and in the fifteenth century, the Ottoman Empire extended over most Asia Minor and the Balkans (Loomba, 1998; Marsiglia & Kulis, 2009; Osterhammel, 2002; Prasad, 2005).

Colonization and colonialism are two different concepts; while colonization denotes the process of territorial acquisition, colonialism represents a broad spectrum of domination (Osterhammel, 2002). Both concepts, however, are closely linked. The so-called "discovery of the New World" in 1492 opened a door for the expansion of the pre-existing colonialism. Spain initiated a colonization that soon developed into a violently imposed occupation with a history of slavery, deaths, oppression, and forced migration; mainly from Africa (Delgado-Cintrón, 1977; Picó, 2006;). Colonies were places where surplus populations, often the undesirable, could be safely exported (Cannella & Viruru, 2004). Pushkala Prasad (2005) describes colonialism as one of

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the most significant and omniscient social processes to have taken place over the last five centuries.

Fifty-five percent of the earth's land surfaces were claimed by the imperial powers of western and southern Europe by the year 1800. Imperial powers either controlled or occupied 90 percent of the world at the beginning of World War I (Cannella & Viruru, 2004). Figure 1.1 shows a map of the world colonial possessions by year 1910.
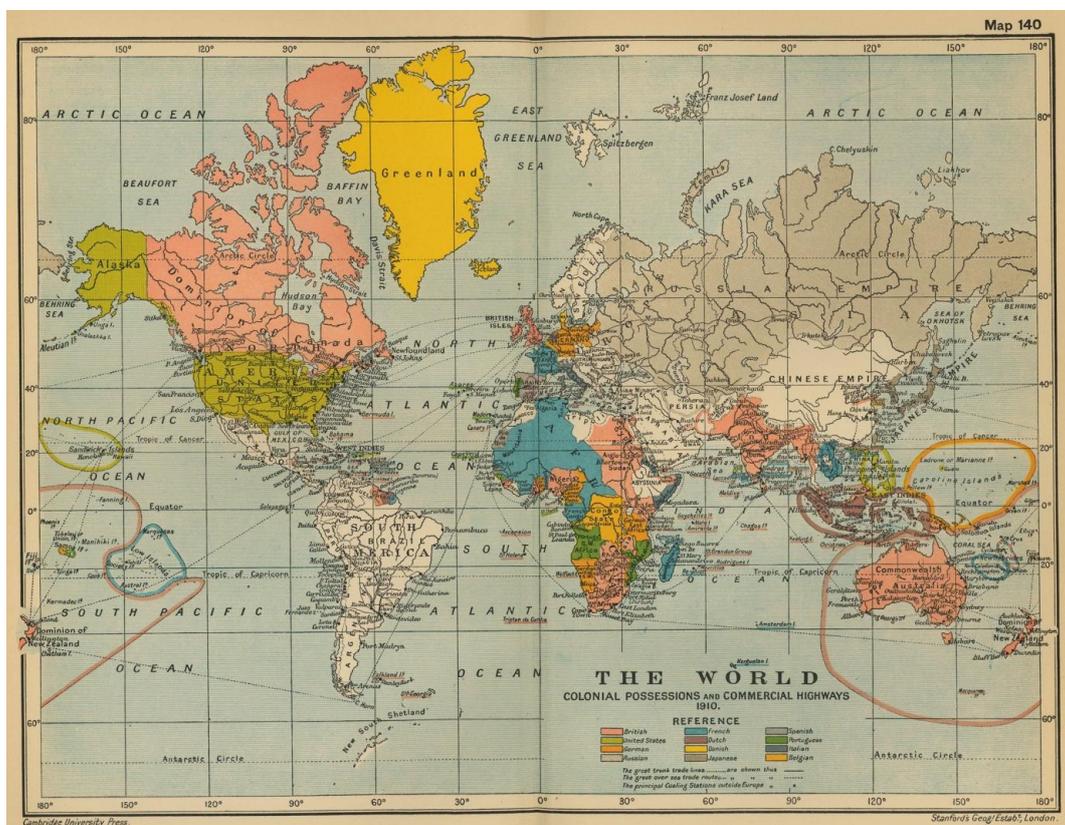
Figure 1.1 Colonial Possessions of the World, 1910 (Cambridge, 1912)

Colonial rule in the Modern Era was so widespread that by 1930 "colonies and ex-colonies covered 84.6 percent of the land surface of the globe," in addition to determining the cultural and political character of the world (Loomba, 1998, p. xiii; Ashcroft, 2001). Puerto Rico is a nation, which like many others in the so-called

"New World" has experienced colonialism; but by two different empires. Initial colonization in Puerto Rico began in 1508 by the Spaniards; followed in 1898 by United States of America (Cannella & Viruru, 2004, Picó, 2006; Rivera Ramos, 2001, Scarano, 1993).

There are arguments regarding whether or not colonialism was resolved throughout the world in the mid twentieth century, and if indeed the colonial status of Puerto Rico was resolved in 1952 with the establishment of the *Estado Libre Asociado de Puerto Rico-ELA*1 (Commonwealth of Puerto Rico). Actually, in 1953, utilizing the *ELA* status as evidence, the United States presented to the United Nations Organization, and got accepted, the pretension that Puerto Rico was not anymore a dependent territory (Méndez, 1980). Yet, the Puerto Rican political status issue and its effects are still a major unresolved social issue that is continuously discussed and challenged by the people of Puerto Rico. A line of argument of this affair and its effects are presented in the literature review chapter.

1.5 Theoretical/Conceptual Framework

Human societies are composed of many parts that interact in complex multiple ways which are hard to reduce to simple, linear, cause and effect explanations (Bergesen, 1980; McNown Johnson & Rhodes, 2005). Conscious of the complexity of human nature, social systems, colonialism, and the history of Puerto Rico, and in an attempt to offer a thorough analysis, this researcher is using an interrelated multidimensional theoretical framework rooted in the Critical Social Science (CSS) paradigm. Colonial theories are representatives of the Critical Social Science

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1 *Estado Libre Asociado de Puerto Rico (ELA)* – Spanish name given to the Commonwealth of Puerto Rico, which literarily means *Associated Free State.*

Paradigm and are the cornerstones of this investigation; followed by the Conflict theory, Oppression, and Empowerment as the building blocks. The Ecosystems Perspective serves as the infrastructure, while the Ecological Perspective and Life Model of Social Work practice represent the gear for an emancipator social work education and practice.

Critical Social Science originates in the Social Research Institute at Frankfurt University. Some of its most famous exponents are Jürgen Habermass, and Herbert Marcusse. Part of its background comes from the Marxist theory of social class (Pozzuto, 2000). The CSS paradigm focuses on oppression, attempts to confront social injustice, and uses research to empower oppressed groups. It is political and emancipator (Agger, 1998; Kreuger & Neuman, 2006; Rubin & Babbie, 2005). It also argues that structures of domination are reproduced through people's false consciousness, and promoted by ideology and hegemony. Ideology refers to all systematically distorted accounts of reality that both conceal and legitimate social asymmetries and injustices (Habermas, 1972, in Prasad, 2005). It permeates everyday lives in a subtle and subliminal way, through mass media communication, technology, and textbooks "where ruling ideas are the ideas of the ruling class" (Agger, 1998, p. 123).

While Conflict Theory identifies the proletarian working class with revolutionary potential, Critical theorists are more likely to see this potential in students, intellectuals, marginalized groups and people of the [Resistant World2] (Prasad, 2005). Critical Social Science should not be confused with Critical Thinking

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2 Resistant World is used in this research as a substitution for Third World. Discussion regarding this account will be provided in next chapter.

which is a pedagogic movement, says Prasad (2005). Considering that the CCS paradigm sees society as being in an ongoing process rather than in an unchanging social order, and sees research as an emancipator mean this researcher found it suitable for her research topic (Kreuger & Neuman, 2006).

Colonial theories are also considered as theories of oppression that acquire their relevance from the work of their major exponents. Aimé Césaire is known for the development and writings on black identity; also for the *Discourse on Colonialism* (2000). Frantz Fanon was a psychiatrist, revolutionary, and political analyst, well known for his anti-colonial works: *The Wretch of the Earth* (1986), and *Black Skin, White Masks* (1967), among others. One of the most renowned educators, the Brazilian Paolo Freire also belongs to this group of scholars. He subscribed and contributed to the theory of oppression but also the alternative of liberation or empowerment through *conscientization*. His most important writing is *Pedagogy of the Oppressed* (1990). Albert Memmi described the dialectic of the colonizer and the colonized in his famous book *Portrait of the Colonized* (2001). Edward Said is well known for his theory about the colonial discourses: Orientalism, Primitivism and Tropicalism (1994). Ania Loomba is an Indian professor distinguished for her theoretical dimensions of colonial and post-colonial issues, being one of them: *Colonialism/Post colonialism* (1998). Working from the post-positivist tradition Pushkala Prasad reviews colonial theory and research methods in his book: *Crafting Qualitative Research: working in the post-positivist traditions* (2005). Most of these contributors to colonial theory have been survivors of colonial regimes themselves.

The empowerment theorists make certain that although political and social change is needed when oppression and social injustice is present, people also need

cognition to gain insight and develop their inherent power or strengths. This cognition

and insight furnish them with the required tools to participate in the needed social

action and change. Otherwise, social change will be provoked and accomplished by

those in control and power, usually high class, males, and favoring their own agendas

(Mills, 1956; Piven, & Cloward, 1997). Salant (2002) claimed that nearly half of new

members elected to the U.S. Congress in the 2002 were millionaires of similar

backgrounds who shared mutual interests and agendas: usually, "the welfare of big

business." (In McNown Johnson & Rhodes, 2005, p. 28).

Paulo Freire also affirmed and discussed the duality of the oppressed and the

oppressor. Similarly to Memmi (2001) Freire ascertained that the oppressed is

unaware of his or her oppressive system, furthermore, the oppressed consider him or

herself as part of the oppressive system and in many occasions becomes the oppressor

to peers. He also considered knowledge or *conscientization* through education as the

means to attain the needed empowerment to move people towards attaining the

eradication of social injustices, inequalities and oppression. Useful and liberating

forms of knowledge cannot be neutral, he stated; it should rather be inherent to

people's interests, and based on their system's power relations and cultural realities

(Freire, 1990). Conscientization differs from the narrow problem solving and

functionality of traditional education (also referred to as technocratic consciousness)

where knowledge is used as a mean to an end, rather than knowledge as a way of life

(Prasad, 2005).

Conflict Theory ascertains that social systems are not united or harmonious but

instead, are divided by differences of class, gender, race or other characteristics that

reflect differences in social power. Problems are defined as social and structural rather

than individual, so, they can be solved only by social change (McNown Johnson & Rhodes, 2005). The conflict tradition goes farther than mere criticism of the social order; it has the committed intention of changing the overall system (Prasad, 2005). Karl Marx is one of the more important exponents of this tradition. Marx believed that those who control the means of production control mental production as well. They have the power to develop and reproduce ideas and values that are taken as reality instead of propaganda (Pozzuto, 2000). Its ultimate goal is to enhance public awareness of the sources of domination and subversion of ideological forces that will jointly initiate fundamental changes in consciousness and power (Held, 1980). Antonio Gramsci, on the other hand, posted the concept of hegemony. Hegemony is described as the influence and domination of one sociopolitical group by another. He claimed that it is a sort of domination that cannot always be seen or is obvious, but is masked with illusions, myths, and distortions (1975).

Social Constructionism is also considered part of the CSS paradigm. Social Constructionism conceives of social reality as a product of a historical and continuing process regularly shaped by social, political, economic, and cultural factors. It focuses on social interactions and cultural assumptions (Lehmann & Coady, 2008). Social constructionists believe that personal meanings and views of social reality grow out of interaction and discourse in daily life experiences (Blundo, Green & , 1994).

This study assumes an ecosystem theoretical approach, which is derived from Ludwig von Bertalanffy's general system theory, and the ecological concept that interacts between environment and organisms (Barker, 2003). General systems theory provided a multicausal context for understanding human behavior by emphasizing the

interdependence and interaction between the many systems in which organisms interact (Greene & Frankel, 1994).

Carel Germain & Alex Gitterman (1996) distinguish three basic broad systems in which people interact: micro, mezzo, and macro system. The micro system entails the biological, psychological and social aspects of the person. The mezzo system refers to any small group, including family, work, or any other small group with which the person interacts. The macro system is the larger system in society which includes the sociopolitical, historical, economic, and environmental forces that influences the overall human condition.

The ecosystems theory recognizes the interrelatedness of people and their environment; it perceives behavior patterns as interactional and reciprocal rather than linear. Instead of saying B is consequence of A, or A causes B; it would rather say, A might have an influence on B; but B also influences A (Dorfman, 1988, McNown & Rhodes, 2005). The ecosystems theory provides a comprehensive framework for the understanding of human behavior, and is also widely used in the field of social work

The *Life Model of Social Work Practice* establishes the need to view people and environments as systems within a particular cultural, historical context. People are not passive in their environment; they rather transform their environment and relationships as much as their environment and relationships transform them (Germain & Gitterman, 1996, McNown Johnson & Rhodes, 2005; Robbins, et. al., 2006). Although the model does not mention the specifics of political context, and even less, the issue of colonialism, it is assumed that those concepts can be included in the cultural and historical context. In fact, after some criticisms to the perspective and model's limitations, Germain & Gitterman (1987) argued about the revision and

evolution of the model in which they include concepts of empowerment, need for political action, and to connect micro and macro levels of social work practice.

After revising their model, Germain & Gitterman (1996) evolved their model by calling on social work practice and education to search for an end of oppression, and to stand against social inequalities and injustices. This can be done, they said, by mobilizing community resources, influencing unresponsive organizations to develop responsive polices and services, and by politically influencing local, state, and federal legislation to support social justice (Germain & Gitterman, 1996). In this sense, the researcher believes that the model is compatible with the Critical Social Science paradigm selected for this investigation.

The micro, mezzo, and macro systems model is the model selected for this research, in which the micro system represents the Puerto Rican people, the mezzo system represents the groups, agencies, organizations, and institutions in the society in which they interact, and the macro system represents the colonial forces that influence their overall human condition. However, the original posit of the ecological perspective that suggests adaptiveness between the person and the environment is challenged in this research, and certainly adopts the more recently revisited *Life-Modeled Practice of Social Work* (1996).

The aforementioned theoretical framework provides the groundwork for the *Colonialism Scale for Puerto Ricans CSPR* construction. Empirically measuring a social concept is probably one of the most difficult tasks of the social sciences. It is a challenge that goes from defining the concepts, based on the literature review and theoretical framework, through the selection or construction of the measurement instrument to be used. The *Colonialism Scale for Puerto Ricans* (*CSPR*) is the

instrument developed and tested by this researcher in the quest to measure the Puerto Ricans' internalized colonialism.

The construction of this Likert Scale was based on the Psychometric Theory of Jun Nunnally (1978) which stated that measurements consists of rules for assigning numbers to objects in a way that represents quantities of attributes that eventually lead to standardizations. The classic work of Allen L. Edwards (1957), and the recent work of Robert F. DeVellis (1991), and Lewis Aiken, (1996) were the basis for this scale construction. The model selected for the scale construction was that of Paul E. Spector (1992). However, its starting point was the Colonial Mentality Scale (CMS) developed by E.J.R. David & Sumie Okasaki (2006).

CHAPTER 2

LITERATURE REVIEW

Social structure is frequently based on outdated practices of exploitation of some people in the system. Inequality between persons, social classes, and the larger social structures are promoted by powerful forces, which produce oppression and disparities in people's lives (Gil, 1998; Robbins, et. al., 2006). Arguments of the power disparity that emerged from U.S. colonialism in Puerto Rico are presented in this chapter. However, there are two concepts that need prior clarification: Third World, and Americans.

1) **Third World** – Barker (2003) defines Third World as the nations of the world that are underdeveloped but growing. The Western and Eastern-bloc nations are identified as the First and Second World respectively. It also adds a Fourth World, which consists of those countries with "few resources and little hope of development". The Third World distinguishes from the Fourth World by regular increases in literacy rates, per capita income, financial reserves, and use of natural resources (p.4).

   The notion of dividing the world into hierarchical categories has been created by the First World, claims Canella & Viruru, (2004).That unquestioned categorization represents the United States as the First World, West Europe and Soviet Union as the Second, and Africa, Asia and Latina America as the Third. The world categorization is generally associated with amounts of industrial development and economic power, but also with superiority and inferiority (Canella & Viruru, 2004).

It is not surprising that the Third World category is representative of the colonized countries of the Modern Era, and the First and Second World the colonizers. These categorizations would have been different prior to colonization when the presently underdeveloped countries had a surplus of capital goods and were developing independently (Bergesen, 1980; Rodney, 1981).

Conscious of the resiliency of the oppressed countries, and that language serves as a means for the perpetuation of ideology and oppression, unless it is needed to make a specific statement, this researcher will use the term Resistant World in opposition to Third World (Córdova Campos, 2010).

2) **American** – American is the noun used in this research in reference to the citizens of the United States. However, this researcher is aware that this noun should not be exclusive for this population, but for any native or inhabitant of the American continent, known as the Americas. Usually the term will have a qualifying adjective, i.e.: North American or Latin American (Merriam-Webster, 2005).

2.1 Colonialism

Colonialism is the takeover of a geopolitical territory, the appropriation of its material resources, the exploitation of people through labor, and the organized interference with their political and cultural structures (Balandier, 1966; Childs & Williams, 1997; Loomba, 1998; Osterhammel, 2002). Capitalism was established alongside with colonialism, "It has been the historical form by which most of the world has lost control over their local economies, and have been forced to participate

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in certain productive activities, including the export of raw materials, and labor force"

(Bergesen,1980,p.125; Loomba, 1998). The colonizers made and implemented their

decisions regarding the colonies based on their own interests, and frequently from the

distance of their own country (Cannella & Viruru, 2004; Loomba, 1998).

The colonization process that began in the late fifteen century with the

European so-called "New World Discovery" is a form of colonialism, also known as

Modern Colonialism or European Colonialism (Loomba, 1998). Modern colonialism

was not a linear historical process; actually, Bergesen (1980) talks about two waves or

cycles of colonialism. Although it is frequently referred to European colonialism, the

United States also participated in it, especially on the second wave (Cannella &

Viruru, 2004). The first wave took place in the Americas on the late fifteenth century,

and the second one in the nineteenth century in Africa, India, and Asia. It reached its

peak in the nineteenth century, but before that, by the sixteenth century the vast

majority of the world's territories were under colonial control (Bergesen, 1980;

Osterhammel, 2002). "Rarely has any historical phenomenon spread through the

world more extensively and less uniformly" (Osterhammel, 2002, p.27). Puerto Rico

was assaulted on both waves, by the Spaniard in 1508, and by U.S. in 1898 (Dietz,

1986; García Leduc, J. M., 2003; Picó, 2006; Scarano, 1993).

There have been as many colonies as ways to exert colonialism. Violence,

power, and oppression have been manifested in a broad range; from the savagery of

slavery, rape, and slaughtering to the more subtle ways of hegemony (Loomba, 1998;

Prasad, 2005). Yet, control is the one common thing in any colony. In a greater or

lesser extent, colonial control includes government control, constitutional powers,

imposition or establishment of military bases in strategic geographical positions,

drafting colonized people, control over the prisons, the laws, and the mass media and propaganda. It also involves two subtle but powerful types of control: education, based on the culture and history of the empire, and the imposition of their religions and annihilation of the indigenous spiritual believes or rituals (Beauchamp, et. al. 1980; Woddis, 1972).

To assure their control, colonial governments create laws and decrees that limit democracy, such as: prohibition or restriction of strikes and trade unions, rejection of political parties, and restrictions or support based on the interests of the colonizer. Suppression of criticism, local press censure, banishing or imprisoning political leaders, political repression and persecution, especially nationalists, denial or limitation of suffrage is also set up. It is possible to see all these laws or restrictions in one country, or just a combination of some of them (Beauchamp, et. al. 1980; Woddis, 1972). Nevertheless, all of them, affirmed Woddis (1972), are created with the intention of keeping the colonized subjugated and making possible the greater exploitation of people and countries' resources.

Regardless of differences in location or time, colonialism is a form of oppression characterized by relations of domination and submission; it not only creates an economic disproportion, but a psychosocial and emotional imbalance as well. It produces colonized peoples who tend to idealize the colonizer and hate themselves (Césaire, 2000; Fanon, 1986; Freire, 1990; Memmi, 2001, Prasad, 2005). Franz Fanon (1967) also stated that colonization functions as a pathological condition that eventually made all who participated in it mentally ill. Since Fanon's colonial experience was mainly in a French Caribbean colony (Martinique), and in Algeria, Africa, his work on colonial oppression is also directly related to the oppression of

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black people. The tragedy of the colonial situation lay in the preponderance of racial

identity, which overrode every other aspect of people's existence, he claimed. Black

people [the colonized] have responded to these demeaning situations by imitating the

white [the colonizer] behavior, a practice that resulted in the negation and virtual

disappearance of black identity (Fanon, 1967; Prasad, 2005). Memmi (2001), in the

Portrait of the Colonized also acknowledged the dialectical relationship between the

colonizers and the colonized, and their mutual pathological dependency on each other.

He also recognized how difficult it would be to break this pattern, even in the wake of

decolonization (Memmi, 2001; Prasad, 2005).

Scholars and colonial theorists consider all forms of colonialism a crime against

humanity, a form of oppression exerted over disadvantaged people in a social,

economic, military and political way (Cripps, 1982; Gil, 1998; Memmi, 2001; Nieves

Falcón, 2002; Prasad, 2005). It is defined as the practice where a more powerful

country subordinates a less powerful one in an economic, political, social and

psychological way (Fanon, 1967; Prasad, 2005; Silén, 1995; Varas Díaz & Serrano

García, 2003; Woddis, 1972). The colonizers are convinced of their own superiority

and right to rule, therefore, even though the colonial population is numerically a

majority, sociologically and politically they have demonstrate similar characteristics

to a minority population because they are in a power inferior position (Balandier,

1966; Osterhammel, 2002).

Violence, oppression, and control needs some sort of justification and

rationalization; by doing so the abuser lessens, avoids or eliminates its responsibility

or guilt feelings, if any, and also attempts to convince the abused of their lack of

deservedness. Economist Peter T. Bauer, for example insists that allegations that the

West is responsible for the poverty of the Resistant World are either misleading or untrue. To sustain his theory, Bauer (1978) claims that the poorest and most backward countries have until recently had no external economic contacts and often have never been Western colonies. He asserts that colonial rule developed large agricultural, commercial, and industrial complexes. Before colonial rule, he claims, there was not a single cocoa tree in the Gold Coast, now Ghana. Lastly, for Bauer, colonialism is compatible with economic development; "some of the richest countries were former colonies, for example North America and Australia", he asserts (Bauer, 1978, p.155).

Along with the discourse of colonialism's compatibility with economic development, several other discourses were disseminated (Bauer, 1978, Prasad, 2005; Said, 1994). Colonial discourses were produced according to the location of the colonized territory. Those discourses assist in the perpetuation of colonialism, and present the superiority of the European against the inferiority of the native (Prasad, 2005; Said, 1994). The colonial discourse refers to the entire way of seeing, thinking, and writing about colonized or formerly colonized people. The discourses flourished in diverse institutional areas, including art, cinema, literature, church, textbooks, history, education, public administration, and mass media (Prasad, 2005; Aparicio & Chávez-Silverman, 1997).

Colonial discourse and hegemony distorts people's interpretation of reality without the use of force. The dominant class perpetuates their intervention by promoting the ideas of the colonizer superiority, which are then accepted as natural or correct. Like hegemony, colonial discourses use the culture as the means to deliver an intangible web of control that touches every area of society (Childs & Williams, 1997; Gramsci, 1975; Loomba, 1998). These colonial discourses are based on stereotyped

images and ideas of real cultures and people. The colonizers' cultures opposed to the colonized are presented as superior or vanguard cultures. The colonized prevail then as savages, irrationals, dangerous, lazy, degenerate, and corrupt or otherwise as sexually tempting figures (Prasad, 2005).

Edward W. Said (1994) divides the territorial discourses into three: *orientalism*, *primitivism*, and *tropicalism*. *Orientalism* is found in representations of Turkey, the Middle East, India, and the Far East. It is mainly responsible for the cultural disjuncture between the East and the West; and collaborated in the discursive production of an orient that was mysterious and exotic, and inhabited by cunning, degenerate, ferocious, but also languid and concealed, erotic and sexualized people (Prasad, 2005; Said, 1994). It also suggested the Orient as a good place for realization of projects that involved the native inhabitants but request no direct responsibility to them. A place with inhabitants that are also unable to resist the projects, images or mere descriptions devise for it (Said, 1994).

Primitivism is a discourse relating to Africa, cultures of the African Caribbean, and African-Americans. It represents these cultures as overwhelmingly primitive, savage, and wild; also having an inability to progress (Prasad, 2005). Nevertheless, in opposition to the primitivism discourse, Rodney (1981) suggests that the underdevelopment of the Resistant World is actually a product of capitalist, imperialist, and colonialist exploitation of people and their territories.

African and Asian societies were developing independently until they were taken over. Rodney (1981) describes the paradox of many parts of the world that are naturally rich but are actually poor, conversely parts of the world that are not so well off in wealth of soil and subsoil but are enjoying the highest standards of living. The

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developed countries have a stronger industrial and agricultural economy than the rest of the world because they produce far more goods than the poor nations. African's natural wealth product goes to benefit Europe, North America and Japan (Amin, 1976; Rodney, 1981).

Tropicalism, on the other hand, infers representations of Mexico, Latin America and parts of the Caribbean, based on the dominant culture's projections of fear (Aparicio & Chávez Silverman, 1997, Prasad, 2005). It establishes a debatable division between the so-called temperate zones, referring to United States and Northern Europe, in comparison with the tropical countries mentioned. The *tropicalism* discourse represents tropical cultures as a lush paradises filled with a combination of apathetic and seductive people. Women of the Caribbean are represented as torrid, passionate, sexually eager, and available (Briggs, 2002; Benz, 1997). The rest of the people are represented as lethargic and incompetent, or incisive, implacable and violent (Benz, 1997).

The chronicles of the Spaniards are filled with the savage image of the natives of the Caribbean, including the myth of cannibalism among the *Caribes*, the indigenous people of the Caribbean (Sued Badillo, 1978). Such chronicles were so profoundly influential that historical text written by Puerto Ricans up to the early twentieth century were using those sources as evidence, and of course being echoed by popular opinion, as is the case of the work of Cayetano Coll y Toste (Sued Badillo, 1978). The Spaniard's chronicles were disseminated along with engravings of the imaginary cannibalism, which built up the image of the barbarian tropics, and were well received by Europeans who wanted to read about thrilling cannibalism and the recently discovered savages, (Loomba, 1998; Sued Badillo, 1978).

All kind of literature and ethnographic documentation carried out by foreigners started to flourish. Among others, *The Tempest* by W. Shakespeare (1907), and *Tristes Tropiques*, a memoir about the travels in South America and the Caribbean, written by anthropologist Claude Lévi-Strauss (1955). Other documentation likewise the Spaniards chronicles, brought up hazy and out of context images of people from the tropics, specifically Puerto Rico.

Usually assigned by military or civil government, ethnographies and codified catalogues of colonial people were produced. Those catalogues are similar to the famous *The People of India* 1868-1875, (Watson, et. al., 1868). The tropical equivalence of such catalogue is *Our Islands and Their People: as seen with camera and pencil* (Bryan, 1899). It is an extra large photographic catalogue consisting of two volumes of pictures and descriptions of the "people and the islands lately acquired from Spain, including Hawaii and the Philippines", with an introduction by Major-General Joseph Wheeler (Bryan, 1899). The U.S. agencies produced *Cuba and Porto Rico: with the other islands of the West Indies*, another full-size book describing Puerto Rico and its people (Hill, 1899). Hill (1899) described Puerto Rico and Puerto Ricans as:

"A small microcosm only twelfth the area of Cuba…, yet ten times more densely populated. ...Porto Ricans are plodded along in contentment, without permitting serious thoughts of revolution to bring insomnia to a utopian land where sleepiness is not a crime. [They] live in a densely crowded bohíos or other small houses… swing themselves in their hammocks all day long, smoking their cigars and scraping a guitar, or a

miniature home-made imitation thereof, called a *tiple*, accompanied by

scratching upon a hollow gourd"(p.p. 145-146, 168).

John Gunther (1941) replicated in Latin America the same report book style that he presented on his previous works: Inside Europe (1936), and Inside Asia (1939). Although he attempted to present an objective and professional analysis, still some of his statements and interpretations are peppered with prejudice and misconceptions. The same is to be said about the broadly circulated ethnography realized in Puerto Rico by the U.S. American, Oscar Lewis: La Vida: a Puerto Rican Family in the Culture of Poverty - San Juan and New York (1966).

Colonialism as well as the discourses that come along with it affects the individual and the collective in such diverse and comprehensive ways that few life aspects or personality traits are not influenced by it. Thoughts, behavior, passion, and self-image are affected; also the way others think about, and behave towards the colonized (Memmi, 2001).

2.1.1 The United Nations (UN) Position Regarding Colonialism

In spite of forms, intensity and decades of colonial regimes, there are also anti-colonialism theorists and activists who have influenced the establishment. Among others, the United Nations Organization (UNO or UN) has been an active advocate for the termination of colonialism. The UN Charter was signed in 1945. Chapter XI of the Charter comprises the *Declaration Regarding Non-Self-Governing Territories*. This chapter includes article 73 e, which requests any Members of the UNO, that have or assume administration of territories not yet self-governed, to transmit regularly information to the Secretary General regarding the economic, social and educational conditions in the territories (United Nations Organization, 1945).

In 1960, considering the harmful outcomes of colonialism, and guided by universal human and civil rights, and the people's rights for self-determination the UN General Assembly adopted the resolution 1514 (XV): *Declaration on the Granting of Independence to Colonial Countries and Peoples*. The resolution 1514 (XV) postulates that the existence of colonialism prevents the development of international economic cooperation, impedes the social, cultural and economic development of dependent peoples and militates against the United Nations' ideal of universal peace, and their conviction that all peoples have an inalienable right to freedom, sovereignty and integrity of their national territory (United Nations Organization, 1960). The UN General Assembly established the Special Committee on Decolonization in November 1961, also known as the Committee of 24 or C-24. This committee is responsible for monitoring the implementation of the Declaration on the Granting of Independence to Colonial Territories and Peoples. The committee annually reviews the list of Territories to which the Declaration is applicable, meets with their people and makes recommendations to the General Assembly (United Nations Organization, 1961; United Nations Organization, 2000a). In 1962, the C-24 issued a preliminary list of 64 Non-Self-Governing Territories to which the Declaration was applicable (United Nations Organization, 2000b).

Aware that year 1990 would mark the thirtieth anniversary of the resolution 1514 (XV), and that evidence of colonialism was still obvious, the Forty-third Session of the General Assembly of November 1988, produced three important resolutions related to the Non-Self-Governing Territories (United Nations Organization, 1988).

1) Resolution 43/45, about implementation of the Declaration on the Granting of Independence to Colonial Countries and Peoples, reaffirms the UN´s

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resolution 1514 (XV) and all other resolutions on decolonization. It requests the Special Committee to continue to seek suitable means for the immediate and full implementation of resolution 1514 (XV), including all the necessary steps to enlist world-wide support among Governments as well as national and international organizations having special interest in decolonization. The resolution recognizes the legitimacy of the struggle of the peoples under colonial domination to exercise their right to self-determination and independence by all the necessary means available to them. It calls upon the colonial Powers to withdraw their military bases and installations from colonial Territories immediately and unconditionally, and to refrain from establishing new ones. It also requests the colonial Powers not to involve those Territories in any offensive acts or interference against other States (United Nations Organization, 1988).

2) Resolution 43/46, about the dissemination of information on decolonization reiterates the importance of publicity as an instrument to acquaint world public opinion with all aspects of the problems of decolonization. It request the Secretary General for a broad use of the media to continuously widespread the work of the United Nations, including publications, radio and television. It also requests that the Secretary General in consultation with the Special Committee, continue to collect, prepare, and disseminate material, studies and articles in various languages (United Nations Organization, 1988b).

3) Resolution 43/47 declares the period of 1990-2000 as the first International Decade for the Eradication of Colonialism. It requests the Secretary General

to submit a report to the General Assembly at its forty-fourth session with a

plan to reach the twenty-first century with a world free of colonialism

(United Nations Organization, 1988 c).

Regardless of the UN intentions for a twenty-first century world free of

colonialism and the efforts made during the first International Decade for the

Eradication of Colonialism, by the year 2000 the decolonization committee had

identified 17 Non-Self Governing Territories (United Nations Organization, 2000).

Concerned with that situation the U.N. General Assembly adopted the resolution

55/146 establishing a Second International Decade for the Eradication of Colonialism

(United Nations Organization, 2001).

East Timor became the first of the 17 remaining Non-Self Governing Territories

to attain independence on May 19, 2002, turning into the first new country of the new

millennium (United Nations Organization, 2002). However, by 2006, there were still

sixteen non-self governing territories. Appendix A shows the list of the sixteen non

self -governing territories and their respective administering power. Figure 2.1shows

the remaining non-self governing territories and administering powers.
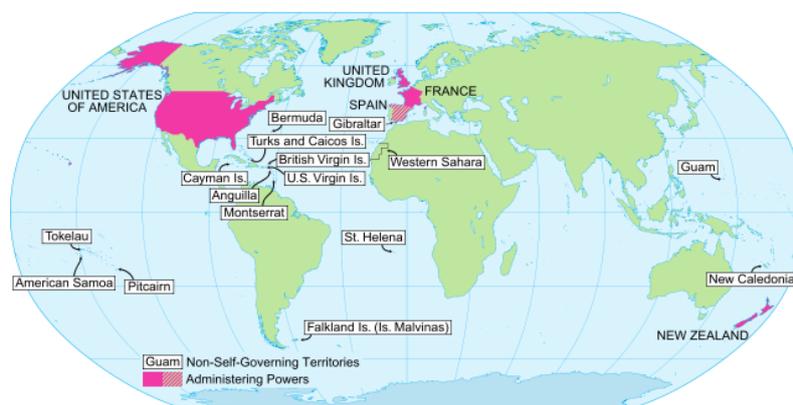
Figure 2.1, Sixteen Non Self-Governing Territories and Administering Powers' Map

(Source: United Nations, 2011)

It is important to mention that Puerto Rico was not included in the 17 Non-Self Governing Territories' list. Puerto Rico was dropped from the list in 1953 after U.S. informed the UN Secretary General that the establishment of the *ELA* or Commonwealth of Puerto Rico on July 25, 1952 was proof of Puerto Ricans' self-determination and sovereignty. U.S. hence, was no longer considered an administrator of the Puerto Rican territory; therefore, there was no need to continue transmitting regularly information to the Secretary General as required by the article 73 e (United Nations Organization, 1953). However, the people of Puerto Rico and the international community have presented regularly petitions to the UN Committee of the 24 to reinsert the issue of Puerto Rico in the decolonization debate. Evidence has been offered for the argument that Puerto Rico is de facto a colony of the USA (United Nations Organization, 2000a, United Nations Organization, 2010). Puerto Ricans have challenged that decision not only with petitions but with using other means as well (Gallisá, 2010).

2.2 U.S. Colonialism in Puerto Rico

By the end of the first wave of colonialism, when European colonies in Latin America were getting their sovereignty, Puerto Rico was starting its second colonization. In fact, the deceased secretary of justice and director of the Supreme Court of Puerto Rico, José Trías Monge (1997), referred to Puerto Rico as the oldest colony in the world.

U.S. colonialism in Puerto Rico has been performed in two different ways; the first was an open and direct U.S military and later U.S. civil administration. Conversely, the second and present one is a covert control exerted under the

euphemism of the *Estado Libre Asociado* [Commonwealth of Puerto Rico] (Beauchamp, et. al., 1980).

Any analysis of the Puerto Rican society and the construction of its identity must not conceal the power imbalance between the United States and Puerto Rico, affirms Dr. Efrén Rivera Ramos (2001). The disruption of the society's balance by U.S. invasion in Puerto Rico has been widely discussed, and considered a colonial form of oppression (Méndez, 1980; Riestra, 1974; Rivera Ramos, 2001; Silén, 1995; Trías Monge, 1997; Varas Díaz & Serrano García, 2003).

2.2.1 Puerto Rican Historical Background

"No one can grasp the contemporary realities of Latin America without some knowledge of the background…" (Gunther, 1941, p. ix). Given that colonialism has no template, a comprehensive understanding of the history of Puerto Rico and idiosyncrasy of Puerto Ricans will be essential for the understanding of US colonialism in Puerto Rico.

Puerto Rico, known as Boriquén by its indigenous people, is in fact an archipelago composed by Puerto Rico, *la Isla Grande* (the big island), Vieques, *la Isla Nena* (the girl island), Culebra, Mona, and several other smaller islands. *La Isla Grande* is approximately 100 miles (160.93 km.) long by 35 miles (56.33 km.) wide (Scarano, 1993). Puerto Rico is the smallest of the Greater Antilles, located between the Atlantic Ocean and the Caribbean Sea; close to Florida, Panama, and South America.

The indigenous people who inhabited the Americas when the Spanish arrived in their lands in 1492 had a structured and functional society (Thomas, 1988; Sued Badillo, 1978, 1979). The Taínos were the inhabitants of the archipelago of Puerto

Rico at the Spanish arrival and colonization. Thinking that they had arrived in India, the Spanish called them Indians (Scarano, 1993; Sued Badillo, 1978, 1979). The Boricua population changed immensely with colonization; Europeans and Africans rapidly populated Boriquén, the latter mainly brought as slaves (Scarano, 1993). After Spanish colonization, the Taíno population was significantly reduced; the last time they were listed separately in a census was in 1802,and they made up only 1.4% of the Puerto Rican population (Picó, 2006; Rivera Ramos, 2001). This reduction of the indigenous people was in part a result of forced labor, slaughter, suicides, and new illnesses brought from Europe for which the Taínos had no immunity or treatment, and by the mixing of the races (García Leduc, 2003; Rivera Ramos, 2001). As a result, the indigenous people of Puerto Rico were soon eradicated as a separate ethnic group. However, by the end of the 17th century the Taínos, Spaniards, and Africans had blended so strongly that they had reproduced the Puerto Rican people in their current appearance. Such a blend produced a Puerto Rican population characterized by a broad range of physical features, some of them still with a strong Taíno or African phenotype, and formed with a rich and particular cultural idiosyncrasy (Rivera Ramos, 2001; Silén, 1995).

After over 400 years of Puerto Rican's struggle and surviving of the Spanish colonial rule, U.S. military troops invaded Puerto Rico in 1898. The invasion was not an isolated event of the past; it was a second colonial assault on the people of Puerto Rico. The invasion occurred precisely by the time political reforms with Spain were taking place. In 1897, Puerto Rico and Cuba had settled an Autonomous Charter from Spain, a significant step toward self-government, economy, and other autonomous

pronouncements (Dietz, 1986; Gallisá, 2010; García Leduc, 2003; Picó, 1987, 2006; Rivera Ramos, 2001).

In April 20, 1898, United States declared the Spanish-Cuban-American War [also known as the Spanish American War] (Dietz, 1986; García Leduc, 2003; Picó, 1987, 2006).The war was allegedly motivated by U.S. interest for Cuban independence from Spain, and authenticated by the explosion and sinking of the USS Maine on February 15, 1898 at Havana's harbor. The U.S. claimed Spanish forces sank the USS Maine (García Leduc, 2003; Picó, 1987, 2006). However, U.S. economic interest in the Caribbean and the prevalent ideology of expansionism antedates the Spanish-Cuban-American war (Azize, 1982; Dietz, 1986; Rivera Ramos, 2001; Trías Monge, 1997). Actually, in 1876, James G. Blaine, who eventually functioned as US Secretary of State declared: *"I believe that there are three places outside the continent of enough value to be taken. One is Hawaii and the others are Cuba and Puerto Rico"* (Azize, 1982, p.46).

The U.S. imperial expansion was evident; they were determined to launch the U.S. foreign policy known as the Monroe Doctrine, as "conferred to them by the Manifest Destiny". Following those principles, prior to the Spanish-Cuban -American War, U.S. had fought and annexed in 1848 the Northern border of Mexico —known as Texas, New Mexico, and California—; they purchased Alaska from Russia in 1867; transferred Hawaiian Islands sovereignty to U.S. on August 12, 1898, same day as the fighting of the Spanish-Cuban-American War ceased (U.S. Congress, 1898). Six years later, in 1904, the United States agreed on a Convention between them and the Republic of Panama "for the construction of a Ship Canal to Connect the Waters of the Atlantic and Pacific Oceans" (Eliot 1910, p. 478). Puerto Rico´s proximity to

Panama was of course very convenient for the U.S. expansionism agenda (Dietz, 1986). In fact, General Nelson A. Miles, have said "…From the very beginning of the war [Spanish-Cuban-American], Puerto Rico was one of the targets of the U.S. army" (Cited in Azize, 1982, p.47).

On June 12, 1898, prior to Spanish-Cuban-American War's negotiations for peace, Theodore Roosevelt, then Assistant Secretary of the U.S. Navy, fearful of a premature peace agreement wrote to one of the officials: *"You must get Manila and Hawaii, and prevent any peace talks until we get Puerto Rico and the Philippines…"*(Trías Monge, 1997, p. 25-26). Despite of the proximity of the initiation of the negotiations for peace, or perhaps because of it, US military troops invaded Puerto Rico on July 25, 1898 (Azize, 1982; Dietz, 1986; Méndez, 1980; Picó, 1987, 2006; Rivera Ramos, 2001; Silén, 1995; Trías Monge, 1997).

The negotiations for peace started in Washington on July 26, 1898 through the French ambassador (Eliot, C. W. (Ed.), 1910). The war ceased on August 12, 1898 and the treaty of peace, known in Puerto Rico as the Treaty of Paris, was developed and signed in Paris on December 10, 1898, with no representation from the people of Puerto Rico (Gallisá, 2010; U.S. Congress, 1898). However, it was not until April 11, 1899 that the treaty was ratified and proclaimed in Washington (U.S. Congress, 1898).

Among the outcomes to the Paris Treaty was Spain's relinquishment over Cuba's sovereignty. U.S. forced Spain to bring independence to Cuba on April 11, 1899, and enforced its own occupation "for the protection of life and property" (U.S. Congress, 1898, p. 470). Spain ceded *Porto Rico* to the United States which took possession of the lands, goods and people as booty of war (Azize, 1982; Méndez,

1980; Picó, 1987, 2006; Rivera Ramos, 2001; Silén, 1995; Trías Monge, 1997). U.S. also obtained the island of Guam, other islands then under Spanish sovereignty in the West Indies, and the archipelago known as the Philippine Islands. It was agreed that the natives of Spain, residing in any of the territories might remain and adopt the new nationality. However, "the civil rights and political status of the native inhabitants of the territories ceded to the United States shall be determined by the US Congress" (U.S. Congress, 1898, p. 474). Spain conveyed to cede, after their evacuation, all buildings, wharves, barracks, forts, structures, public highways and other immovable property that belonged to the Crown of Spain. Conversely, United States conveyed to pay twenty million dollars to Spain within three months after the ratification of the treaty.

Although it is true that Puerto Rico was under high rates of poverty during the Spanish rule, it is also true that most infrastructures were already in place. In fact, prior to the invasion, U.S. consul, Phillip C. Hanna reported and advised the following to the Department of State in Washington:

> "I am still under the opinion that Puerto Rico should be taken and kept as a coal warehouse to supply our Navy… Let the fleet smash down the fortifications… and our men can take the island forever… The best road in all the West Indies is located from Ponce to San Juan, so an army can march to San Juan without having to travel through bad roads" (Picó, 1987, p. 48)

In addition to infrastructure, a significant developments in agriculture and commerce were already started, a variety of crops were produced for internal consumption and export, small and medium scale factories were also in operation (Gallisá, 2010; Pantojas-García, 1990; Picó, 1987; Rivera Ramos, 2001).

Puerto Rico remained invaded and militarily ruled for nine months prior to the formal war cessation; and the military government was kept for two years. This period set the bases for the Americanization of Puerto Rico (Azize, 1982; Dietz, 1986; Méndez, 1980; Picó, 1987, 2006; Rivera Ramos, 2001; Silén, 1995; Trías Monge, 1997). These changes provoked a great alteration on the country's psychosocial, economic and political status. People went to bed under the influence of a decadent Spanish colonial rule, but woke up under the American Army occupation. The justification for such raid was immediately spread out, it was with the aim to end the Spanish yoke (Picó, 1987).

After two years of military rule, in 1900, the Foraker Act was passed; replacing the previous military regime with a civilian government. The new regime consisted of a U.S. civilian governor who administers the colony and was appointed by the U.S every four years (Fernós, 1996; Gallisá, 2010; Rivera Ramos, 2001). It also included a Legislative Assembly, a Resident Commissioner who has voice but cannot vote, and the creation of the Department of Education (Méndez, 1980; U.S. Congress, 1900; Fernós, 1996; Rivera-Ramos, 2001). The Legislative Assembly would exercise power over local matters, but the U.S. Congress retained the power to annul the acts of the Puerto Rican legislature (Dietz, 1986; Gallisá, 2010; Rivera-Ramos, 2001). A territorial clause of the U.S. Constitution established that the U.S. Congress will make the decision regarding the sovereignty of Puerto Rico, and they as well have the legal power to give the territory to other nations if they find it pertinent (Gallisá, 2010; Rivera Ramos, 2001; Silén, 1995).

The newly established civil government was in part a result of the pressure of the Puerto Rican people and leaders requesting the end of the military occupation and

rule, but it was far from the self-rule they desired (Dietz, 1986; Morris, 1995). The new form of government forced the use of the U.S. dollar as currency. The change in currency provoked a devaluation of the Puerto Rican Pesos, which had a detrimental effect on the Puerto Rican economy (Dietz, 1986; Gallisá, 2010). Other major changes included the forced use of U.S. postal service, U.S. merchant marine, and custom duties over all imported products, maritime territory, coast and military security, immigration, as well as the establishment of the supremacy of the U.S. Federal Court (Blanco, 1981; Dietz, 1986; Marcantonio, 1950; Silén, 1995; U.S. Congress, 1900). The custom duties imposed on Puerto Rico, established that Puerto Ricans may only use U.S. ships for importing or exporting merchandise; the most expensive merchant fleet in the world (Blanco, 1981; Marcantonio, 1950; Pousada,1999). As would be expected, the Foraker Act had opposition because it allowed the U.S. government to be in charge of changing every vestige of the previous governmental and political system, including the autonomous powers that Puerto Rican had recently achieved from Spain (Gallisá, 2010; Marcantonio, 1950; Méndez, 1980).

Along with political and economy, culture was also disrupted. Streets were named after U.S. politicians including the military officials who administered the colony. The use of the U.S. flag in all public acts and buildings, the use of U.S anthem, as well as the celebration and commemoration of U.S. holidays, especially the U.S. Independence Day were imposed (Méndez, 1980; Pousada, 1999).

In addition to the socio-political changes provoked for Puerto Ricans by the Foraker act of 1900, it also brought up the controversial issue of citizenship. The colonial regime established by the Foraker Act imposed a Puerto Rican Citizenship

that was not recognized internationally because Puerto Rico was not a sovereign

country. Puerto Ricans ran into trouble with immigration agencies, including the US

Migration Agency, and some Puerto Ricans were arrested at their arrival to U.S. land.

The US Supreme Tribunal had to intervene in some of those cases where Puerto

Ricans were not allowed to enter the U.S.A. The paradox was that they were not

considered US citizens, but could not be considered alien citizens either because they

lived in a territory of the U.S.A. The Tribunal solved this problem designating the

Puerto Ricans as nationals, the classification given to Native Americans in 1844. This

classification did not recognize the right of nationals to participate in or be part of the

government (Gallisá, 2010; Rivera-Ramos, 2001).

In 1910, the President of the United States, who had also been governor of The

Philippines, W.H. Taft, recommended to the Congress the granting of U.S. citizenship

to Puerto Ricans considering the fact that U.S. citizens were living in Puerto Rico

(Fernós, 1996). The recommendation confronted opposition not only in the U.S. but

from Puerto Ricans as well. In fact, 21 bills were presented in Congress from the year

1901 until 1917 with the purpose of making Puerto Ricans American citizens (Rivera-

Ramos, 2001). On March 12, 1914, José de Diego, in representation of the House of

Representatives of Puerto Rico sent a memo to the president and to the U.S. Congress

rejecting the imposition of U.S. citizenship to Puerto Ricans (Silén, 1995). However,

in 1917, in a unilateral Congress decision, the Jones Act, also known as *Carta

Orgánica de Puerto Rico de 1917*, imposed U.S. citizenship on the people of Puerto

Rico (U.S. Congress, 1917; Rivera-Ramos, 2001; Silén, 1995; Trías Monge, 1997).

Yet, the imposed American citizenship brought many other issues, in fact, Rivera-

Ramos (2001) consider it a political decision that has become a crucial element in the reproduction of U.S. hegemony among the Puerto Rican population.

For instance, the Organic Law of 1900 or Foraker Law, created a political body constituted as, "*El Pueblo de Puerto Rico*" (the People of Puerto Rico), term that was already used in the Treaty of Paris two years earlier. The concept also established the provision for Puerto Rican Citizenship, condition that remained in the Jones Act of 1917. Yet, according to article 35 of the Jones Act, only US citizens were eligible to vote in Puerto Ricans elections (U.S. Congress, 1917).

A challenge to the aforementioned Puerto Rican citizenship dilemma was brought up in 1994 through the petition, and eventual confirmation, of the resignation to U.S. citizenship by recently deceased Attorney Juan Mari Bras (Fernós, 1996). The petition raised the predicament about the rights for professional practice, and suffrage in Puerto Rico for those Puerto Rican citizens who resign to U.S. citizenship (Fernós, 1996; Méndez Martí, 2006).

In contrast, the only juridical outcome of the newly compulsory citizenship was that residents of Puerto Rico could now use the U.S. passport, and easily get in and out of the US (U.S. Congress, 1917). Once in the U.S., Puerto Ricans have the civil, social and political rights of any other citizen of the nation without the need to go through the process of naturalization (U.S. Congress, 1917; Fernós, 1996, Rivera Ramos, 2001). US citizenship imposition did not efface colonialism, but rather consolidated it (Rivera-Ramos, 2001).

Even though highly educated Puerto Ricans were active in the economy and socio political Puerto Rican matters, way before the U.S. invasion and rule, U.S. senators and governors of the colony referred to Puerto Ricans as inept and incapable

of ruling their future (Berbusse, 1966; Dietz, 1986; Trías-Monge, 1997). A U.S.

Senate Committee reported:

> "If we should acquire a territory populated by an intelligent, capable and law-
> abiding people, to whom the right of self-government could be safely conceded,
> we might at once…incorporate that territory and people into the Union…
> However, if the territory is inhabited by people of a wholly different character,
> illiterate, unacquainted with our institutions, and incapable of exercising the
> rights and privileges guaranteed by the Constitution and laws of the United
> States…it would be competent for the Congress to withhold from such people
> the operation of the Constitution and laws of the United States, and continue to
> hold the territory as a mere possession" (U.S. Senate 249, 56th Cong.,1st
> Session, pp.8-9; cited in Trías-Monge, p.41).

The previous statement is a simple illustration of the colonialist discourse and

the contempt of the colonizer in regards to the Puerto Rican people. It is a clear

corroboration of the colonial theory postulates (Fanon, 1967, 1969, 1986; Freire,

1990; Loomba 1998; Memmi, 2001; Prasad, 2005). It shows a discourse that

represents a piece of the puzzle that is the construction of the Puerto Rican identity

and self-concept. It also demonstrates that the intentions of U.S. leaders in regards to

the eventual political status of Puerto Rico were neither statehood nor independence,

but a self-governing dependency, subject to the plenary powers of Congress; which

continues to be the political status in the 21st century.

Although the military government changed to a civil one, up until 1946 the

appointed governors of Puerto Rico were natives of the US. Following the resignation

of former governor Rexford G. Tugwell in 1946, President Truman appointed Jesús T.

Piñero (the former Puerto Rican Resident Commissioner in Washington, D.C), as the first Puerto Rican governor. Two years later, in 1948, governor's elections were held for the first time in Puerto Rico. Luis Muñoz Marín became the first governor elected by the Puerto Rican people (Blanco, 1981, Méndez, 1980; Silén, 1995; Trías Monge, 1997). It is important to highlight that the governors appointed or supported by the US government, were unconditional to the U.S. command (Gallisá, 2010). As described by Freire (1990) and Memmi (2001), those who show high admiration for the colonizer will get their support.

Regardless of the changes in the US governance in Puerto Rico, the opposition to the national and international colonial rule was strong and intense. The Nationalist Party was very active, and so were students (Negrón de Montilla, 1998; Pousada, 1999). The decades from 1930's to 1950's have reached the peak for rejection of Washington´s colonial regime since 1898; but so did repression and persecution (Acosta, 1989, 2000; Bosque Pérez, & Colón Morera, 1997; Dietz, 1986; Gallisá, 2010; Seijo Bruno, 1997). The U.S. Government and Congress conceived their social and political action as a threat to the establishment. So did the recently elected governor, Luis Muñoz Marín (Beauchamp et. al, 1980; Gallisá, 2010; Nieves Falcón, 1972, 2002). The new Puerto Rican government with the US support implemented various ways to defuse the nationalist and pro-independence insurgents, and look for new international legitimacy for the U.S. regime in Puerto Rico (Acosta, 1989, 2000; Dietz, 1986; Rivera Ramos, 2001).

One of the steps taken by U.S. Congress to deal with insurgence and to prove the international community the alleged self-government in Puerto Rico was the Public Law 600. The application of Law 600 made available the establishment of a

Constitutional Government by the people of Puerto Rico (U.S. Congress, 1950). The law provided for the celebration of a referendum for the establishment of the new constitutional government and the development of a constitution in Puerto Rico (Méndez, 1980; U.S. Congress, 1950). However, in addition, the law established the process to be followed; including the mandate for a republican government and the inclusion of a bill of rights. It also declared the right of the U.S. president to submit the newly developed constitution to the U.S. Congress, and only if the constitution was in conformance with their Constitution, and after the Congress approval, it would be put into effect. Except for the article 5, the Jones Act, already in place, would continue to be in effect; but would be known as, the Federal Relations Act (CQ Almanac, 1950; Rivera Ramos, 2001; U.S. Congress, 1950).

Referendums, opposed to plebiscites, are used when extremely important matters are to be elevated to the constitutional status. These are usually responded with Yes or No. However, on their campaign to promote participation, the government may fall on co-option by over emphasizing the goodness of the proposal, and their negative effects if the opposite alternative wins (Nieto, 1999). In the U.S. and Puerto Rican government´s plan for the establishment of a Constitutional Government by the people of Puerto Rico, they established that a referendum was to be held first, followed by a constituent assembly that will eventually generate the constitution (CQ Almanac, 1950; Delgado Cintrón, 1977; U.S. Congress, 1950).

The Puerto Rican governor, Luis Muñoz Marín, supported by the US developed a very strong campaign overemphasizing the benefits of such referendum. The Law 600 was approved in the referendum held on June 1951. The referendum got the opposition of the independence party, plus 35% of general abstention. The

independence party did not participate in the referendum or the constituent assembly considering that the process was biased, and did not represent a real process of decolonization (Delgado Cintrón, 1977).

The referendum's participation consisted of 373,594 votes in favor and 402,695 votes either abstained or against. The constituent assembly was formed by seventy members of the *Partido Popular Democrático (PPD)*— political party in favor of the commonwealth—, fifteen favoring the statehood and seven of another wing of the statehood advocators. Regardless of the discrepancy on the participation in both processes, the US approved the Puerto Rican constitution. It was proclaimed on July 25, 1952, a date that marked the 54th anniversary of the U.S. invasion to Puerto Rico (Delgado Cintrón, 1977; **Méndez, 1980;** Rivera-Ramos, 2001; Silén, 1995; **Trías Monge, 1997**). Consequently, the UN General Assembly declared in 1953 that, "when choosing their constitution and international status, the people of Puerto Rico have effectively exercised their right for self-determination…" (United Nations Organization, 1953).

The newly established Puerto Rican constitution only has few differences with the U.S. constitution; the death penalty illegality being one of them. Yet, the Article VI of the Puerto Rican Constitution has been of major discussion and controversy in Puerto Rico due to the intention of the federal administrations to revoke or surpass the death penalty illegality (Barrios, 2005). Article VI of the constitution stipulates that the US Constitution, its laws and treaties are the supreme law of the Puerto Rican country; leaving the real power to establish rules and regulations in the territory and its properties to the US (Rivera Ramos, 2001).

Under the new pact, Puerto Rico is considered an unincorporated territory, meaning that Puerto Rico belongs to, but is not part of U.S. This political status implies that the U.S. Congress may exercise "plenary powers" over Puerto Rico, subject only to the restrictions imposed by fundamental individual rights as interpreted by U.S. Besides, the Congress can also legislate regarding the citizenship, foreign affairs, communications, labor relations, the environment, health, welfare, and many others (Rivera Ramos, 2001). Therefore, decolonization or post-colonialism in Puerto Rico is indeed a term signifying only a technical transfer of governance. Puerto Ricans cannot make their own major socio political and economic decisions. They have no representation in a congress that makes legislation for them, nor can Puerto Ricans vote for the U.S. President. National defense, exterior finances and relations, transnational capital interests, the coastal shipping laws, customs duty, immigration laws, education, research, salaries, syndicalism, policies and other domestic matters are determined by U.S. government or funds (Beauchamp, et al., 1980; Delgado Cintrón, 1977; Dietz, 1986).

To that effect, the *Partido Independentista Puertorriqueño* (*PIP*) [Pro Independence Party of Puerto Rico] submitted a document on August 7, 1953 to the United Nations Organization describing the condition of Puerto Rico. The PIP stated that, "Our people should not be removed from the list of the Non Self-Governing Territories since there has not been a constitutional change in the relations between Puerto Rico and the United States" (Delgado Cintrón, 1977, p.349). Equally, on September 30, 1953, the representative from India, in the UN Fourth Commission, V. K. Krishna Menon, stated,

We do not refute the right of Puerto Rico to hold any type of agreement

with the United States or any other country or countries. However, we

affirm, that can only be valid after the following two conditions are present

a) when Puerto Rico become completely independent of external pressures

at the moment of executing such agreement, and b)when the democratic

process, referendum or vote is performed in a complete atmosphere of

democratic liberty. My delegation is not certain that those two conditions

have been done in the way considered in the Charter….My delegation is not

convinced that Puerto Rico, under the present association with U.S. has

become an autonomous territory. In our opinion, there cannot be a free

agreement or association, fair or valid among two countries or territories

except on the base of equality. We believe that independence should

precede any volunteer association…" (Delgado Cintrón, 1977, p.356).

Groups ranging from nationalists to people who favor independence, statehood

or free association, as well as armed clandestine organizations, religious groups, civil

organizations, scholars, and the civil society, continue to make diverse efforts to

elevate the issue of colonialism to an international level and achieve the country's de

facto decolonization. Puerto Ricans persistently continue to present petitions to the

UN Decolonization Committee requesting the discussion of the Case of Puerto Rico,

and the re-incorporation of Puerto Rico in the list of Non Self-Governing Territories.

Petitioners also argued that, if the Committee of the 24 insists that Puerto Rico is de

facto a decolonized country, then they should recommend the General Assembly to

provide to Puerto Rico its own seat in the United Nations Organization (Delgado

Cintrón, 1977, p. 424).

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Many petitions and resolutions have been presented to the UN ever since their decision on 1953. Among the more recent ones, on June 14, 2007 the Special Committee on Decolonization approved by consensus a resolution calling on United States to "expedite a process that will allow the Puerto Rican people to fully exercise their inalienable right to self-determination and independence". It also requested the General Assembly to consider the question in all its aspects .The committee included in this resolution a comprehensive list of all the violations and control exerted by US to Puerto Rico and its people (United Nations Organization, 2007).

Once more, on June 20, 2011 the Special Committee on Decolonization calls on United States, in consensus text, to speed up a process allowing Puerto Rico to exercise self-determination. The Special Committee's resolution stated that the committee had adopted 29 resolutions and decisions on the matter over the course of 30 years and little progress had been made in settling the colonial situation in Puerto Rico (United Nations Organization, 2011).

In 2002, President Clinton created the President´s Task Force on Puerto Rico´s Status to examine proposals for Puerto Rico's future status and for a process by which Puerto Ricans could choose a status option. President Bush continued the task Force's sole focus on the issue of political status. In 2009, President Obama directed the Task Force to maintain its focus on the status question, but added the responsibilities of seeking advice and recommendations on policies that promote job creation, education, health care, clean energy, and economic development on the Island (White House, 2011).

The Task Force finished their job in March 2011. The main recommendation regarding status was that all relevant parties—the President, Congress, and the

leadership and people of Puerto Rico—work to ensure that Puerto Ricans are able to express their will about status options and have that will acted upon by the end of 2012 or soon thereafter (White House, 2011).

In reference to the aforementioned report, President Obama stated, "it is a road map to address the concerns and aspiration of the people of Puerto Rico", and added, "I am firmly committed to the principle that the question of political status is a matter of self-determination for the people of Puerto Rico" (White House, 2011).

The major recommendation of the task force on the status of Puerto Rico is still under discussion in Puerto Rico. Two previous referendums regarding political status were put together in the past, under similar conditions with no major effects on the colonial status. In a plebiscite held in1993, 48.4 percent of the people voted to retain the status quo, with close to 46.2 percent preferring statehood and 4 percent wanting independence. In 1998, however, when a "None of the above" category was introduced as an option besides status-quo, statehood or independence, 50.4 percent of those voting supported "None of the above" category. The results prompted former U.S. President Clinton to create the President's Task Force on Puerto Rico's Status aforementioned (United Nations Organization, 2011).

2.2.2 Economic Control

Economic interests might be the most noteworthy issue in a colonial context. Yet, it is tightly bound to political strategies, which in addition, intrude on the social construction of the people. Economy is basic for social progress, which should be measured more by environmental and social equality factors than by mere Gross Domestic Product (GDP) or per capita income (Marxuach, 2011).

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"Foreign domination and colonial control have given direction to Puerto Rico's socioeconomic development, have largely delimited its possibilities, and have conditioned and evoked the responses to it" (Dietz, 1986, p. 3). Supported by the country's colonial relationship with U.S., Puerto Rican economy has gone through multiple and rapid changes based on foreign capital to the expense of its own needs. It has gone from an agrarian economy to industrialization, from manufacturing to highly specialized technology and biotechnology, to pharmaceuticals industries. However, it has been a dependent economy forced to use the U.S. merchant fleet, and with the prohibition to make commercial pacts with other nations. The United States has set the political conditions to an easy path for their investors: custom duties, tax exemption and other incentives for inversion, cheap labor, and lastly high profit (Blanco, 1981; Dietz, 1986; Silén, 1995).

Taking advantage of the aforementioned benefits, U.S. companies established rapidly in Puerto Rico. Ford & Company, for example, settled in Puerto Rico immediately after US invasion, by October 1898. In less than a year, they became the principal investor of the *Central Azucarera Aguirre* (Aguirre Sugar Mill). An original inversion of $525,000 grew in five years to $2,000,000. Sugar became the predominant export crop and larger sector in the economy; about four US. Corporations controlled half sugar production (Dietz, 1986; Silén, 1995).

Simultaneously, the Puerto Rican dependence on imported goods for domestic consumption increased. Although Puerto Rico had an agrarian economy, it imported most of the groceries it consumes (Pantojas-García, 1990; Rivera-Ramos, 2001). Three years after US invasion Puerto Rico imported 78 percent of the products of U.S. corporations, an inversion of the 40 percent of the gross national income

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(Marcantonio, 1950; Silén, 1995). By 1910, 85 percent of Puerto Rican trade was with the United States; by1940 it was its ninth largest consumer, and the second largest in Latin America (Marcantonio, 1950; Rivera-Ramos, 2001). By the mid 1930´s, $1.00 of spending in Puerto Rico would create $2.00 of income in the US through import purchases and the multiplier effect (Dietz, 1986).

The commercial banking resources in Puerto Rico by 1930 were 82 million dollars. Over half of the banking was foreign owned: the National City Bank of New York, the American Colonial Bank, Royal Bank of Canada, and Bank of Nova Scotia. The rest belonged to Puerto Rican investors: the *Banco Popular*, *Banco de Ponce*, and the Roig Commercial Bank (Marcantonio, 1950; Silén, 1995). The American Colonial Bank was the first U.S. bank operating in Puerto Rico, which by 1901 was the second largest bank. US banks initiated a loan program for the "the qualified" borrowers, which turned out to be mostly American sugar company owners who had the collateral to back up their loan requests (Dietz, 1986).

The economy of the colonized countries usually gains a certain level of development; however, it is an unbalanced one, which ends in the worker's impoverishment, while the industries multiply their profits (Woddis, 1972). In 1930, a commission report from an institution in Washington D.C. concluded that,

> "while it cannot be denied that the influx of capital has increased efficiency of production and promoted general economic development, it does not benefit the working people of the island", the main beneficiaries of the process had been the US investors and some fractions of the Puerto Rican socially dominant class (Rivera Ramos, 2001, p. 60).

Decadence in the agricultural economy of the 1930´s and 1940´s produced a change in the economy model. The new model pursued the attraction of US private capital for manufacturing and industrial development based on new tax laws, incentives, cheap labor, unlimited trade with the U.S. market, and promotion. Shortly after, Puerto Rico was promoted as "the Shining Star of the Caribbean" with an industrialization model shown to the Caribbean as a model to follow (Thomas, 1988).

Puerto Rican government initiated Operation Bootstrap, a program that attracted 9,000 industries during 1950-1959. Initially, sugar grinding, needlework and textiles were responsible for 59 percent of manufacturing income. Eventually it incorporated construction of new factories and infrastructure, as well as petrochemical complex, pharmaceuticals and electronics (Thomas, 1988; Dietz, 1986). Not surprisingly by the end of twentieth century, foreign interests controlled 70 percent of industry in Puerto Rico (Varas & Serrano, 2003). In 1991, the scientific and professional instruments, electrical and nonelectrical machinery and pharmaceuticals industries accounted for 57 percent of the Island's gross domestic product (Green, 1997).

Puerto Rico then reached high rates of economic growth and domestic living standards. From 1950 to 1980, Puerto Rico´s per capita GDP, a traditional measure for the standard of living of people, nearly quadrupled (Collins, et al., 2006; Thomas, 1988; Weisskoff, 1985). Certainly, says Rivera Ramos (2001) the standard of living in Puerto Rico came to be higher than in many Latin American and Caribbean countries, although substantially lower than in the continental US.". Nevertheless, to do so, the Puerto Rican government has become extraordinarily dependent on federal monies in the form of grants, health and other welfare assistance, including student's loans and educational grants (Rivera Ramos, 2001).

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The Puerto Rican economic model was open to import and export, and dependent on foreign capital, government aid, and consumption styles (Weisskoff, 1985). Much of the profit generated by U.S. subsidiaries is not reinvested locally, but rather forwarded to the home company 1997). Data show that U.S. corporations increased their repatriated profit, getting 7.4 billion in profit during 1950-1977 (Colón Reyes, 2006). "Although the investment from U.S. firms and their subsidiaries may provide new production and employment, it also implies new subsidies and real infrastructure investment from the Puerto Rico Government and a larger amount of profits exiting Puerto Rico's economy." (Tobins, J, 1975, cited in Catalá Oliveras, 2000). The model increases colonial dependency, not only on capital investments but also in consumerism style. Hence, along with the high rates of economic growth and domestic living standards of the initial period of industrialization also comes the detriment of native entrepreneurship as well as a high increment in unemployment and migration rates (Thomas, 1988).

Still by the beginning of the 21st century, Puerto Rican economy responds to the interests of the multinational economy, which gets an abundant profit, in part due to sub-employment, slight workers benefits, in addition to a cheap labor reservoir that can replace workers easily. The Secretary of the Department of Family in response to the responsibility to establish the U.S. Social Welfare policy sponsored this situation by setting up an employment collaborative agreement for the department's beneficiaries (Barreto Cortez, 2004).

The GDP for U.S. in year 2006 was $46,000; compared to the GDP for Puerto Rico, which was $19,600 (Central Intelligence Agency, 2008). Compared to year

2010, while United States GDP increased to $47,200, Puerto Rican GDP decreased to 16,300 (Central Intelligence Agency, 2010).

The estimate per capita income (inflation-adjusted) for Puerto Rico in 2006 was $9,474, the median family income was $20,425; both figures are significantly lower than the same categories for US, which are $25,267, and $58,526 respectively. Puerto Rican income is less than half of Mississippi, the poorest state of U.S.A., i.e. $18,165 and $42,805. Almost half of the Puerto Rican population, 45.4%, was living below the poverty level, compared to 21.1% in Mississippi, who ranked first in the US. Puerto Rico ranked second on the percentage of households with cash public assistance with 5%, exceeded only by Alaska, with a 6.3% (U.S. Census Bureau, 2006).

However, the median housing value in dollars in Puerto Rico is $98,700, while in Mississippi; the most comparable state in terms of demographics is $88,600. On the other hand, 47.2% of mortgaged owners in Puerto Rico spend 30 percent or more of household income on housing, outnumbered only by California, which has a median household income of $56,645; compared to Puerto Rico with median household income of $17,621 (U.S. Census Bureau, 2006).

The years 2007 to 2010 represented the deepest depression experienced in Puerto Rico since the Great Depression of the 1930´s. Puerto Rico lost 41,000 jobs between April 2006 and December 2008. Double the figure, 91,200, jobs were lost within December 2008 to March 2011. During this period, the Governor Fortuño Economy Stabilizing Plan got into effect. Part of this plan was the implementation of the newly created Law #7 of March 9, 2009, which included massive layoffs to public employees (Quiñones Pérez, 2011).

During the years, 2009 and 2010 Puerto Rican GDP decreased -4 and -3.8 respectively (Benson Arias, 2011). In fact, the Moody´s Investor Service (MIS) degraded the government´s credit in August 2011 based on the aforementioned depression. Among the reasons for their decision, they mentioned that until the mid 2000s, Puerto Rico's economic growth direction tended to mirror that of the US. Nevertheless, by 2006 Puerto Rico has remained in a recession with very low improvement, which reflects essentially a weak economy that is not likely to be able to absorb any additional stress. In addition, the MIS took into consideration for their decision Puerto Rico's high unemployment rate, which was 16.9 percent in March 2011 as well as the low workforce participation, which consisted of 40.6 percent. Also the country´s high poverty levels, compared to the low average income, which is below 50 percent relative to the U.S. median was considered (Moody's Investors Service, 2011; Quiñones Pérez, 2011).

Imperialist governments restructure the colonial economy and society in a way, that they eventually fall in a complex dependent relationship with the colonial power, says Prasad (2005). To that respect, Tomás Blanco stated in 1981,

> "Politically we have served as a laboratory animal for the sovereign nation, in which it has practiced the real living experiments of colonialism… If it is true that neither the State nor US's people has made direct profit of our misery; it is also true that to some personal interests in particular, and the US industrialization in general, we have served as an infinitely source of wealth, with serious damage to our impoverished population" (p.p.129-130).

2.2.3 Military Control

Puerto Rico not only contributed to U.S. development with the use of the land and people for economic purposes, but as a reservoir for army drafting as well. Over 200,000 Puerto Ricans served in the U.S. armed forces during the 20th century (Rivera Ramos, 2001). Puerto Rico sent 65,000 men to the World War II in the 65th Infantry Regiment (Silén, 1995). The 65th Infantry Regiment, said Silén (1995) can be classified in the category of the colonial army; compared to the Cipayos that England had in India, the Senegalese for France in the World War I, or the regiments of the French Army, composed basically of Africans or indigenous of other colonies.

Even though Puerto Rico has no international problem with any country, 43,000 Puerto Ricans were sent to fight in the Korean War. The Puerto Rican casualties are usually proportionally higher than those of the US. Puerto Rican soldiers in Korean War have 3,540 casualties in the form of wounds, disappearance or death. One of every 42 casualties of the US troops was Puerto Ricans; the rate for casualties was 1 out of 660 inhabitants of Puerto Rico, compared to 1 out of 1,125 for the US. Service was compulsory for Puerto Ricans during the Vietnam War; wounded Puerto Rican soldiers during that war consisted of 1,300. Whereas 56 percent veterans suffered mental disorder, 345 were killed (National Archives, 2007; Rodríguez Beruff, 1988; Silén, 1995).

Participation in the armed forces has been compulsory in the past; those who resisted were at risk of being incarcerated (Beauchamp, et al., 1980). However, even though joining the armed forces might be considered now a volunteer decision, such statement deserves further analysis. Army recruiters in Puerto Rico sustain their recruitment on a work, study, and travel campaign; usually directed to high school

students, with the support of the Department of Education. Considering the high rate of unemployment, for people living under the poverty level, and undesirable economic conditions, the opportunity to work, study, and travel are very persuasive offers. Army drafting was in many cases an excellent way for Americanization or psychological colonialism (Beauchamp, et al., 1980; Rodríguez Beruff, 1988).

2.2.4 Migration

Migration is a socioeconomic issue intrinsically related to colonialism; push and pull factors has provoked a circular migration of Puerto Ricans to the US. Migration has been at certain periods a "steam valve" for the economic constraints in Puerto Rico, concurrently it has also been an influx of cheap labor to the US.

Before the implementation of the Jones Act, in 1910, US census counted 1,500 Puerto Ricans living in US. However, it is estimated that in the 1940s it reached the amount of 470,000 (Nieves Falcón, 1972). During the 1950s, with the support of the first Puerto Rican elected governor, Luis Muñoz Marín, Operation Bootstrap came into effect in Puerto Rico. Operation Bootstrap along with other factors provoked a mass migration of laborers into the agrarian fields of US especially Hawaii, New York and other Northeastern states. Among other consequences, this migration trend provoked a relieving effect to the already impoverished Puerto Rican economy (Dietz, 1986, Glasser, 1997; Morales, 1986; Rivera Ramos, 2001). By 1970, close to a million and a half people of Puerto Rican descent was living in the United States (Rivera Ramos, 2001).

Young Adalberto Pereyó was among the early Puerto Rican migrants. His story describes in a few words the migration and economic concerns previously presented.

"The day I graduated from San Juan Central High School I had the ticket to come, here in my pocket", he remembers. "I came here on June 23rd, 1927." Pereyó worked in New Departure for a year and a half before getting homesick and returning to Puerto Rico; he was soon back in Meriden, however. "Jobs were scarce on the island, and the pay was a fraction of what one could earn in Connecticut." His job as a mechanic for Singer Sewing Machines in Puerto Rico paid ten dollars per week. At New Departure, he earned thirty-three (Glasser, 1997, p.35).

Many retired soldiers also decided to settle with their family on the land for which they risked their lives. Likewise, considerable large numbers of other Puerto Rican workers or their descendants are permanently living in the US others are constantly moving back and forth from US. to Puerto Rico (Duany, 2002; Glasser, 1997; Juhász-Mininberg, 2004; Morales, 1986; Rivera Ramos, 2001). The Puerto Rican migration and political status has developed a community that as stated by Juhász-Mininberg (2004), in spite of the geographical location away from Puerto Rico, and a growing number of new generations speaking Spanish as a second language, in general, preserve a strong bind of cultural identity with Puerto Rico. A migration pattern that is very similar to "*La Guagua Aérea*"3 (Duany, 2002).

Yet, the migration profile tendency in Puerto Rico has changed to one of professionals or quasi professionals who either cannot find jobs in Puerto Rico or else are seduced by promises of higher salaries and better living conditions (Nieves

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3 *La Guagua Aérea* (The flying bus) is an essay written by Puerto Rican famous writer Luis Rafael Sánchez, which was then popularized in a movie by Luis Molina Casanova. Everything happens in a flight going from Puerto Rico to New York. In a funny way, it deals with Puerto Rican circular migration of the mid 20th century, and the national identity and traditions present in the Puerto Ricans living in and out of Puerto Rico.

Falcón, 1972). It is common for the National Aeronautics and Space Administration (NASA), or other highly specialized industries in the US. to recruit almost or recent graduates of the University of Puerto Rico, College of Engineering. These professionals have demonstrated that though very well educated, they are willing to accept entry-level jobs and salaries. Actually, there were a hundred and eighty-one Puerto Ricans working in the NASA in 1988, most of them on high rank positions (Rivera Vargas, 2008). This is a trend known as the brain drain, which can be seen also among other professionals such as physicians, researchers, and professors (Nieves Falcón, 1972; Rivera Vargas, 2008).

During the decade 2000-2010 the Puerto Rican population in the US grew by 36 percent, increasing from 3.4 to 4.6 million (U.S. Census Bureau, 2011). Puerto Rican population in the US in the last four years increased from 3,987,947 in 2006 to 4.6 million in 2010 (U.S. Census Bureau, 2011) In contrast, Puerto Rico´s population has decreased from 3,927,776 in 2006 to 3,725,789 in 2010, including people of other ethnicity living in Puerto Rico (U.S. Census Bureau, 2006; 2010). As can be seen, by 2006 there were more Puerto Ricans living in the US than in Puerto Rico.

2.2.5 Political Repression, and Resistance to Colonial Rule

The colonizer enjoys democratic rights while denying them to the colonized. The colonizer who is swollen with pride for their country's independence and sovereignty denies self-determination to their colonies (Jean- Paul Sartre, in Memmi, 2001). US officials and agencies as well as the Puerto Rican government have historically suppressed support for independence in Puerto Rico. Innumerable examples of political repression, show of force and human and civil rights violation has been displayed by local and federal government, i.e.: Governmental Officers,

Puerto Rican Police Department, Central Intelligence Agency (CIA), Federal Bureau of Investigation (FBI), and the U.S. military forces. The magnitude of the actions goes from subtle ways such as discredit and jobs denials to incarceration, and even assassination (Fernandez, 1987; Rivera Ramos, 2001).

The Puerto Rican police, following governor's Blanton Winship orders, attacked a peaceful unarmed nationalist demonstration in Ponce, on a Palm Sunday of 1936. Nineteen people were killed and 100 wounded; this is remembered as *La Masacre de Ponce* (Ponce Massacre) (Delgado Cintrón, 1977; Medina Vázquez, 2001; Nieves Falcón, 1993, 2002; Rivera Ramos, 2001).

The Law #53, known in Puerto Rico as *"Ley de la Mordaza"* (the Gag Law), was adopted in 1948, with the provision of protecting the people of Puerto Rico from the claimed violence of the supporters of independence (Acosta, 1989; 2000; Bosque Pérez & Colón Morera, 2006). This law was a Puerto Rican version of the infamous American Smith Act of 1940 (Bosque Pérez & Colón Morera, 2006; Rivera Ramos, 2001).

For many years, the Puerto Rican Justice Department kept files, known as *Carpetas*, on persons who were known or suspected to be independence fighters or supporters. *Carpetas* was also created on any known or suspected socialists, sindicalist, feminists, environmentalists, or members of any other legally constituted social or political organization or movement. The information were collected through undercover agents, police informers, job supervisors, co-workers, relatives and neighbors; a perfect systematic pattern of persecution (Bosque Pérez & Colón Morera, 1997; 2006; Comisión de Derechos Civiles, 1997; Rivera Ramos, 2001).

The Puerto Rican constitution has been treated with despised and violated on occasions. An example of it was the F.B.I. phone calls taping; an operation prohibited by the Puerto Rican constitution (Fernandez, 1987). The attempt for the capital punishment application in Puerto Rico is another challenge to the Puerto Rican Constitution, evidence of the country´s colonial status. The latest has provoked social demonstrations, especially after the Federal Death Penalty Act (FDPA) of 1994 approval in United States (Barrios, 2005; Bernabe, 2001).

An incident that provoked indignation from Puerto Ricans and the international community was the assassination of Filiberto Ojeda Ríos on 2005. Ojeda Ríos was the utmost leader of the pro-independence clandestine organization *Los Macheteros* (The Machete Wielders). The F.B.I. selected September 23, the day where Puerto Rican independence movement celebrates *El Grito de Lare*s (a shout of independence from Spain) for his trap and later assassination. This coincidence added to the feelings of outright anger on part of the Puerto Rican population (Red Nacional Boricua de Derechos Humanos, 2005). Few, months later, the F.B.I. forcefully penetrated the homes of some independence leaders, and attacked the reporters who were covering the incident with pepper gas and other assault means (American Civil Liberties Union, 2006; Amnesty International USA, 2007).

The first decade of the twenty-first century ended up with a human and civil rights crisis in Puerto Rico. The crisis comprise of tens of thousands public workers been laid off and their union contracts terminated. Furthermore, patterns and practices of violent police misconduct resulted against the citizens of Puerto Rico including the homeless population (American Civil Liberties Union, 2010, 2010b; Amnesty International, 2010; U.S. House of Representatives, 2011).

Extreme police brutality was carried out against students of the University of Puerto Rico (UPR) who were involved in a pacific strike in opposition to an enrollment fee imposed by the UPR Administration. The government of Puerto Rico activated the Riot Squad, and the Special Weapons and Tactics (SWAT) Division on several occasions. Besides been beaten, pepper sprayed, and shot at with rubber bullets, the police also applied torture techniques on immobilized student protesters, including the application of pressure in the neck, eye and jaw as well as the use of Tasers (American Civil Liberties Union, 2010, 2010b, 2010c; Amnesty International, 2010; U.S. House of Representatives, 2011).

Freedom of speech has also been in jeopardy. Not only the silence imposition was attempted towards the students in the UPR, but also the Government proceedings were closed to the public. Protestors at the legislature and at the Sheraton Hotel were pepper sprayed, and beaten by police. Governor Luis Fortuño, and the former Chief of the Puerto Rican Police, José Figueroa Sancha made the statement that they will not allow protests and expression from what they call the "extreme left". The Puerto Rico Bar Association, a forum viewed as dissent against the government, was de-certified through legislation, and the President of the organization incarcerated when he assumed his duty of informing his constituency about the possibility of such situations (American Civil Liberties Union, 2010, 2010b, 2010c; Amnesty International, 2010; U.S. House of Representatives, 2011).

The American Civil Liberties Union (ACLU) requested an investigation to de US Department of Justice (USDJ) on May 2008 regarding pattern and practice of violent police misconduct against the citizens of Puerto Rico. On March 10, 2011, the ACLU sent a letter to the Assistant Attorney General alerting him of the recent

aforementioned human and civil rights violations in Puerto Rico, and urging for a prompt close of such investigations and the issue of a report and findings. On September 5, 2011, the US Department of Justice, Civil Rights Division published a report consisting of 143 pages (ACLU, 2010a).

The USDJ report stated that the PRPD "has broken in a number of critical and fundamental respects that are clearly actionable under the Violent Crime Control and Law Enforcement Act of 1994, 42 U.S.C. § 14141 ["Section 14141"]" (U.S. Department of Justice, 2011, p.5). Overall, the report confirms chronic institutional and systemic deficiencies that directly contribute to repeated violations of the Constitution and federal law. They specifically mentioned, among others: acts of crime and corruption in the PRPD, violation of the free speech rights of demonstrators and the press when faced with public demonstrations.

It includes 133 measures necessary to remedy Puerto Rico Police Department's pattern of constitutional violations. It encourages the Commonwealth of Puerto Rico, the PRPD, and the University College to "act decisively, transparently, and immediately to restore the public's trust and correct PRPD's pattern of unconstitutional policing" (U.S. Department of Justice, 2011, p. 110).

As stated by Ife (2007) and Gil (1998) colonialism breeds resistance, likewise, the violence embedded in colonialism may also generate violence. So, resistance to colonial rule is usually manifested in two distinct but overlapping approaches; one being the writings of colonized peoples, condemning all forms of colonial rule and expressing serious reservation about the colonial relationship. The other approach is the nationalist's political movements that seek to overthrow different colonial powers,

or the civilian people requesting participant democracy, in an attempt to replace the status quo with local autonomous government (Prasad, 2005).

In Puerto Rico, resistance has been manifested in two different ways, as Prasad (2005) describes it: those who use the verb and diplomatic manners, and those who fight back with arms or other social actions. Some Puerto Rican social workers have been social activists in both approaches. Isabel Rosado Morales, as well as the deceased Blanca Canales Torresola and Carmen Rivera de Alvarado are some of the pioneer anti-colonialist social workers; many more has come after them (Burgos Ortiz, 1998; Rivera de Ríos, 1986; Seda, 2006, 2010).

It is evident that some Puerto Ricans favored the arrival of the United States Government in Puerto Rico, helped with the establishment, and even with persecution to the independence advocators. However, there is vast support to the fact that also resistance was noticeable even before 1898 (Delgado Cintrón, 1977; Dietz, 1986; Gallisá, 2010; Seijo, 1997). Eugenio María de Hostos founded the *Liga de Patriotas Puertorriqueños* (The League of Puerto Rican Patriots) in 1898, on the premise of working towards Puerto Rico self-determination (Seijo Bruno, 1997). On the other hand, José A. Maldonado, a.k.a. Águila Blanca, was one of the first Puerto Ricans leaders who organized a movement and confronted the American Army using sticks, machetes and guns. Other rebellious manifestations took part in different towns of Puerto Rico (Bryan, 1899; Seijo Bruno, 1997).

When a group of university students made a petition for the independence of Puerto Rico to the U.S. House of Representative in 1919, the Commissioner of Education in Puerto Rico, Paul G. Miller, requested from the University of Puerto Rico a list of all the petitioners who were students in the Faculty of Education. The

commissioner attempted to block them from teaching in Puerto Rico, *"as their loyalty to the U.S.A. was in doubt"* (Negrón de Montilla, 1998; Pousada, 1999).

Several altercations took place among students and officials of the Department of Instruction due to the use of the Puerto Rican flag in the 1920s (Negrón de Montilla, 1998; Morris, 1995). In a graduation activity at the Central High School in Santurce, students displayed the unofficial flag of Puerto Rico, immediately, the Commissioner of Education asked to remove the "enemy's flag" from the theater. Students responded that they would desist if the US flag were removed; the police were called to handle the situation. Similar events took place during commencements in Caguas, Vega Alta, and Fajardo. In Caguas and Vega Alta, the acts where suspended; in Fajardo, students and administration agreed to fly neither the Puerto Rican nor the US flag (Negrón de Montilla, 1998).

Resistance got stronger during the decade of 1930 (Carr, 1984; Rivera Ramos, 2001). The most direct, radical and organized challenge to the legitimacy of colonial rule was put together by the President of Nationalist Party, Pedro Albizu Campos; a Harvard graduate, lawyer and distinguished ex-member of the US Army (Acosta, 2000; Albizu-Campos Meneses & Rodríguez León, 2007; Bosque Pérez & Colón Morera, 2006; Rivera Ramos, 2001; Seijo Bruno, 1997).

Following the tendency of the Resistant World anti-colonial movements, the Nationalist Party opted for the armed struggle for liberation. They opted to follow confrontational tactics that would lead the United States to relinquish its control over Puerto Rico, to which the colonial regime responded with violence and more repression.

A strike at the University of Puerto Rico, initiated by an incident among students of the Río Piedras Campus and its Vice-chancellor, in relation to the raising of the Puerto Rican flag and the intention to receive the nationalist leader Pedro Albizu Campos as a speaker, was the imminent argument for the adoption of the Gag Law (Acosta, 1989). The pioneer social worker, Carmen Rivera de Alvarado, who worked at the *Junta de Servicios al Estudiante* (Student's Service Board) of the University of Puerto Rico and supported the students, was consequently dismissed from her position (Rivera de Ríos, 1986).

The Gag Law established that the use of the Puerto Rican flag was as a crime (Acosta, 1989; Rivera Ramos, 2001; Silén, 1995). Two other pioneer social workers, Isabel Rosado Morales and Blanca Canales Torresola were incarcerated on charges of violating the Gag Law (Burgos Ortiz, 1998).

In 1950, the Nationalist Insurrection took place in Puerto Rico and in the United States. Among other armed struggles, members of the nationalist party attacked the Blair House in Washington, D.C, the U.S. House of Representatives of the US Congress, and the Puerto Rican Governor's House, *La Fortaleza* (Delgado Cintrón, 1977; Seijo Bruno, 1997).

The US military role in Puerto Rico was questioned in the 1970's. Anti-militarism movements called for the withdrawal of the US Navy from Culebra. Dozens were arrested and indicted for their participation in acts of civil disobedience (Bosque Pérez & Colón Morera, 2006).

After they surrendered, two young pro-independence activists were ambushed and killed by the Puerto Rican Police on July 25, 1978 (Aponte Pérez, 1995; Bosque Pérez & Colón Morera, 2006; Carr, 1984; Cripps, 1982; Rivera Ramos, 2001). The

former Governor of Puerto Rico, Carlos Romero Barceló, member of the *Partido*

Nuevo Progresista (PNP), a pro-statehood party, proclaimed those police officers as

heroes (Carr, 1984; Suárez, 1985). Years later, the officers were incarcerated on

charges of conspiracy to cover up the beating and shooting of two young activists in

1978 (Suárez, 1985; Stuart, 1984).

On April 19, 1999, an off target dropped bomb killed a Puerto Rican civilian

guard, David Sanes Rodríguez, in the Navy's training ground on the municipal island

of Vieques. This tragedy moved the people of Puerto Rico, with the support of the

international community, to query once more the role of the US military forces in

Puerto Rico. People from all spheres, including international supporters, were united

to demand the ending of live bombings, the Navy's exit, and the return of the land to

the civilian people of Vieques (Arbona, 2005; Bosque Pérez & Colón Morera, 2006;

Duany, 2002; Rivera Ramos, 2001). The fight for the end to live bombings and the

Navy's exit from Vieques was held utilizing a pacific civil disobedience approach.

Many pacific civil activists, including US Congressman, local and international

artists, politicians, religious representatives and thousands of other men and women

were arrested. The Navy finally relinquished on May 1, 2003, but left behind a

contaminated and depleted land (Aljazeera, 2011; Arbona, 2005).

2.2.6 Social Impact and Identity

The effect of the ancient colonial rule in Puerto Rico is not only political,

judicial or economic; it is also cultural, particularly that which has to do with national

identity. National identity has to do with the nation of origin. However, the nation

concept is at times confused with the Nation State concept. Nation State refers to a

political condition; a nation is not a Nation State until it achieves self-determination

and sovereignty (Ander-Egg, 1988). Nation, on the other hand is a socio-cultural construct in which members of a human group are tied by ethnic, historic, linguistic and cultural bonds. Its members share common customs, traditions, and sense of belonging to the group and territory as well (Ander-Egg, 1988; Rivera Ramos, 2001).

Although Puerto Rico might not be consider a Nation State by definition, Duany (2002) considers that after 100 years of hegemony, Puerto Ricans yet today display a stronger cultural identity than most Caribbean people do (Ander-Egg, 1988; Merriam-Webster, 2000). Puerto Rican national identity presents the paradox of a stateless nation that has not assimilated into the American mainstream (Duany, 2002). Furthermore, Juhász Mininberg (2004), and Duany (2002) affirm, that the national identity concept has become a theoretical and practical challenge in regards to Puerto Ricans, because they are a heterogeneous group, which has no particular and clear geographical space or common language, nor are they a sovereign Nation State. Duany's and Juhász Mininberg arguments are based on the Puerto Rican migration pattern and its outcome.

Nationalism is the fondness of the natural born of a nation to their nation and everything that belongs to it: ideology or feeling of praise to a nation, their common past, present solidarity, and future aspirations (Ander-Egg, 1988). Nationalism serves to the emotional and psychological demands of the people of a country, and is expressed by symbols and rituals (Crespo, 2003). Love for the land and ethnic group, as well as to the cultural history, desire of political independence, safety and prestige of the nation; and at times xenophobia and ethnocentrism are among those characteristics of nationalism (Shafer, 1962,).

Whereas the nationalism of the oppressive countries has lead to arms buildup, chauvinism and racism, the nationalism that emerges in dependent nations is one of liberation. In the Resistant World countries, nationalism has served as support for national liberation and protection of national independence (Ander-Egg, 1988). In Puerto Rico, affirms Juhász-Mininberg (2004), the nationalism represented through culture has been the constructed element of difference between Puerto Rico and the US. It has become the element of resistance to the threat of cultural assimilation under a colonial domination. In spite of over 100 years of colonialism and US hegemony, there is a very strong Puerto Rican identity and sense of Puerto Rican pride. Silén (1995), describes Puerto Ricans as "one of the people of the Caribbean who refused to renounce to their mixed blood identity and to their definition of nation and *patria* (motherland).

Nationalism and national identity are concepts that overlap at times. A number of Latin-American scholars agree that the national identity concept is composed of objective and subjective realities. The objective realities are composed of historical background, ethnicity, and economic, politic, geographic and cultural conditions. It includes language, religion, traditions and lifestyles. The subjective realities, are described as individual perceptions, cognitions, attitudes, affects, and internalized consciousness and assumptions of belonging shared by members of a group or nation (Ander-Egg, 1988; Crespo, 2003; Rivera Ramos, 1998).

There are also two definitions of such identity, the popular and the official. The popular definition, describe the forms, reasons and motivations that people have to be identified as a member of a particular nation. This process involves a strong affective

component, which identifies them with things, feelings, and ties that bind to a subjective and objective identification.

The official identity conversely is an endorsed definition of identity created and spread by the governmental power. This is an ideological definition of the meaning of national identity. The official definition is disseminated generation after generation through formal and informal history and official governmental documents, with the purpose of perpetuating the political ideal of national identity (Rivera Ramos, 1998).

The formal and popular definitions of national identity in Puerto Rico have clashed several times, rousing people's reaction. A former governor of Puerto Rico, representative of the PNP, stated in 1996, "Puerto Rico is not a nation". Such a statement provoked a deep indignation from the people of Puerto Rico. To affirm their nationality, people from different political, civic and religious background organized and participated on a massive march denominated the *La Nación en Marcha* (The Nation on the move), shouting that Puerto Rico is indeed a nation).

After almost a hundred years of US colonialism and hegemony, a survey conducted on 1993 for the *Ateneo Puertorriqueño*, a highly respected cultural and educational institution in Puerto Rico, reported that 97.3 percent of the subjects answered that they regarded themselves as Puerto Ricans. Those who believed Puerto Rican culture is "very different" from American culture, comprised a 56.2 percent, in addition to 30.9 percent who believe it is "different". Likewise, 78.3 percent held the opinion that it was "extremely important" for Puerto Ricans to preserve their national identity. Language, regardless of many attempts for it annihilation, is probably a key element for the Puerto Rican identity, 93.3 percent would not relinquish Spanish as

their language if Puerto Rico ever became a state of the U.S.A. (Hispania Research Corporation, 1993).

Paradoxically, in Puerto Rico a strong national identity is bind to an imposed model of "the American way of life", which essentially means giving up the particular and natural Puerto Rican being, to perform a superficial way conformed by an unfamiliar reality. It is said that, the higher social class are the best-adapted ones, because they adapted more easily to the imposed model to climb the socioeconomic ladder, (Rivera Ramos, 1998).

This reality has been manifested with the well-received and celebrated US traditions, which is foreign to the culture, especially that which has to do with snow and characters of template zones. During some periods and geographic areas, it has substituted most of the native traditions or have developed a hybrid of both; a reality very much promoted by the market, and the school system (Rivera Ramos, 2001; De Granda, 1972).

The results of a study conducted to examine the contemporary Puerto Rican identity among the Puerto Rican political leaders showed concerns regarding the influence of Santa Claus pushing aside the original Puerto Rican Christmas characters. The fear that Santa Claus would displace the Three Kings made this symbol perceived as a threat to Puerto Rican identity. Representation of the three major political party's within the legislative house were selected for the research sample. The aforementioned results were true regardless of political ideology (Morris, 1995).

2.2.6.1 National Symbols

Symbols, such as flags, national coat of arms, and anthems bring identity, unity and solidarity to the members of a country. They serve as emotional and psychological links to their people (Crespo, 2003). In Puerto Rico, children are introduced to these symbols, specially the Puerto Rican flag and traditional songs, very early in their lives.

The Puerto Rican flag was designed in 1895 and increasingly used by liberals and independence supporters as opposition to the US rule (Rosario Natal, 1989, cited in Morris, 1995). As previously mentioned this symbol has provoked numerous clashes, and have been used as a symbol of resistance. The flag was banned and considered illegal by the colonial government. Furthermore, the colonial governor Montgomery Reily called it "*a dirty rag*" (Morris, 1995). However, it has become one of the most, if not the most, important symbols of the Puerto Rican community in Puerto Rico, and elsewhere.

The Puerto Rican flag is portrayed in many articles, including baby clothes, and in many instance they include nationalist statements such as *Mi orgullo (My pride)*; *100% Boricua; Boricua, hasta en la Luna (Boricua* even in the moon)*, the latest primarily in reference to the Puerto Rican Diaspora. The results of a study about national objects and symbols showed that, overall, people believe that the Puerto Rican flag is more beautiful than the US flag (Rivera Ramos, 1998).

National anthems are symbols that praise and encourage the nationalism of the countries. They emerge and evolve with the country's political path, and usually reflect their political history. Their lyrics frequently sing the praises of the national army and defense of the frontiers or land (Crespo, 2003). Puerto Rican anthem is

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another symbol that has been affected by U.S. hegemony. Puerto Rico had a Revolutionary Anthem, which claims for the armed unity for liberation, written by a Puerto Rican poet, Lola Rodríguez de Tió. US government banned the revolutionary anthem and the lyrics changed in 1903 by Manuel Fernandez Juncos. The Commonwealth government of Puerto Rico adopted the new version of the anthem as the official anthem (Morris, 1995). Contrary to the original one, this anthem praises the Spanish colonization and the beauty of the island. Under the US rule, the ELA's anthem is to be interpreted followed by the Star Spangled Banner. However, a shorter version of the original revolutionary anthem is still in use in the pro-independence movement activities in Puerto Rico and in US.

Besides the flag, a wide variety of music and songs might be the elements mostly used to show nationalism, cultural identity, and even tell about national history and major events. There are countless songs and poems referring to the *patria*. Innumerable songs regarding Puerto Rican pride are popular and learned by new generations very early in their developmental stage. Puerto Rican music was another symbol highly appreciated in the study about national objects and symbols realized by Rivera Ramos (1998).

In the study about national objects and symbols conducted by Rivera Ramos, she asked her sample of one hundred randomly selected subjects, to develop a series of teaching modules. Different resources representing Puerto Rican national symbols and folk music, as well as resources representing U.S. culture were given to the subjects. A comparison between people from rural and urban areas was made. The results showed that 95 percent of the people from rural areas chose Puerto Rican national symbols, and 100 percent chose Puerto Rican folk music; compared to 40

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percent people from urban area choosing U.S. national symbols, 50 percent U.S. music (Rivera Ramos, 1998).Puerto Rico has its own international Olympic team representation, which is another element of strong identity and emotions in Puerto Rican. Although Puerto Rican athletes can participate in US teams, it is seen as a betrayal to the Puerto Rican community if their athletes choose to represent US in international competence. That was the case of Jesús Chayanne Vasallo in the memorable Pan-American games celebrated in Puerto Rico on 1979. (Figueroa Cancel, 2009, Lugo Marrero,[n.d.]; Uriarte González, 2011). In fact, in a focal group realized by Nancy Morris in the aforementioned research, sporting events came out as the third most important contemporary identity symbol among the Puerto Rican political leaders. One of the participants expressed that "participation in international sports competitions was the only expression of our uniqueness that can be legitimately exhibited internationally" (Morris, 1995, p.164).

Varas Díaz and Serrano García (2003) conducted a study to explore the emotions associated to national identities, and the relationship to manifestations of oppression in a colonial context within a group of Puerto Ricans high school students. The researchers found that situations that promoted positive emotional responses in relation to national identity included watching and participating in sporting events. Also, occasions when Puerto Rico's name was held high, defending what they considered Puerto Rican.

2.2.6.2 Education and Language

Education in a colony might be one of the most effective ways to enforce hegemony. The school system in Puerto Rico operated towards the inferiority of the Puerto Rican culture, and the process of Americanization. Juan José Osuna (1949)

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affirmed that the objectives of the school system then were the assimilation to the American culture and language. The language controversy came up with US intervention; they subjugated the public school system to teaching in the English language for over 40 years (Berbusse, 1966; Blanco, 1981; Dietz, 1986; Negrón de Montilla, 1998; Pousada, 1999; Silén 1995). Silén (1995) described the hegemonic attempts of the department of education as "an unnatural and anti-pedagogical system, which only primary purpose was, through education, destroy the Puerto Rican nationality; besides, producing a society which know both languages deficiently" (p.172).

Language is vital in the construction of individual and collective identities (Morris, 1995). A struggle to implement back the native language to the school system was raised by Puerto Rican teachers, university students, and the Teachers Association. This was a courageous act considering they were openly threatened with losing their jobs or positions because of what was considered a disloyalty to US (Hispania Research Corporation, 1993; Negrón de Montilla, 1998).

In the study realized by Morris (1995), respondents identified language as central to their sense of identity. Respondents repeatedly referred to the attempt from U.S. to impose English as the language for instruction in Puerto Rican schools. "Across the political spectrum, interviewees and focus group participants emphasized that English had not displaced Spanish, despite US' efforts to that end" (Negrón de Montilla, 1998, p. 144).

Besides imposing a foreign language, the school system in Puerto Rico forges history as well. The school system in Puerto Rico under US rule emphasizes the "smallness" of everything that is Puerto Rican. It develops the theory of the

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"limitations", "the defenselessness", internalizing the limited and inadequate Puerto Rican culture compared to the "big" and "powerful" US. The alleged lack of natural resources is one of the arguments commonly used to support US dependency. It is common to hear people saying that: "without US Puerto Ricans will die of hunger due to the lack of natural resources" (Blanco, 1981; Negrón de Montilla, 1995; Silén 1995). In fact, in Rivera Ramos' study, many Puerto Ricans awarded to United States what they perceived as Puerto Rico's economic wellbeing. They also added that Puerto Rico could not survive without the federal financial assistances (1998). The aforesaid statement is a common one in the Social Studies books in the Puerto Rican education system, along with the portrayal of Puerto Rico as "a dot in the map", incapable of independent sustainability.

2.2.7 Psychological Impact

Having a positive self-concept and high self-esteem are congruent with mental health (Aiken, 1997). A combination of internal and external forces drive psychological thought construction. The external forces are essentially socio-historic, political, cultural, and geographical, in conjunction with the availability or lack of availability of resources or services (Lazarus, 1971; Rivera Ramos, 1998; Rivera Ramos & Acevedo, 1985). Yet, the external forces are processed, interpreted and transformed by the internal ones, which include the biological inheritance, cognitive processes, affection and emotions (Granvold, 1994; Lazarus, 1971; Rivera Ramos, 1998).

The most known emotions considered as determinant factors for personality development are: fear, guilt, shame, sadness, envy, happiness, pride, and love (Lazarus, 1971). In addition, human beings define who and what they are in

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comparison with others (Tajfel, 1978; Varas Díaz & Serrano García, 2003); a social

identity that is composed of the sense of group belonging, associated emotions, and

the characteristics attributed to the group (Lazarus, 1971; Liebert, et. al. 2000; Tajfel,

1978; Rivera Ramos, 1984). Being part of a group can be seen as either positive or

negative, depending on the characteristics that gets attributed, and the emotions that it

will generate" (Varas Díaz & Serrano García, 2003). Thus, those mainly negative,

distorted interpretations in a colonial territory will have a direct effect on the emotions

and self-image of the colonized (Fanon, 1967, 1986; Freire, 1972; Memmi, 2001).

2.2.7.1 Self-concept

Self-concept is the person's conception of oneself, own identity, abilities,

worth, etc. It helps people acknowledge the integration of cognitive, affective,

changes and transitions as part of a healthy development of self. Self-concept

however is not always positive. A negative self-concept, says Granvold (1994) may

produce cognitive distortions, produced by socialization that is characterized by a

lengthy history of faulty information processing in relation to themselves, others,

events, and life situations.

Negative self-rating is a major cause of human disturbance, innumerable

problems result when people fail to value themselves. Among the identified

consequences is diminished appraisal of their successes, a strong demand to prove

themselves, constant seeking of approval, self-sabotage of their potential

achievements, obsessive comparisons with other, depression, among others

(Granvold, 1994).

Colonialism is a determinant factor in the construction of self-identity and self-

concept of any human being who lives that reality (Prasad, 2005, Rivera Ramos,

1998). The portrait of the colonized, described by Memmi, is an image imposed to the point where the construction of psychic thoughts is distorted. Through that distorted construction the colonized start by doubting, latter accepting and then live upon the superiority image of the colonizer (Freire, 1990; Memmi, 2001; Rivera Ramos, 1998).

Revision and analysis of the literature written by many historians, writers, politicians and educators, about the Puerto Rican personality corresponds to the internalized stereotypes of the colonized (Rivera Ramos, 1998). Antonio S. Pedreira (1985), for example, on his famous essay *Insularismo*, similarly to the colonizer blamed psychological and emotional conditions of Puerto Ricans on geographical location and size, lack of natural resources, as well as on biological conditions. He presented a polarized description of Puerto Ricans, being hospitable, warm, and generous; as well as distrustful, cunning and festive.

Research shows Puerto Ricans having a general negative self-image, even though it is better than their collective self-esteem (Rivera Ramos, 1998). Puerto Rican youth perceives themselves as clever and hard workers, and, while laziness showed a negative connotation to them, dependency did not (Varas Díaz & Serrano Garcia, 2003).

2.2.7.2 Collective Self-esteem

Several researches report Puerto Ricans having a general negative collective self-esteem, even worse than their self-image (Albizu Miranda & Marty Torres, 1958, 1967; Nieves Falcón, 1972; Rivera Ramos, 1984, 1998; Varas Díaz & Serrano García, 2003). For example, Psychologist Alba N. Rivera Ramos (1998) conducted a series of exploratory studies in different areas of Puerto Rico, during the years 1978-1989 using both quantitative and qualitative methodology. The overall research objectives

were the internalization of Memmi's portrait of the colonized, and the impact in the personal and collective self-acceptance of Puerto Ricans through decision-making (Memmi, 2001; Rivera Ramos, 1998).

The sample consisted of 1,767 subjects, of both genders, coming from diverse residential zones— rural, urban and metropolitan area—, and having diverse level of income. "Invariably, within all the researches realized, it was found that the personal perception and self-value was always higher and more positive than the collective one" (Rivera Ramos, 1998, p.59).

When comparing attributions among Puerto Rican and American personality, the positive attributions to Puerto Ricans have to do with socio-affective factors —friendly, happy, smiley, cooperative, hospitable, and strongly family oriented—. Meanwhile, the positive attributions to Americans have to do with instrumental factors —intelligent, pragmatic, business oriented, and cold regarding interpersonal relationships— (Rivera Ramos, 1998).

Likewise, when the subjects of the studies compared themselves with foreigners, they said that overall they considered foreigners better than Puerto Ricans, also more cultured and educated. Similarly, subjects of the study considered Americans better and more intelligent than Puerto Ricans. Dominicans are considered equal to Puerto Ricans, while Cubans in exile and residing in Puerto Rico are better and harder workers (Rivera Ramos, 1998).

When presented to the statement "Puerto Ricans are…" all subjects showed negative self-acceptance. Eighty percent agreed that Puerto Ricans are lazy, followed by submissive, docile, cornered or trapped, oppressed, inferior, incapable, subjugated, dependent, impotent, and cowards. The positive attribution mainly chose was

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hospitable —which is a constant adjective used for Puerto Ricans on the history or social studies textbooks in the school system—, followed by helpful or attentive (Rivera Ramos, 1998).

A similar research regarding personal and collective identity and self-value of Puerto Rican children was performed with 819 children, with at least one of their parents (78 percent mothers), and 79 teachers (mostly females). The sample was selected from rural and urban area. The results were similar to the result of the research done with adults. Individual self-value was higher than the collective one. Parents evaluated their kids positively, but evaluated the collective Puerto Rican children negatively. Teachers showed a tendency towards negative valorization of the Puerto Rican children (Rivera Ramos, 1998).

The researcher concluded that the parents' and teachers' valorization of children has a great impact on the psychological configuration of self-value, confirming the thesis that the stereotypes of the colonizers are internalized by teachers and children as well. In addition, she concluded that those reproduced and perpetuated stereotypes of the school system create "the self-realizing prophecy" of the inferior Puerto Rican, to the point that kids consider themselves lazy (Rivera Ramos, 1998).

Fanon (1986) and Memmi (2001) affirmed that a fundamental part of colonialism is the devaluation of the history and culture of the colonized people, which leads them to develop a negative perception and representation of themselves. The colonizers save all positive attributes for themselves and attempt that the colonized internalize it in that way. Two of the major characteristics attributed by the colonizers to the colonized are laziness and idleness; which has been a discourse used in Puerto Rico for over a century, and an attribution generally internalized by Puerto

Ricans (Rivera Ramos, 1984, 1985; Rivera Ramos & Acevedo, 1985; Varas Díaz &
Serrano García, 2003).

A pioneer empirical research on the psychological characteristics of Puerto
Ricans was conducted in 1958 (Albizu Miranda & Marty Torres, 1958). The study
sample consisted of low class Puerto Ricans, living in Puerto Rico. A similar sample
was collected in a residential sector of Chicago, Illinois. The results of the study
showed feelings of distrust, frustration, inferiority, resignation, docility and passivity,
attributions that are not too different from the Rivera Ramos studies, but similar to the
determinant factors for personality development theory (Albizu Miranda & Marty
Torres, 1958; Lazarus, 1971; Rivera Ramos, 1998; Tajfel, 1978).

2.2.8 Puerto Rican Psychosocial Profile

The construction of the colonized psyche is influenced by the colonized
experiences of oppression, exclusion, and inequality; mainly manifested in their
socio-demographic profile. The colonized psyche is a factor that contributes to
multiple symptoms of mental illness, ranging from schizophrenia, depression,
neurosis and anxiety, to alcoholism, drug abuse, violence, suicide, and homicide
(Rivera Ramos, 1998). Rivera Ramos (1998) claims that, "those mental illnesses
occur because people cannot be mentally healthy if they practice self-rejection, a
rejection of their own essence, in other word, their identity" (p.153).

Ross (2004) concurs with Rivera Ramos' (1998) conclusion when she affirms
that it is vital to examine the social conditions and traumas of the communities in the
context of the effect of the injustices of colonialism. The combination of chronic
stress, historical trauma, and oppression drive people to develop physical and
psychological conditions, including high rates of substance abuse and depression. On

the other hand, Malgady et al. (1990) conclude that high-risk population models in terms of increased stress and higher prevalence of mental health symptoms coincide alarmingly with the socio-demographic characteristics of the Puerto Rican population.

As previously indicated, Puerto Ricans are markedly below the US median income, have a high rate of unemployment and poverty level (Central Intelligence Agency, 2010; Moody's Investors Service, 2011; U.S. Census Bureau, 2006). Additionally, Puerto Rico has one of the highest population densities in the world, 1,110 persons per square mile, which has been identified among the stress factors affecting mental health. Furthermore, data regarding mental health in Puerto Rico confirms that mental health is one of the main health problems in Puerto Rico, and the chief health problem for the youth. Ninety percent of suicides in Puerto Rico had a psychiatric diagnosis, depression being the most common determinant factor. Drug abuse and dependency is considered one of the current more important issues for public policy, however, very limited services are currently available (Tendenciaspr, 2001; Rivera Ramos, 1984).

Drug trafficking and social deterioration, both strongly related to economic hardships, have been identified as major factors for the wave of violent crime. Homicide was the first cause of death among youth 15-30 years old in Puerto Rico in 2001; alongside, suicide which was the third violent death cause among men 15-34 years old (U.S. Department of Justice, 2011;Tendenciaspr, 2001). Contrary to U.S. trends, violent crime increased overall in Puerto Rico by 17 percent from 2007 to 2009. In 2009 homicide was the cause of death of 894 Puerto Ricans, 63 percent of them were men between 20 and 34 years of age (U.S. Department of Justice, 2011; Tendenciaspr, 2010). In 2010, Puerto Rico saw the second highest number of murders

in its history, a trend that is escalating in 2011. By March 31, 2011statistics showed 301 homicides; the tendency is that it will surpass previous violent deaths statistics. On the other hand, the clearing up rate for murders remains below the national average U.S. Department of Justice, 2011

2.3 Implications for the Social Work Profession

The implications of the U.S. colonialism in Puerto Rico to the social work profession are many, ranging from the macro to the micro level. Issues of oppression, human rights, social justice, social and economic development, self-determination, conscientization, empowerment, as well as individual self-concept and collective self-esteem, are all related to colonialism.

Similarly, all of them are also important elements of the social work profession principles and values. Most of them are endorsed by the national and international social work regulating organisms: the Council on Social Work Education (CSWE), National Association of Social Workers (NASW), International Association of Schools of Social Work (IASSW), International Federation of Social Workers (IASSW), *Colegio de Trabajadores Sociales de Puerto Rico* (*CTSPR*) [Professional Association of Social Workers of Puerto Rico], and the *Asociación Latinoamericana de Enseñanza e Investigación en Trabajo Social (ALAEITS)* [Latin-American Association on Social Work Education and Investigation].

The Council on Social Work Education established in their Educational Policy and Accreditation Standards preamble that social work practice promotes human well-being by strengthening capacities of people, correcting conditions that limit human rights and quality of life, working to eliminate poverty, discrimination and oppression, and promoting social and economic justice worldwide. Thus, social workers reflect

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their identification with the profession through their teaching, scholarship, and service (Council on Social Work Education-CSWE, 2004).

The mission of the social work profession as established by the NASW Code of Ethics is to enhance human well-being, with particular attention to the needs and empowerment of people who are vulnerable, oppressed, and living in poverty. It recognizes service, social justice, dignity and worth of the person, importance of human relationships, integrity, and competence as the profession's values (NASW, 1999).

Likewise, the International Association of Schools of Social Work (IASSW) and the International Federation of Social Workers (IFSW) jointly adopted in Copenhagen in June 27, 2001 an international definition of social work that embraced the promotion of social change, problem solving in human relationships, and the empowerment and liberation of people. It is committed to the enhancement of people's well-being, intervenes at the points where people interact with their environments, and establishes that the principles of human rights and social justice are fundamental to social work (IASSW, 2001).

The *Colegio de Trabajadores Sociales de Puerto Rico* (*CTSPR*) has just release a new Code of Ethics that came into effect on July 1, 2011; the previous one was in use since 1982. Among many other things, the past Code of Ethics established that social workers have the individual and collective responsibility of making possible for everybody the principle of social justice, which is the main purpose of the profession of social work. They [social workers] should be aware of current social problems to raise their voices regarding those issues that affect the individual and collective lives of the people of the country [Puerto Rico] (CTSPR, 1982).

The New Code of Ethics of the CTSPR (2011) establishes that the practice of social work should promote, among others, human rights and social justice. It establishes a commitment to work towards the eradication of poverty, oppression and all kind of discrimination. Social workers should be aware of the social, cultural, political and economic contexts affecting the country and the people they serve. In addition, social workers should be active in social policy development, analysis and recommendations. They should encourage participants to be active in social policy evaluation and recommendations.

Despite the ample literature regarding the effect of colonialism, the psychosocial trends discussed so far are rarely analyzed from a systemic, critical and colonial perspective. Most psychosocial assessments are conducted from a traditional clinical perspective, which regularly focus on the individual or the family's deficiencies, but fail to assess the interference of the macro system. Such evaluations have the tendency of blaming the victim, trapping the individual in a double discrimination. As the Australian Professor Emeritus Jim Ife stated in regards to international social work, lack of debate or analysis about the dangers of colonialism will only perpetuate such colonialism (Ife, 2007).

Regardless of the colonialism arguments reviewed, the study of the effects of colonialism in the psychosocial process of the colonized has not yet been strongly inserted in the social work profession; Puerto Rico included (Gil, 1998; Ife, 2007, Seda, 2006, 2009, 2010). Few exceptions can be mentioned which includes the University of Connecticut's M.S.W program. This program might be one of the few which offered a course on Human Oppression and the Puerto Rican Experience. However, this course was lately merged with the African American Experience.

Although it highlights the Puerto Rican experience, it now focuses on the Latino populations in the United States (UCSSW, 2010-11). Another exception was Hong Kong, where a course on the history of social work and social welfare in the colony was offered (Midgley, 1981). The undergraduate and graduate social work programs of the University of Puerto Rico are also including the colonialism topic in their curricula. Although not from the social work perspective, the Sociology Department offers one specific course on Colonialism in Puerto Rico. The *Instituto de Política Social (IPS)* [Social Policy Institute] assigned to Social Work Doctoral Program of the University of Puerto Rico is also working toward conscientization of oppressive forces and developing strategies of action. While not directly focusing on colonialism, the institute has the intent to develop social policy analysts and administrators with a strong knowledge of the contemporary Puerto Rican social debates and commitment with the social transformation of the country.

The CTSPR is another social work institution that has recently included the Puerto Rican colonial agenda in their work. In response to a petition received in their 2005 annual assembly, the CTSPR established a Commission for the Study of the Political Status of Puerto Rico and its impact on Social Policy and the Social Work profession. The commission was established in 2006; ever since it has been tremendously important in developing forums, discussions, workshops, and education regarding the Puerto Rican colonial status and its implication to the social work professionals. The Annual Assembly topic of year 2009 was the Puerto Rican Political Status and Social Policy. In the 2010 Assembly, the commission held a discussion round table on the relation between structural violence, colonialism and social work. All this discussions, in conjunction with efforts made by other

commissions including the Commission on Diversity and Human Rights pursue the development of a professional ethical-political project for the defense of the profession's ethical values, human rights, and civil society's active participation (Barreto Cortez & López Ortiz, 2011).

Considering the literature reviewed, it is assumed that social work students or professionals, particularly Puerto Ricans, unless developing psycho-socio-political awareness (*conscientization*), will have an internalized colonial mentality. This mentality will affect their practice, either by the perpetuation of colonialism or by overlooking such factors in their assessments. In fact, this concurs with some results of a comparative study about social work in the Antillean Region of the Hispanic Caribbean: Cuba, Dominican Republic, and Puerto Rico. In a random sample selected of one hundred Puerto Rican social workers, 68 percent considered that the main objective of the social work profession is the person's adaptation to other individuals and the social environment; and the majority consider their practice to be of assistance as opposed to that of liberation (Guardiola Ortiz, 2006). By assuming this posture, social workers turn into agents of control, maintainers of the establishment or status quo, and oppressors instead of being the agents of change that they are supposed to be (Gil, 1998, Seda, 2009, 2010).

As Freire (1990) stated, the oppressed that is unaware of his or her oppression, instead of striving for liberation tend to become an oppressor him or herself. In their confusion, the oppressed believe that the way of getting out of their reality is to look more like the oppressor, and therefore rejects or oppress his or her peers.

2.3.1 Social Work Imperialism in Puerto Rico

The origins of the social work profession in Puerto Rico date from the 1920´s decade. By then, few people, most of them women, were working in the American Red Cross, the Department of Public Health, and the Department of Public Instruction (Guardiola Ortiz & Serra Taylor, 2001). Social Work education started in the late 20´s with some training in social work given to student teachers. These teachers where classified as teachers in social welfare or visiting teachers. In 1930, under the sponsorship of the Department of Public Education, twenty-eight women were selected by Dorothy D. Bourne to pursue summer training in social work at the University of Puerto Rico. This consisted of a three-year summer program that was equivalent of one year training in social work. This program would introduce social work principles and techniques, examine major existing health problems, and existing social and economic conditions. A year later, in 1934 a certificate in social work was offered in a Graduate School of Social Work but in the Faculty of Education. In 1954, the program was transferred to the Faculty of Social Sciences (Burgos Ortiz, 1998; Guardiola Ortiz & Serra Taylor, 2001; Rivera de Ríos, 1986).

Bourne was a social worker who had come from the US with her husband, James R. Bourne. He was appointed director of the Federal Emergency Relief Administration of Puerto Rico, while she supervised the teachers in social welfare in the school system (Burgos Ortiz, 1998). Along with Mrs. Bourne, other American social workers occupied directive positions in major public departments such as health, education and family. Besides, the pioneers were trained to implement the welfare programs and social policies introduced in Puerto Rico with the New Deal, developed by US President Franklin D. Roosevelt. Social work education is largely

based on textbooks exported from an unrelated context, hardly applicable to Puerto Rican reality and needs.

The introduction of the US methods, specifically casework, was the first clash with the flourishing indigenous community social work method, stated Seda (2009). Actually, in her study, Guardiola (2006) found that social workers tend to assume technocratic and exported social work approaches. This is a reality particularly relevant to the estimation that colonialism or professional imperialism is transferred to other cultures in a form of foreign models of social work (Gray, 2005; Midgley, 1981; Midgley & Tang, 2001). It supports the beliefs that the western ideas and practices are superior and worthy of emulation (Midgley, 1981).

2.4 Relevance of the Study

This researcher anticipates contributing to the development of empirical research that will increase awareness on the psychosocial issues that are current and pertinent for the people of Puerto Rico, and the social work profession (United Nations Organization, 2011; Córdova Campos, 2010, Seda, 2006, 2009, 2010). Furthermore, Puerto Rico has rarely been included in the colonial debate in relation to social work education and practice, therefore, its inclusion, by itself, is a definite contribution of this study (Burgos Ortiz, 1998; Córdova Campos, 2010; Elliott et. al., 1990; Guardiola Ortiz & Serra Taylor, 2001; Midgley, 1981; Queiro-Tajalli, 1997; Rivera de Ríos, 1986; Watts et. al., 1995).

The construction and validation of the Colonialism Scale for Puerto Ricans could provide a tool to perform further research such as a correlation of internalized colonialism, and individual and collective self-esteem. It could also be used for psychosocial assessment in social work practice. Likewise, evidence of the study

might provoke the inclusion of the colonial issue as an important component in Puerto Rican social work curriculum, practice, social policy planning and evaluation, or even support theory.

2.5 Summary

The literature review presented is not, by any mean, a thorough one. Surely many other elements and profound analysis can be added. It instead presents a foundation for an initial understanding of an issue that is extensive and complex. The data support the arguments of the violence exerted on a country and its people for over one hundred years, and some of its consequences. U.S. colonialism, although in general terms is not executed in a blatant physical form, as it was done by the Spanish colonial rule or in other countries in Latin America, Africa or Asia, has indeed at times included murder. It has been a coercive and symbolic way of oppression that reinforces hegemony, shown in a form of repression, exploitation of natural and economic resources, impositions of laws, decrees, and foreign culture. Colonialism has influence in generating a social, emotional and psychological imbalance known as internalized colonialism or the colonial mentality, where the person's perception of self or the collective is diminished or self-despicable.

Social work profession and education are not secluded from this reality, nor are social workers. The colonial issue has also influence them from diverse perspectives, hence, its relevance to social work.

The literature review provoked the following research questions:

1. What is the level of awareness about colonialism among Puerto Ricans?

2. What is the level of internalized colonialism among Puerto Ricans?

The research methodology design presented in next chapter attempts to address these questions as well as the hypotheses that came out of the questions.

CHAPTER 3

METHODOLOGY

The methodological design for this study is presented in this chapter. The chapter includes the type of research design selected, variables and hypotheses, sampling design, validity and reliability testing strategies, data collection strategies, and data analysis plan. Procedures for obtaining The University of Texas at Arlington's Institutional Review Board (IRB) approval of compliance are also included in this chapter. As previously mentioned the goal of this research was the construction and testing for validation of the Colonialism Scale for Puerto Ricans (CSPR).

3.1 Design

In the quest for an answer to the research questions, this study was designed utilizing a quantitative research method. The ultimate goal of the research was the construction and testing for validation of a self-report attitude scale designed to measure Puerto Rican's internalized colonialism. The scale was designed following a Likert's summated rating method (Aiken, 1996; Likert, 1932).

Measurement is the process of linking abstract concepts with empirical indicators. It could be done through an organized and explicit plan to classify or quantify available data in terms of the concept that the investigator has in mind (Aiken, 1996; Hernández Sampieri et al., 2003; Carmines & Zeller, 1979; Nunnally, 1978). Self-report attitude scales, especially Likert's type, are by far the most widely used approach when measuring feelings about particular social objects. Although susceptible to some weaknesses, self-report attitude scales are the most valid approach currently available (Aiken, 1996; Nunnally, 1978).

The Colonialism Scale for Puerto Ricans (CSPR) is the instrument developed

by this investigator on her attempt to measure the concept of internalized colonialism.

This scale rests on the premise that attitudes are made up of cognitive, affective and

behavioral rudiments. The cognitive component includes all beliefs and expectations

regarding an issue, based on the knowledge people have about it, while the affective

component has to do with the emotional responses associated with the cognitive

category. The behavioral component, on the other hand, is the conduct or action that

the person might show in the presence of some stimuli (Aiken, 1996; Krech et. al.,

1962). As with beliefs, emotions and behavior, in many instances, go through

different discursive paths; so, the items in the CSPR includes, cognitive, affective, and

behavioral assertions (Aiken, 1996; DeVellis, 1991; Edwards, 1957; Spector, 1992).

Actually, a weakness when measuring attitudes is that scales rest on what individuals

know about their attitudes and are willing to relate. Another limitation is social

desirability or people's motivation to present themselves in a way that society regards

as positive (DeVellis, 1991; Nunnally, 1978). In fact, colonial unawareness is

presented in the literature review as a very important aspect of internalized

colonialism, suggesting that internalized colonialism is an unconscious process for the

colonized (Fanon, 1967, 1986; Freire, 1990; Memmi, 2001). As Cannella, & Viruru

(2004) says, "Individuals, families, and communities struggling to survive, work, and

be educated barely have time to consider notions of colonialism or Empire" (p.11)

3.1.1 Constructs and Variables

Variables in a psychometric theory's vocabulary are referred to as constructs.

The rationale behind that difference with other studies is that, as stated by Nunnally

(1978), "it, (i.e. a construct), is something that scientists put together from their own

imaginations, something that does not exist as an isolated, observable dimension of behavior (p.96). Likewise, in Factor Analysis, there is no independent and dependent constructs, but rather a set of items (at times referred to as variables) about a group of people (DiLeonardi, & Curtis, 1988). Yet, this researcher is referring to the construct the scale is attempting to measure as the Latent Construct, and to the factors as the Hypothetical constructs. However, the demographics remain as variables.

3.1.1.1 Latent Construct

Internalized Colonialism (IC) –It is the subconscious assimilation of oppression, characterized by a perception of personal, ethnic or cultural inferiority that is believed to be a specific consequence of living under colonialism (David & Okasaki, 2006). For the purpose of this study, IC consists of the over a century of experience of US colonial rule in Puerto Rico. Previous Spanish colonialism is not included. This variable was measured using the total score on the *Colonialism Scale for Puerto Ricans* (*CSPR*).

3.1.1.2 Hypothetical Constructs

Colonial Awareness (CA) – Consists of the knowledge about colonialism in general, and U.S. colonialism in Puerto Rico in specific. This factor assesses people's awareness of colonial facts, and their interest in, and access to the discussion of colonial issues. People with deeper internalized colonialism are usually less aware of colonial facts, have more misconceptions or no interest on the discussion of the topic (David, & Okasaki, 2006; Fanon, 1986; Freire; 1990; Memmi; 2001).

1. Ethnic or cultural self-image (ECSI) – It is described as a discursive or behavioral perception of inferiority. It is shown through a general undervaluing of anything indigenous, and an automatic and uncritical

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overvaluing of anything coming from the colonizer. People either try very hard to look like the colonizer by changing their physical features, or adopting their traditions, cultural values, and lifestyles. It involves an automatic and uncritical acceptance and perpetuation of ideas, values and sociopolitical conditions passed on through generations verbally or in writing (David & Okasaki, 2006; Fanon, 1986; Freire; 1990; **M**emmi; 2001).

2. Idea of collective wellbeing (ICWB) – It is conceived as an internalization of the hegemonic discourse, consisting of a misleading awareness promoted by the structures of dominance, which is regularly ingeniously implemented by education, mass media and telecommunications (Agger, 1998; Cannella, & Viruru, 2004; Gramsci, 1975; Kreuger and Neuman, 2006; Prasad, 2005. The colonized do not realize their oppression, and falsely believe that their interests are served by the continuance of the status quo, since the idea is of wellness, there is no need for emancipation or social change; individualism takes over collectivism (Agger, 1998; Dyson & Brown, 2006).

3. Colonial debt (CD) – It is the perception of the colonizer as kind, well-intentioned, civilizing, liberating, or noble heroes (David, & Okasaki, 2006; Freire, 1990; Memmi, 2001). It is a discursive and behavioral normalization of maltreatment. Violence and exploitation is generally justified as "the price to pay to become as similar to the colonizer as possible" (David, & Okasaki, 2006, p. 242). Persons who feel indebted to the colonizer may believe that their counterparts must be positively viewed by the dominant group (David & Okasaki, 2006; Memmi, 2001).

3.1.1.3 Demographic Variables

Demographic variables are included in the data collection for control and further statistical analysis; the variables were selected based on a comprehensive literature review Religion has been identified in the literature review as an important factor for internalization and perpetuation of colonialism in Puerto Rico, so religion of preference was explored. Education has been highlighted as one of the most important factors for internalized colonialism. Therefore, the type of school attended from K to 12 grade (private or Public), type of college attending (private or public), location of school attended from K-12 (rural, urban, metropolitan area or US), and location of college attended (rural, urban, metropolitan or US) were collected and analyzed. Information about other types of non-formal education or exposure, such as cultural, political, popular education and other groups' participation was collected, as well as political party of preference, as they might have a relationship with the latent construct. Empirical studies show that people from the Metropolitan Area tended to be more satisfied with U.S. cultural intervention compared to those from rural areas (Hispania Research Corporation, 1993; Rivera Ramos, 1998). Hence, town of origin, as well as circular migration within U.S. and Puerto Rico were explored. People at the extremes of the socio-economic structure have been recognized in the literature review as having been more identified with the colonizer, so these factors were explored as well (David and Okasaki, 2006; Hispania Research Corporation, 1993; Rivera Ramos, 1998). Although no relationship has ever been reported, occupation and type of place of work was explored also. These demographic variables were analyzed in relation to the latent construct. Appendix B shows the demographic survey.

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3.1.2 General Hypothesis

Overall, Puerto Ricans have high levels of internalized colonialism.

3.1.2.1 Hypotheses

H_1 – Adult Puerto Ricans with overall high levels of internalized colonialism will score low on the Colonial Awareness factor.

H_2 – Adult Puerto Ricans with overall high levels of internalized colonialism will score low on the Ethnic and Cultural Self Image factor.

H_3 – Adult Puerto Ricans with overall high levels of internalized colonialism will score low on the factor Idea of Collective Wellbeing.

H_4- Adult Puerto Ricans with overall high levels of internalized colonialism will score low on the Colonial Debt factor.

3.1.3 Sampling design

An appropriate sample selection and sample size are essential to enhance statistical power in a study. The characteristics of the selected sample and the appropriateness of sample size will determine how far results can be generalized to the population out of the study sample.

3.1.3.1 Sampling

Although random selection is the most accurate form of sampling, it is not always possible or feasible, in which case a non-probabilistic sampling technique is suggested (DiLeonardi & Curtis, 1988; Hernández Sampieri, 2003; Rubin & Babbie, 2005).The sampling method selected for this research was a non-probability convenience sample, supported by a judgmental and purposive selection to reflect the real population. Rubin, & Babbie (2008) state that the judgmental and purposive selection technique "is especially appropriate in the initial design of a questionnaire,

when [the researcher] wishes to select the widest variety of respondents to test the broad applicability of questions" (p. 342). In other words, the researcher would make an effort to ensure that the sample reflects the personal characteristics, demographics, and attitudes of the general population.

3.1.3.2 Sample Size

The sample size recommended for initial scale development "is less straightforward than determining the sample size needed to detect a particular effect, given the level of significance and desired power for the statistical analysis (Johansen, & Brooks, 2010, p. 396). The sample size for initial scale development is influenced by many factors that go beyond the amount of subjects in the sample. A full representation of the target population and the cultural relatedness among items and subject is as important as sample size (Child, 1990; DeVellis, 1991; Johansen, & Brooks, 2010; Spector, 1992). Sample size recommendations for initial scale development and validation vary widely, since some researchers suggest a subject/variables (items) ratio of 1:1, others advise as much as 10 to 15 subjects per variable (items). Edwards (1957) believed that two or three subjects per item in the original version of the scale were sufficient. Nunnally (1978) proposes a specific sample of 300 subjects regardless the amount of items. However, Child (1990) states that "practical experience suggests that scales have been successfully developed with smaller samples."(p.78). Spector (1992), as well as Crocker & Algina (1986), suggests 100 to 200 subjects for full administration regardless the amount of items. Kline (1994), on the other hand, suggests a minimum of 100 subjects, but a subject/variables (items) ratio of 2:1.

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The sample size selected for this research follows Edwards' (1957)

recommendation of 2 to 3 subjects per item in the original scale. The selection was

made based on a middle ground among the sample size recommendations for strong

statistical power, and considering feasibility of efforts and resources available for data

collection and analysis. The original version of the scale was 90 items, 300 scales

were distributed, 254 were returned, with a final N=249 after data cleaning. Thus,

sample size complies with Child (1990); Crocker & Algina (1986), Edwards (1957),

Kline (1994), and Spector's (1992) recommendation for a robust sample size in scale

development and validation. The sample is composed of Puerto Rican males and

females, ranging from 18 to 72 years of age, from rural, urban and metropolitan area,

and other demographic characteristics that will be presented further in the findings

chapter.

3.1.4 Validity and Reliability Testing Strategies

Validity and Reliability are vital issues in measurement; both matters are

important for the credibility of the findings (Aiken, 1997; Cronbach, 1966; DeVellis,

1991; Hernández Sampieri, et al., 2003; Kreuger, & Neuman, 2006; Spector, 1992). It

is almost impossible to represent abstract concepts in a measuring instrument with

complete fidelity. However, it is imperative that the instrument used would attain the

closest representation of such concept with a minimum of measurement errors

(Hernández Sampieri, et al., 2003; Rubin & Babbie, 2005; Weinbach & Grinnell,

2003).

3.1.4.1 Validity

Two forms of validity *were* performed in this research, one consisting of a face

validity of the preliminary scale, and the other construct validity, specifically

discriminant validity between the items and the constructs of the CSPR after scale's full administration. Results of validity for the CSPR will be presented in the findings chapter.

3.1.4.2 Reliability

The tendency towards consistency found in repeated measurements of the same phenomena is known as reliability. Although error free measurement is never achieved in any study, efforts should be made to minimize errors (Aiken, 1997; Carmines, & Zeller, 1979; Cronbach, 1966; Hernández Sampieri, et al., 2003; Kreuger, & Neuman, 2006; Rubin, & Babbie, 2005, 2008). Internal-consistency reliability is very important in scale construction and testing. Achieving it means that the multiple items designed to measure the same construct, intercorrelate with one another. One way to increase reliability is to increase the number of items, which is the theory behind the summated rating scale (Spector, 1992).

Cronbach's alpha is undoubtedly the most popular reliability test available, asserts Carmines & Zeller (1979). Therefore, the selected method to test reliability of the CSPR is the measurement of internal consistency, using the Cronbach's alpha coefficient test. Coefficient alpha should be at least .70 for a scale to demonstrate internal consistency (Nunnally, 1978). Reliability results for the CSPR will be presented on the findings chapter.

3.1.5 Data Collection Strategies

Data collection consisted of the distribution of the self-report instrument, the demographic survey, and the discussion and signing of the informed consent form. Subjects kept a copy of the latter. Details of data collection will be presented in next chapter, since it relates to the fourth step of scale construction process.

3.1.6 Data Analysis Plan

A codebook was developed consisting of variable names, values, and labels. The researcher created a data set by entering the collected data to the IBM Statistical Package for Social Sciences 19 (SPSS-19). SPSS-19 was used to generate descriptive and inferential statistic analysis, including Exploratory Factor Analysis, and total score analysis.

A scoring sheet was developed for the CSPR. It consists of factors, weight values for the items, and identification of positively and negatively worded items. A complete description and results of data analysis will be presented on the next chapter.

3.2 Institutional Review Board Protocol

The University of Texas at Arlington provides a regulatory protocol through the Institutional Review Board (IRB) to promote and assure ethical conduct with human subjects by their researchers. The IRB requires a workshop and examination for the researchers in addition to a UTA-IRB protocol with the inclusion of pertinent documentation. All requirements for this research were submitted and approved by IRB on March 2011; the approval is active until March, 2012.

Compliance with IRB's regulations and confidentiality requirements includes the provision of an informed consent process for every participant. The informed consent was unattached from the participants completed instruments to protect confidentiality. Appendix C shows the Spanish Informed Consent, and Appendix D presents the English translation. Hard data for this study will be kept in a locked file, and two copies of the data will be kept in a computer system with a security code.

CHAPTER 4

RESEARCH FINDINGS

The research findings are presented in this chapter. They are divided in four parts: 1) Demographics 2) The Colonialism Scale for Puerto Rican´s (CSPR) construction, testing, and validation process 3) Results of the scale validation process, and 4) Summary of findings.

4.1 Demographics

Out of the 249 participants in this study, 66.7% (n = 166) were female, and 32.5% (n = 81) male. The age distribution array was 62, ranging from 18 to 80 years of age. Mean age was 39.56% (SD = 16.55). This sample represented highly educated people, 58.2% had some sort of college education, 22.1% had a master's degree or were enrolled in a master's program, 6% had a doctoral degree or were enrolled in a doctoral program, and 11.2 were high school students. Only one person had not gone further than elementary school, and two only attended up to Jr. High. In terms of occupation, there were three major groups represented in the sample. Students had the higher representation with 30.9%; follow by the Managerial, Executive, Professional, and Technical category, which represented 28.9% of the sample, and lastly the Manual, Service (skilled/non-skilled) group with 13.3% representation.

In contrast to the high level of education, the socioeconomic level of the sample was low. Over half of the sample, 62.4%, reported an annual family income of $39,999 or less. The income for 25.6% of the previously mentioned group was less than $20,000 annually. Only 5.6% reported an income of $80,000 or above. See Table 4.1.

Table 4.1 General Demographics: Descriptive Statistics

Variable	n	Frequencies	Percentage
Gender	247		
Female		166	66.7
Male		81	32.5
Age	243		
> 20 years old		31	12.4
21 – 30		56	22.5
31 – 40		33	13.3
41 – 50		48	19.3
51 – 60		39	15.7
< 60		36	14.5
Education	248		
Elementary		1	.4
Jr. High		3	1.2
High School		28	11.2
College		145	58.2
Masters		55	22.1
Doctorate		15	6.0
Post-Doc		1	.4
Occupation	238		
Managerial, Executive, Professional,		72	30.3
Clerical		15	6.3
Manual, Service (Skilled/Non Skilled)		33	13.9
Employed at home		14	5.9
Armed Forces		1	4
Students		77	32.4
Retired		23	9.7
Disabled		2	.8
Other		1	.4
Income	234		
Below – $20,000		60	25.6
20,000 – 39,999		86	36.8
40,000 – 59,999		43	18.4
60,000 – 79,999		32	13.7
80,000 – 99,999		6	2.6
100,000 or more		7	3.0
Country of Birth	243		
Puerto Rico		230	94.7
United States		12	4.9
Other		1	.4

Regarding place of birth, the majority of the people were born in Puerto Rico, 92.4%, while the rest were born in USA, 4.8%, and one person was born in Mexico. The travel and migration pattern in the data shows the interaction of Puerto Ricans with the United States. Although a very high percentage of the subjects in the sample were born in Puerto Rico a very high percentage, 93.2% has been also in the US at least once. Those who went to the United States only one time visiting accounted for 7.8%, however, almost half, 47.8%, have been in United States a few times visiting. The rest, 44.4% lived in the United States somewhere around less than a year and up to more than eleven years. On the other hand, when asked to what countries outside of Puerto Rico or the United States they have travelled, 17.9% said none, 26.9% had travelled to one country out of Puerto Rico or USA, 17% had travelled to two. The distribution of countries travelled to for rest of the subjects in the sample was between three to ten countries. A good number of people who mentioned having traveled to three or more countries did so by taking a Caribbean Cruise or as a member of the United States Army. The country most travelled to was the Dominican Republic, 54%, followed by 14.8 who visited the Caribbean (not D.R.), and 16.5% visiting Central or Latin America (not the Caribbean). Nevertheless, 28.9% had never traveled to any country other than US.

In terms of religion, the distribution was balanced among Catholics and Protestants. The Catholics were represented with 34.7% Traditional Catholics plus 6.5 Catholics Liberation Theology, while Protestants were 35.9% of the sample. Eighteen percent did not have any religion of preference.

Regarding political ideology, the majority, 51.2%, claimed they did not have any political party of preference, followed by those who identify with the PPD (pro

Commonwealth party) 22.1%, those who identify with the PIP (pro Independence Party) accounted for 11.7%, and 9.2% with the PNP (pro Statehood party). The rest favored the PPP (which does not identify with any political status) 1.3%, and 4.9 with other, which could be the Nationalist Party or a new movement which is in the process of getting inscribed as a party, MUS (Sovereigns Movement). See Table 4.2.

Table 4.2 Demographic Frequencies of Travel, Migration and Ideology

Variable	n	Frequencies	Percentage
Travel To Us	244		
Yes		232	93.2
No		12	4.5
Length of Time In US	232		
Once visiting		18	7.8
Several times visiting		111	47.8
Lived less than one year		26	11.2
Lived 1 to 5 years		42	18.1
Lived 6 to 10 years		14	6.0
Lived more than 11 years		21	9.1
Travel out of PR And US	247		
Dominican Republic		95	38.5
Caribbean (not D.R.)		26	10.5
Central or L.A. (not Caribbean)		29	11.7
Canada		7	2.8
Africa		1	.4
Asia		1	.4
Europe		16	6.5
None		72	29.1
Religion	245		
None		44	18.0
Catholic Traditional		85	34.7
Catholic Liberation Theology		16	6.5
Protestant		88	35.9
Other		12	4.9
Political Party Of Preference	240		
None		123	51.2
PIP		28	11.7
PNP		22	9.2
PPD		53	22.1
PPP		3	1.3
Other		11	4.6

4.2 Construction, Testing, and Validation Process of the CSPR

The construction of summated rating scales is a multistep process. Likewise, validity of newly developed scales is a cumulative ongoing process that requires several separate studies (Child, 1990; DeVellis, 1991; Edwards, 1957; Spector, 1992). "It may take several attempts at scale development until the construct is well enough developed to be useful" (Spector, 1992, p. 16).The Colonialism Scale for Puerto Ricans (CSPR) is the first instrument designed for Puerto Ricans on the issue of internalized colonialism. The Colonial Mentality Scale (CMS) for Filipino Americans developed by David & Okasaki (2006) served as conceptual model scale; however, the CSPR construction follows Spector's Summated Rating Scale Steps (Spector, 1992). Spector's model consists of the following five basic steps: 1) Construct definition, 2) Scale design 3) Pilot testing 4) Full data collection 5) Statistical analysis for scale testing and validation. Figure 4.1 shows Spector's scale developing model.
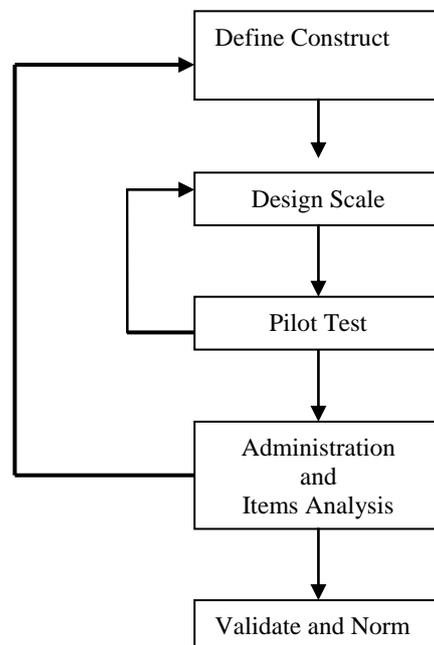
Figure 4.1 Spector's Steps to Developing a Summated Rating Scale

4.2.1 First Step: Construct Definition

Construct definition consists of clearly and precisely defining the construct to be measured, in other words, clearly establishing what the scale is intended to measure. This step is considered a vital one in scale construction and validation; it is the foundation of scale development (DeVellis, 1991; Edwards, 1957; Spector, 1992). The construction and definition of a preliminary set of factors or hypothetical constructs is also part of the construct definition step. A comprehensive theoretical and empirical literature review was the first step taken for the development of the conceptualization and definition of the latent construct named Internalized Colonialism, and of the hypothetical constructs or factors.

4.2.1.1 Hypothetical Constructs or Factors

The set of factors, which were believed to form the minimum aspect of the latent construct, were extrapolated from the theoretical and empirical literature review. They are underlying, hypothetical and unobservable factors. At this stage of the construction of the scale factors are non-mathematical assumptions that are the best representation of the construct to be measured i.e. Internalized Colonialism (DiLeonardi, & Curtis, 1988; Mertler, & Vannatta, 2005). The hypotheses of this study were formulated contingent to those preliminary factors which are the following: 1) Colonial Awareness 2) Ethnic and Cultural Self Image 3) Idea of Collective Wellbeing 4) Colonial Debt. Table 4.3 shows the hypothetical factors for the CSPR and their descriptors.

Table 4.3 Hypothetical Factors for the CSPR and their Descriptors

Hypothetical Construct	Descriptors
Colonial Awareness	Knowledge of the facts concerning colonialism in general, and U.S. colonialism in Puerto Rico in specific, and interest on and access to discussion of colonial issues.
Ethnic or Cultural Self-image	Discursive or behavioral perceptions of inferiority, shown through general undervalue of anything indigenous and an automatic and uncritical overvalue of anything coming from the colonizer.
Idea of Collective Wellbeing	Internalization of hegemonic discourse promoted by the structures of dominance. Regularly implemented by education, mass media and telecommunications.
Colonial Debt	Perceiving the colonizer as kind, well-intentioned, civilizing, liberating, or noble heroes. A discursive and behavioral normalization of maltreatment.

4.2.2 Second Step: Scale Design

Scale design involves deciding the type of scale to be constructed, the writing of the scale's instructions, and the production of an initial pool of items.

4.2.2.1 Type of Scale

The CSPR was developed as a five point Likert Scale. The original version of the scale was built out of the aforementioned four factors. It consisted of ninety items worded in the form of positive and negative assertions. The assertions are followed by response options consisting of a continuum of degrees of agreement that goes as follow: 5 = strongly agree, 4 = agree, 3 = undecided or do not know enough to give an opinion, 2 = disagree, while 1 = strongly disagree.

4.2.2.2 Scale's Instructions

Instructions on how to use and answer the scale should be written in a simple and clear form. They should also define any possibly confusing term or concept utilized in the instrument (Spector, 1992). The CSPR instructions were presented as follows:

"**Instructions:** Below are a series of assumptions related to Puerto Rico, the Puerto Ricans and their relationship with the United States. Note that when using the term American in any of the assertions we refer exclusively to Americans from the United States. To the right of each assertion you will find a scale ranging from 5 to 1. Please carefully read each assertion and express your opinion using the scale. The highest number in the scale, number 5, indicates that you strongly agree with the assertion, while the smallest, and number 1 means you strongly disagree. Number 3 indicates that you are undecided or do not know enough to give an opinion. We are not expecting a predetermined answer, what counts is your opinion.

4.2.2.3 Initial Pool of Items

An initial pool of items is a major component at this second stage of the scale construction. It is suggested that the initial pool of items be large; between ten and fifteen items for every hypothetical factor produced in the first step, or around three or four times the amount of items wanted in the final scale (DeVellis, 1991; Edwards, 1957; Spector, 1992).

The initial pool of items for the CSPR consisted of ninety items. Factor 1 includes items 1 to 13, Factor 2 includes items 19 to 53, Factor 3 includes items 54 to 75, and Factor 4 comprises items 76 to 90. Although the pool of items was drawn from the initial set of hypothetical factors, all of the items were listed in the scale with the factors deleted. Appendix E shows the original 90-item scale with their respective hypothetical constructs. An asterisk at the beginning of the assertion indicates a negatively worded assertion.

4.2.2.4 Characteristics of a Good Summated Scale

When constructing a new scale or revising an existing one, it is recommended that the items and instructions in the scale use clear and appropriate language, have no obvious errors or omissions, and items lack ambiguity or multiple ideas. It also calls for appropriate sentence length, (no more than eighteen words) and a reading level of 7th grade (DeVellis, 1991; Edwards, 1957; Johansen,.& Brooks, 2010; Spector, 1992).

It is also imperative that measurement instruments be culturally appropriate to the population and in their vernacular language (DeVellis, 1991; Hernández Sampieri, et al., 2003; Nunnally, 1978; Rubin & Babbie, 2005; Spector, 1992; Weinbach & Grinnell, 2003). Redundancy, however, with respect to content is an asset at this stage, says DeVellis (1991).

As previously mentioned, this researcher utilized the David & Okazaki's (2006) Colonial Mentality Scale for Filipino American (CMSfFA) as a starting point to develop the CSPR. The CMSfFA is the only scale designed to measure internalized colonialism that this researcher is aware of; yet it was not suitable to be use with Puerto Ricans due to cultural differences among groups. Although the Philippines and Puerto Rico have many circumstances in common, such as being colonized by Spain and seized in 1898 by U.S. during the Spanish-Cuban-American War, their peoples have many major cultural differences as well as historical and political outcomes (David & Okasaki, 2006; Fernós, 1996; Nadal, 2004; Rivera Ramos, 2001; Trías Monge, 1997). Language is one of the most relevant differences, as English remains as the primary language for Filipinos and Spanish for Puerto Ricans. The Philippines attained their sovereignty in 1946, while Puerto Rico has not yet done so(David, & Okazaki, 2006; Nadal, 2004; Rivera Ramos, 2001; Trías Monge, 1997).

4.2.3 Third Step: Pilot Testing

Pilot testing consists of choosing a small number of respondents to review and comment on the preliminary scale. Respondents should ensure clarity of the scale by identifying ambiguous or confusing items; confirm cultural suitability, simplicity of the instrument and language level appropriateness, as well as identifying items that cannot be rated along the hypothetical factors.

Pilot testing of the scale was equivalent to the process of face validity of the instrument. As with sample size, the amount of people to participate in the pilot or face validity for a newly developed scale is not clear. Some authors simply suggest "a small number or respondents", while others are more specific and propose any number ranging from 10 to 30 judges (DeVellis, 1991; Johansen,.& Brooks, 2010; Spector, 1992).

The original CSPR was distributed to fifteen experts in the areas of social work, colonialism, human oppression, or attitude scale construction. Instructions for face validity requirements, and a description of the preliminary set of factors that were believed to form part of the internalized colonialism construct were attached to the scale. Eight out of the fifteen judges (53%), completed the scale and returned them with recommendations. Some recommendations included wording modification in some items, changing or dropping some double-barreled items and those that might have the threat of social desirability. All of the judges regarded the topic of the scale as extremely important for the people of Puerto Rico and academia. The recommendations were analyzed based on attitude scale construction and colonial theory. The necessary adjustments were made on the scale, which made it ready for full administration and testing.

4.2.4 Fourth step: Scale Administration, and Items Analysis

The fourth step consists of two parts: scale administration, and items analysis.

4.2.4.1 Scale Administration

Three hundred packages consisting of the CSPR, the demographics survey, and informed consents were put together. A matching code was assigned to every set of instruments on every package, excluding the informed consent. Packages were personally distributed, although assistants helped by identifying groups of qualified subjects. These assistants helped in the distribution and collection of packages. Informed consents were discussed, and arrangements made for further collection of the completed packages. DeVellis (1991) and Spector (1992) agree that self-administration of scales help diminish bias due to social desirability, especially when assured that the only identification document (in this case the signed informed consent) would be detached from the instruments and placed on two different piles. The return rate of the distributed packages was 85% (254 out of 300). Rubin & Babbie (2008) consider a return rate of 70 percent as very good.

4.2.4.2 Items Analysis

The items analysis is the core of scale testing and validation. It includes data entry, data clean up and missing values handling, and reverse coding, when needed. Items evaluation for normal distribution of the data and for theoretical component is also done at this stage. The object of items analysis is to choose a set of items that form an internally consistent scale (Spector, 1992).

4.2.4.2.1 Data Clean Up and Missing Data

Once the collected data was entered in the SPSS 19 program, the researcher proceeded to clean the data. Out of the 254 cases entered, a total of five cases were

dropped, leaving a final N=249. Two cases were deleted because the subjects did not meet the sample criteria; one subject was Mexican, and the other was 17 years of age. Three more cases were dropped due to extraordinary amount of missing data; one of them only filled out the demographics.

The missing values per item in the data set were low. Sixty-six items had a certain amount of missing values, although out of those, fifty-seven items had only, one, two or three missing values. The highest missing data within an item was nine, but it consisted of only one item. Considering that the sample size was robust, the actual amount of missing data was not considered a big hazard. Still, the threat was handled by using *pairwise deletion*, in which the correlation is computed between each pair of variables (items) and omits only those cases with missing values (DiLeonardi, & Curtis, 1988).

4.2.4.2.2 Reverse Coding

In order to avoid or minimize agreement bias it is recommended that the scale assertions be written including wording positively and negatively. However, the negatively worded items values must be recoded prior to administering any statistical test. Fifty-five of the items in the CSPR were worded negatively. The values of those items were re-coded into the same variable as follow: (5=1), (4=2), (3=3), (2=4) and (1=5).

4.2.4.2.3 Items Distribution Normality and Theoretical
Evaluation

An assumption for factor analysis testing is that all variables must be normally distributed. When the variables are normally distributed, the resultant factor solution is also enhanced. One way of evaluating normality among individual variables is by

examining kurtosis' values (Mertler, & Vannatta, 2005; Tabachnick, & Fidell, 2003). Kurtosis is the degree of curve of a distribution of values in a variable. Kurtosis equals zero when distribution is normal, a highly positive value for the kurtosis indicates a distribution more peaked than a normal curve. A kurtosis value between + or - 1.0 is considered excellent, + or - 2.0 is sometimes acceptable depending on the application (George, & Mallery, 2011; Mertler, & Vannatta, 2005). A kurtosis evaluation for the original 90 items matrix for the CSPR revealed numerous items showing very high kurtosis value, one as high as 16.08.

The CSPR was concurrently assessed for the characteristics of a good fit item suggested in summated scale construction theory. Thirty-five items from the original scale were dropped considering that they did not have the appropriate fit for a summated rating scale. Items #32, 36, and 85 were dropped due to ambiguity; they were either not clear, too lengthy or had difficult reading level. Item #26 had a multiple negative, meaning that the item was written including a *not* or similar quotation. Two other items, #33, and 39 were double barreled; in other words, convey two or more ideas, so that an endorsement of the item might refer to either or both ideas. Seventeen items, #20, 21, 22, 24, 25, 27, 28, 34, 35, 38, 47, 48, 53, 64, 69, 74, and 82 had an extreme statement, either too mild or too strong. Most people would agree or disagree with the item. Twelve items were considered facts, which are not appropriate for attitude scales, so they were dropped as well. Those items were # 1, 2, 3, 5, 7, 8, 10, 11, 12, 14, 15, and 18; all of them coming from the Colonial awareness hypothetical factor. Appendix F shows the CSPR after the theoretical evaluation.

By dropping these items, the researcher took care of the not well fit for summated scale items and of most of the items with high kurtosis values. However,

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there were still twenty-four items with high kurtosis, so any item with a kurtosis value higher than 1.0 were then dropped. Items dropped were #4, 6, 9, 13, 19, 23, 30, 40, 42, 45, 49, 50, 52, 58, 59, 60, 65, 66, 67, 68, 72, 75, 81, and 88. Consequently, twenty-four more items were dropped due to high kurtosis. An advantage of having a large pool of items is that the researcher can eliminate some of them based on a priori criteria without damaging the scale (DeVellis, 1991). Appendix G shows the items that were dropped from the CSPR due to high kurtosis, and their respective values.

4.2.4.2.4 Factor Analysis Testing

The CSPR, now with only thirty-one items, was assessed using an Exploratory Factor Analysis test. Factor analysis consists of a number of statistical techniques that are used in the social sciences to simplify complex sets of data, usually applied to correlations between variables (Kline, 1994). The aim of exploratory factor analysis is to discover, from an original pool of items, a set of factors that can measure the construct or dimension the scale is trying to measure. The rule is to put in as many items as possible and see what loads on the appropriate factor. In other words, reduce a number of items to a smaller number of underlying groups of items called *factors*. Items that intercorrelate relatively high are assumed to reflect the same construct. A minimum value of about.30 is required to consider that an item loads on any factor. However, subjective judgment, and other criteria are also necessary to determine the number of factors and their interpretation (Kline, 1994; Mertler, & Vannatta, 2005; Spector, 1992).

Thirty-one items were submitted to an Exploratory Factor Analysis (EFA) test. Principal axis factoring was the extraction method utilized, with promax with Kaiser normalization rotation method The initial analysis retained eight factors, but when

items were scrutinized for conceptual meaning, it showed discrepancy. Consequently, sixteen items with lower factorial loading or high sharing loading within factors were deleted. The items deleted were item #16, 17, 29, 31, 37, 46, 51, 57, 63, 70, 71, 73, 77, 79, 83, and 89. Spector (1992) affirms that in choosing items for a scale a series of steps may be involved, deleting some items, checking alpha, deleting more items, and rechecking alpha, until a final set of items is chosen. Yet, he adds, there is no guarantee that the scale will achieve sufficient internal consistency in the initial attempt.

The CSPR, now consisting of fifteen items, was submitted to Exploratory Factor Analysis test with Principal Axis Factoring extraction was performed to determine if any underlying structure exists for the new set of items. A principal axis factor analysis produced a Kaiser–Meyer–Olkin (KMO), index of .934. KMO is a measure for the adequacy of the distribution of values for conducting factor analysis. Kaiser designates a KMO >.9 as marvelous (George, Mallery, 2011). Bartlett's test of sphericity was significant at p = .000 level, thus acceptable for factor analysis.

Four criteria were used to determine the appropriate number of factors to be retained: eigenvalue greater than 1, variance, Scree plot, and residuals. A Promax rotation suggested two factors to be retained. Factor 1 accounted for 48.93% of variance, and Factor 2 accounted for 9.29%. The cumulative percent of variance was 58.23%. Two factors had eigenvalues greater than 1. Eigenvalues for the factors were as follows: factor 1= 7.34, and factor 2=1.40. Evaluation of residuals indicated 22 (20.0%) no redundant residuals with absolute values greater than 0.05.

Unfortunately, as seen, the results did not fulfill the criteria for the appropriateness of factors to be retained. Eigenvalues greater than 1 is fairly reliable

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when the number of variables is <30 and communalities are >.70, or the number of

subjects in the sample >250 and the mean communality is = or > .60. Variance

components should account for at least 70% total variability (Mertler, & Vannatta,

2005). On the other hand, the Scree plot suggested that eigenvalues levels off after the

third factor level.

Mertler, & Vannatta (2005) states that although eigenvalues is the default

criteria for determining the number of factors, sometimes it can lead to inaccurate

number of factors to retain. They suggest conducting the analysis again overriding the

eigenvalue criteria and adding another factor. In fact, factor 3 had an eigenvalue of

.959, so the researcher decided to explore a factor model with three components.

A factor analysis was conducted again with promax rotation; this time

specifying a three factors retention. In terms of variance, factors 1 and 2 remained

unchanged accounting for 48.93% of variance and 9.29% respectively. However,

factor 3 added another 6.40% of variance. By adding a factor, the cumulative percent

of variance for this new model increased to 64.63%. The Scree plot remained similar

to the previous one, suggesting that eigenvalues levels off after the third factor level.

Likewise, residuals presented an improvement, decreasing to 13 (12.0%) no

redundant residuals with absolute values greater than 0.05.

After rotation, the final CSPR end up been composed of three factors. Factor 1

consists of eleven out of the fifteen items: 44, 54, 55, 56, 76, 78, 80, 84, 86, 87, and

90. Factor 2 consists of two items: 60, 61, and lastly, factor 3 includes the remaining

two items: 41, and 43. An assessment of factors loading was performed once again to

verify concurrence with hypothetical constructs or general colonial theory. The

factors' loading range from .555 to .901. Table 4.4 shows the loading values for each
item.

Table 4.4 Item Loadings and Assertions for the CSPR

Item Number	Assertions	Loading
	Factor 1	
Q90	We are ungrateful if we do not acknowledge all that the United States has done for Puerto Rico.	.901
Q56	Puerto Rico does not have enough resources to become an independent country.	.805
Q55	If Puerto Ricans chose to become independent from the United States the relations between the two countries would cease.	.805
Q86	The Americans demonstrate how charitable they are when they bring us their aid, for example: the scholarships, food stamps, and all the other funds that they give us.	.782
Q78	It has been an advantage that the Americans took an interest in Puerto Rico.	.756
Q76	The refined lifestyle we have achieved is indicative of the progress the United States brought to Puerto Rico.	.708
Q44	The American lifestyle is more sophisticated than that of Puerto Ricans.	.669
Q54	Puerto Ricans cannot survive without federal aid	.668
Q84	It is an advantage that we can use the American dollars.	.621
Q80	The mistakes made by the United States in Puerto Rico are a small price to pay in return for their acts of kindness they brought to us.	.602
Q87	We should do everything in our power to look good before the Americans.	.555
	Factor 2	
Q62	Pedro Albizu Campos, Lolita Lebrón and Filiberto Ojeda Ríos and other fighters for independence are national heroes of Puerto Rico.	.811
Q61	The celebration of the Cry of Lares (*Grito de Lares*) should be as important for Puerto Ricans as the celebration of the 4th of July for Americans.	.730
	Factor 3	
Q41	I care a lot about learning English even if I am not fluent in Spanish.	.736
Q43	I speak English whenever I can even though my native language is Spanish.	.694

Most factor loadings are in accordance with the originally developed hypothetical constructs. Except for item 44, the rest of the items on Factor 1 mainly came from the hypothetical construct labeled Colonial Debt and Idea of Collective Wellbeing. As the items merged, the concept fits better to the label *Colonial Discourse*. Items that loaded in Factor 2 were also originally in the hypothetical construct labeled Idea of Collective Wellbeing. This two items deal specifically with the issue of people's right to fight for sovereignty or self-determination, so it is now labeled *Idea of Colonial Resistance*. Finally, items that loaded in Factor 3 were originally in the hypothetical construct named Ethnic or Cultural Self-image. However, it now deal specifically with the cultural issue of language, so, it is now labeled *Language Identity*. Appendix H shows a diagram of the CSPR best-fit model.

Adjustments to the scale by itself were expected to improve reliability (Aiken, 1997). However, a Cronbach's alpha coefficient test was administered to the final version of the CSPR for a reliability assessment and confirmation. Cronbach's alpha for the CSPR=89.8. If the items successfully produce an internally consistent scale, the final step can proceed. Otherwise, one must return to an earlier step to revise the scale, says Spector (1992).

The CSPR model with fifteen items and three factors, previously discussed have the characteristics of a good representation for a simple set of items that form an internally consistent scale; consequently, it is accepted as the best fit for the CSPR. Appendix 9 shows a flowchart of the CSPR model with fifteen items and three factors.

For the precision of the future scale use, the loaded item numbers are now organized in a chronological order instead of the original loading item numbers. The

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item number changes are shown in Appendix I. The final version of the Colonialism

Scale for Puerto Ricans in Spanish is shown in Appendix J.

4.2.5 Fifth Step: Validate and Norm

Factorial validity was performed before and after collection of data was

completed, and after numerous adjustments was implemented to the scale. However,

as previously stated, scale validity is a continuous process. Further series of validation

studies should be conducted to verify that the scale behaves as predicted (Spector,

1992).

4.3 Results of the Scale Scoring

The scoring levels for internalized colonialism were developed as follows: a

total score raging between 15 to 34 points = High level of internalized colonialism;

raging between 35 to 54 = Moderate level of internalized colonialism; and those

raging between 55 to 75 = Low level of internalized colonialism. Therefore, higher

scores in the scale means lower levels of internalized colonialism, and lower scores

means higher levels of internalized colonialism. Appendix K shows a scoring chart

for the CSPR consisting of instructions for scorings and levels to classify internalized

colonialism.

The range of scores for this sample was 56, being the minimum score 19 and

the higher75. The mean of scores was 58.26 (SD = 12.73). The percentile on the

lower quartile = 50, the middle quartile = 60, and the higher = 69. The total of scores

falling on the high level of internalized colonialism accounted for 6.8%., 34.9% fell

on the moderate level of internalized colonialism and the rest 58.3% fell on the low

level of internalized colonialism. Evidently, the majority of the sample scored low to

moderate for the level of internalized colonialism.

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Since the majority of the scores of this sample fell on the moderate to low levels of internalized colonialism, the general hypothesis: Overall, Puerto Ricans have high levels of internalized colonialism was not supported by the results in this sample. Given that hypotheses 1to 4 were connected to the general hypothesis, the rest of the hypotheses were not supported either. Discussion of the findings will be provided in next chapter.

4.4 Summary of Major Findings

As the purpose of the study was the construction, testing and validation of a scale to measure internalized colonialism, a five point Likert scale titled Colonialism Scale for Puerto Ricans (CSPR).was developed. The initial items pool consisted of ninety assertions worded positively and negatively. Four hypothetical factors served as the starting point for the CSPR. The pool of items was scrutinized for the good characteristics of a summated rating scale's item. They were also submitted to evaluation for normal distribution of the items and theoretical component. Some items were dropped at this point. The new set of items was assessed using Exploratory Factor Analysis test. Principal axis factoring extraction method was used in combination with Promax with Kaiser normalization rotation method. KMO index for the final model selected was .934. Bartlett's test of sphericity was also tested, it was significant at $p = .000$ level, thus acceptable for factor analysis.

The final CSPR ended up been composed of three factors. Factor 1 consists of eleven out of the fifteen items, Factor 2 consists of two items, and lastly, factor 3 includes the remaining two. Most factor loadings are in accordance with the originally developed hypothetical factors Colonial Debt and Idea of Collective Wellbeing. As the items merged, the new label assigned to factor 1 was *Colonial Discourse*. Items

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that loaded in Factor 2 deal specifically with the issue of people's right to fight for sovereignty or self-determination, so, it was labeled *Idea of Colonial Resistance*. Finally, items that loaded in Factor 3 deal specifically with the cultural issue of language, so, it was labeled *Language Identity*.

Cronbach's alpha for the CSPR=89.8, suggesting that the items successfully produced an internally consistent scale. Consequently, the model is accepted as the best fit for the CSPR.

The minimum score for this sample was 19 and the higher 75. The mean of scores was 58.26 (SD = 12.73). The percentile on the lower quartile = 50, the middle quartile = 60, and the higher = 69. Consequently, the majority of the sample scores loaded somewhere between moderate to low levels of internalized colonialism.

The majority of the scores in the sample fell between moderate to low internalized colonialism. Thus the general hypothesis: Overall, Puerto Ricans have high levels of internalized colonialism was not supported by the results on this sample. There might be some explanations to these results which will be discussed in chapter 5. Given that Hypotheses 1 to 4 were connected to the main hypothesis, the rest of the hypotheses were not supported either.

CHAPTER 5

DISCUSSION

This chapter presents an analysis of the findings of the study to test a proposed

scale to measure colonial awareness in Puerto Rico. It includes a discussion of the

limitations and strengths of the study. It also incorporates a debate about implications

for the social work profession, social work education, and social policy. The chapter

concludes with recommendations for further research.

5.1 Analysis of the Findings

5.1.1 Theoretical and Demographic Outcomes

US colonialism in Puerto Rico is a debatable issue, and a seldom discussed

topic in the social work discipline. As Cannella & Viruru (2004) stated, colonialism is

a concept that many in the United States deny or are unaware of. However, as

previously discussed, there is ample evidence supporting the proposition that Puerto

Rico is de facto a colony of U.S.A. Theoretical and empirical literature, as well as

demographic and economic analysis support the assertion of a current and deep

psychosocial effect of colonialism. While it is necessary to be cautious because of the

non-probability sample used, the demographics of this sample point to some of the

socio-economic conditions already demonstrated in the literature review.

Economic burden and exploitation is one of the most significant effects of

colonialism. As stated by Marxuach (2010), income inequality is highly related with

social problems such as low life expectancy, high infant mortality, obesity, mental

illness, addictions, and crime, among others. The demographics of this sample

confirm the aforementioned portrait of a society living by the standards of a

developed country but with an incompatible income. Out of the 249 subjects, 66.7%

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(n = 166) were female, and 32.5% (n = 81) male. Although the majority of the subjects in this sample had higher education; 58.2% had some sort of college education, 22.1% had a master's degree or were enrolled in a master's program, and 6% had a doctoral degree or were enrolled in a doctoral program, the family income was incompatible with years of education.

Over half of the sample, 62.4% reported an annual family income of $39,999 or less. Out of the 62.4%, 25.6% had an annual family income of less than $20,000. Only 5.6% reported a family income of $80,000 or above.

The majority of the subjects in the sample, 92.4%, were born in Puerto Rico, the rest, 4.8%, were born in USA, however, 93.2% have visited US at least one. Almost half, 47% have been in US few times visiting, the rest, 44.4%, lived in US somewhere around less than a year up to more than eleven years. These results are very congruent with the theory of circular migration documented by Duany (2002) and Juhász-Mininberg (2004).

Regarding experiences traveling to other countries out of Puerto Rico and US, 43.9% had travelled either to one or two countries out of Puerto Rico and US; while 17.9% had not. The country most travelled was Dominican Republic, 54%, this was followed by 14.8 who visited the Caribbean (not D.R.), and 16.5% visiting Central or Latin America (not the Caribbean). A good amount of the people who mentioned having been traveled to three or more countries was either in Caribbean Cruises or as a member of the US Army. On the other hand, 28.9% had never travelled to any country other than US.

The migration and traveling patterns show the close interaction of Puerto Ricans with US. It is significant to see a higher traffic toward US, compared to the nearby

countries which are more culturally similar. In part it might have to do with the fact of not needing a passport or visa to travel to US versus traveling to other countries. It is also important to keep in mind that more than double the Puerto Rican population in Puerto Rico live in USA, thus, most Puerto Ricans have relatives and friends in the US who they keep in touch with. It is like a big family broken by physical distance but with very tight bonds. It is common for Puerto Ricans to reunite with their significant others in US for weddings, births, sickness, graduations and many other such a like events, as suggested by the aforementioned *guagua aérea* (see chapter 2). Besides family ties, education, employment and armed forces are among the main reasons for this mobility. Many Puerto Ricans choose to continue their higher education in the US, also, as previously discussed, jobs opportunity in the US has always been an escape valve to the socioeconomic problems in Puerto Rico.

Religion is another aspect affected by colonialism. Taínos were animists, but forced by Spanish colonial rule to convert to Catholicism. Then Protestantism was introduced by US rule. The Traditional and the Liberation Theology Catholics together represented 41.2% of the sample. Protestant on the other hand constituted 35.9%, followed by 18% who asserted not having any religion of preference. This is a big change in one hundred and thirteen years within US colonialism.

The results for the question about political ideology was surprising, 51.2%, claimed not having any political party of preference. The political party of preference for 22.1% was the PPD (pro Commonwealth party) followed by 11.7% who preferred the PIP (pro Independence party), and 9.2% with the PNP (pro Statehood party). The rest favored the PPP (which does not identify with any political status) 1.3%, and 4.9 with other, which could be the Nationalist Party or a new movement which is in the

process of getting inscribed as a party, MUS (Sovereigns Movement). It is remarkable that the political party presently in control, who won past elections by a huge margin ranked four, even under the PIP who has been the party with less amount of votes during the last three elections. This could be just a particularity of this sample, but could also show the big dissatisfaction of people with the late socioeconomic disorder, as presented in the literature review.

5.1.2 Scale Construction Process Outcomes

The Colonialism Scale for Puerto Ricans (CSPR) is a five point Likert scale with assertions worded positively and negatively, and a response option consisting of a continuum of degrees of agreement that goes from strongly agree to strongly disagree, and a mid point for undecided or do not know enough to give an opinion. The very first scale with an initial pool of items for the construction of the CSPR were submitted to a face validity/pilot testing process which included experts in different areas such as: social work, colonialism and scale construction. The scale was adjusted after piloting/face validity; it ended up with ninety items distributed in four hypothetical factors. The scales and demographic survey were distributed to 300 subjects in a non random selected sample. Two hundred fifty four scales were returned, after data cleaning and cases dropped N=249.

One of the four initial hypothetical factors, Colonial Awareness, was eliminated after rigorous analysis for good characteristics of a summated scale item and items correlation. The items in this hypothetical factor were supposed to measure knowledge of the facts concerning colonialism in general, and U.S. colonialism in Puerto Rico in specific. Interest in, and access to discussion of colonial issues was

also part of this factor. However, measuring facts is not suitable for attitude scales, so these items will show some flaw if left in the scale.

As expected, most of these items showed high skewness in the items analysis test. Nevertheless, the skewness in these items suggests the call for further specific analysis. As affirmed in colonial theories, one of the most important traits in the internalization of colonialism is precisely lack of knowledge regarding the issue. Lack of knowledge or misconceptions about issues of colonialism will turn into confusion and acceptance of the colonial discourse. The latter will be transformed then into feelings of colonial debt and the living on the superiority image of the colonizer.

A considerable amount of items showed high kurtosis after item analysis. These items were dropped from the pool of items going under factor analysis for the CSPR validation. However, even when these items were mathematically inappropriate for the scale factor analysis a subjective evaluation of the items suggests that most of these items are related to national identity. For example, item #24, with a kurtosis of 16.8 stated the following: *I feel pride for Puerto Rican traditions*, or #28, with a kurtosis of 5.65 which stated this: *I make every effort to preserve Puerto Rican traditions.* As presented in the literature review, national identity in Puerto Rico has been shown in empirical studies as well as in many social instances to be very strong. Therefore, it would be expected that most people would agree or disagree with those items. However, it is a corroboration of the results of this study with previous empirical studies and social behavior in Puerto Rico.

After the exploratory factor analysis test with Promax with Kaiser Normalization rotation method, the CSPR ended up being composed of fifteen items

loading in three factors. Factor 1 consists of eleven items, Factor 2 consists of two items, and lastly, factor 3 includes the remaining two.

Most of the items that loaded in factors 1 and 2 were originally in the hypothetical factors Colonial Debt and Idea of Collective Wellbeing. The descriptor for the hypothetical factor Idea of Collective Wellbeing was: internalization of the hegemonic discourse promoted by the structures of dominance, regularly implemented by education, mass media, and telecommunications. The descriptor for the hypothetical factor Colonial Debt was: perceiving the colonizer as kind, well-intentioned, civilizing, liberating or noble heroes. It is the discursive and behavioral normalization of maltreatment.

Only items 41, 43, and 44, were originally in the hypothetical factor Ethnic or Cultural Self-image. The descriptor for this hypothetical factor was: Discursive or behavioral perceptions of inferiority shown through general undervaluing of anything indigenous, and an automatic and uncritical overvaluing of anything coming from the colonizer.

Since the items that loaded in Factor 1 are a merge from two different hypothetical constructs, the label for the factor is now *Colonial Discourse*. Conversely, items in Factor 2 are now more specific than when they were in the original hypothetical construct. They have to do specifically with the issue of people's right to fight for sovereignty or self-determination, so, it is labeled *Idea of Colonial Resistance*. Finally, items that loaded in Factor 3 deal specifically with the cultural issue of language, so, it was labeled *Language Identity*.

The loading values in the final model for the CSPR were rather high. While the minimum factor loading value expected for a summating scale is .30, the lower value

in the CSPR was .555, the higher was .901(Spector, 1992). Another expectation when constructing a scale is that each variable will have a large loading on one and only one factor (Spector, 1992). None of the items in the CSPR loaded in more than one factor. Other criteria for factor loading selection such as variance and residuals were also appropriate in the final model selected.

Cronbach's alpha for the CSPR=89.8. Nunnally (1978) established a Cronbach alpha of .70 as the lower acceptable for scale reliability, DeVellis (1991) considers a Cronbach alpha between 80-90 as very good; anything higher than that should consider revision of the length of the scale, he says Considering all the above, the researcher understands that the model produced an internally consistent scale, therefore accepts the 15 items and three factors model as the best-fit model for the CSPR.

Although validity and reliability was confirmed for the fifteen item CSPR, the hypothesis that overall, Puerto Rican adults have a high internalized colonialism was not supported with this sample. The mean of scores was 58.26 (SD = 12.73). A scoring chart developed for the CSPR scale is as follows: a total score raging between 15 to 34 points = **H**igh level of internalized colonialism; 35 to 54 = **M**oderate level of internalized colonialism; and 55 to 75 = **L**ow level of internalized colonialism. The total of scores for this sample on the high level of internalized colonialism accounted for 6.8%., 34.9% fell on the moderate level of internalized colonialism and the rest 58.3% fell on the low level of internalized colonialism.

Evidently, the majority of the sample scored low to moderate for the level of internalized colonialism. Obviously different factors may be considered to explain the results. One of them could be the characteristics of the sample. As aforesaid, lack of

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awareness or misconceptions about issues of colonialism, has been identified as an important factor for internalized colonialism. As previously discussed, this sample was a highly educated one. Even the subjects with less education in the sample, besides the three persons who had Jr. High education or less, were expected to have more awareness than ordinary people due to the type of school they attended. These students attended the University High School (a laboratory school of the University of Puerto Rico). This school is known by its endeavor to develop critical thinking in their students. This is not to be interpreted that only people with formal education would have less internalized colonialism because popular education and many other factors can influence people's colonial awareness

Political party of preference might be another indicator of colonial awareness; only 9.2% of the sample identified with the PNP (pro Statehood party) versus 11.7% who identifies with the PIP, and 51.2% who claimed not having any political party of preference. The rest favored the PPP (which does not identify with any political status) 1.3%, and 4.9 with other, which could be the Nationalist Party or a new movement which is in the process of getting inscribed as a party, MUS (Sovereigns Movement). It is expected that those supporting the PIP, MUS, and the Nationalist parties would have less internalized colonialism than those who support other political party. It is also known in Puerto Rico that supporters of independence not necessarily sympathize with the PIP, therefore there is always a possibility that out of the 51.2% who claimed not having any political party of preference there will be pro independence supporters. On the other hand it would be expected that those who supports the PNP or the PPD would have internalized more the colonial discourses

and colonial debt. Of course, these are speculations that can be verified only with further research.

5.2 Limitations and Strengths of the Study

Any research study has its own limitations and challenges; since some of them cannot be eliminated, it is necessary to minimize them, or at least be aware of them in advance so that it will be taken in consideration in the data analysis (Rubin & Babbie, 2005). Perhaps one of biggest limitations of this study was the non-probabilistic sampling. Although the attempt to get a heterogeneous sample was made, when it came to education and political ideology the goal was not accomplished.

5.2.1 Limitations

The convenient non-probabilistic sample for the scale validation is one of the major limitations of this study. In this study the sample was skewed to a group of more educated people. It is possible that some people did not see the relevance of the study, or may even feel threatened by the topic, so probably those who were willing to participate were in fact more interested and aware of internalized colonialism. In fact, one of the cases deleted belonged to a person who refused to answer the CSPR because he would be afraid of political persecution in his governmental job. Another person, in form of a joke, said that scale was a *carpeta*, referring to those files that were put together for independence supporters' persecution. The CSPR provoked various other positive and negative comments and reactions while people were completing it.

The length of the scale was another limitation; some people complained about it being too long. This fact might also skew the results in some way.

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As with any other self administered scale, it is a limitation that only people who can read can answer it or those with difficulty reading will also have difficulty completing it. Lastly, since the CSPR is a new scale, there were no other scales available to perform other type of scale validation such as content or construct validity.

5.2.2 Strengths

Several strengths have been identified which will bring some balance to the aforementioned limitations. One of the major strengths of the study is the type of scale selected for the CSPR. The Likert's self-report attitudes scales are the most valid approaches currently available (Aiken, 1996; Nunnally, 1978). Summated self-report scales have their limitations but also their strengths, one of the most relevant one is that if the person is literate Likert scales are easy to complete.

Another major strength of this research is the relevance of the topic of study. This is one of the few empirical researches performed on colonialism and social work, and probably the first scale designed specifically for Puerto Ricans to measure internalized colonialism. Actually as revealed in the literature review the people of Puerto Rico have managed to bring back the discussion of the case of US colonialism in Puerto Rico to the United Nations Decolonization Committee, which consequently has compelled reactions at the White House, and the Congress.

The topic also has been getting more attention lately in the social work education and practice in Puerto Rico. In fact, the *Colegio de Trabajadores Sociales de Puerto Rico* [CTSPR] (Puerto Rican Association of Social Workers) established in November 12, 2005 a Permanent Commission on Political Status. This commission is working on facilitating a process of awareness and reflection about the Puerto Rican

political status and its impact to the profession of social work. In conjunction with other commissions the Commission on Status is creating an Ethical and Political Project for the CTSPR.

All of the above, in addition to the researcher's own personal knowledge and experience provides important strengths to this study. Ultimately, the initial purpose of the study, consisting of creating, testing and validating the CSPR was accomplished.

5.3 Implications for Social Work

The implications for social work provided by this study are many, some of them already mentioned. It includes social work practice, education, and social policy. Issues of oppression, human rights, social justice, social and economic development, self-determination, conscientization, empowerment, as well as individual self-concept and collective self-esteem, are all related to colonialism. Similarly, all of them are also important elements of the social work profession principles and values. Most of these concepts are endorsed by national and international social work regulating organisms: the Council on Social Work Education (CSWE), National Association of Social Workers (NASW), International Association of Schools of Social Work (IASSW), International Federation of Social Workers (IASSW), *Colegio de Trabajadores Sociales de Puerto Rico* (*CTSPR*) [Professional Association of Social Workers of Puerto Rico], and the *Asociación Latinoamericana de Enseñanza e Investigación en Trabajo Social (ALAEITS*) [Latin-American Association on Social Work Education and Investigation].

5.3.1 Social Work Education

As Canella & Viruru (1979) asserts, the processes of colonization have impacted the academic disciplines but its aspects are not very well known among educators. Most of the time with the best intentions; social work education is performed in a way that reinforces colonialism. As Ife (2007) stated, colonialism involves acting in someone else's "best interest", a familiar territory for social workers. Teaching the traditional methods of social work, casework, group work, and community organization usually focus on the individual's problems or needs but rarely on the structural forces that provoke those problems. Thus, students are taught to change the individuals or help in their adaptation to society rather than in working with them to impact the structures that provoke the problem. Actually, social workers usually refer to the people who receive their services as clients. This conceptual term by itself presents the professional as the expert who has the answers, and clients as the recipients of their knowledge. This type of provider/consumer dualism is similar to the banking education presented by Freire (1990) where the educator gives and the student receives. The use of American textbooks leads to concept of professional imperialism as well. Jim Ife (2007) described it very well when he stated that it is easy for social workers to assume that the social work and education they know is what other people's need.

The Council on Social Work Education (CSWE) is the organism that regulates social work education in Puerto Rico. As previously mentioned, this organism works on the bases of the principles and values of the social work profession, however at times cultural differences clash with their educational standards. For example, race presents a problem in Puerto Rico when dealing with issues of diversity. Puerto

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Ricans are a mixture of Taínos, Africans, and Spanish; it is very hard to make social classification based on race. Other types of diversity would be more feasible to work with from the Puerto Rican perspective. Colonialism, on the other hand, which is a real issue in Puerto Rico, is not included in the Educational Policy and Accreditation Standards.

5.3.1.1 International Social Work Education

International social work, with a lack of debate or analysis about the dangers of colonialism, and the knowledge of people's history of colonialism will only perpetuate colonialism. Power and oppression must be part of the international social work curriculum. Not analyzing the history of oppression and power of international countries will only turn to be an incomplete view, which is usually composed by cultural traits and values. It is not uncommon to see social workers who deal with Puerto Ricans in the US to ask for a green card. Just recently, there was a case of a Puerto Rican male who was arrested and the migration organisms waiting to deport him because he did not have "his migration papers" on him. Social work intervention in a situation like this will be very inaccurate if not aware of the colonial situation of Puerto Rico.

International social work on the other hand should not be about imposing techniques and methodologies to others, but also about learning from others. One of the characteristics of the colonizer is its feelings of superiority, so an auto evaluation process of such internalized attitudes must be part of international social work if the intension is to work from equalitarian bases.

Although originally developed on a teaching premise, the Pedagogy of the Oppressed is extremely useful on the social work practice. It is a model of

intervention widely recognized but rarely used or even discussed in social work. Brazilian Paulo Freire initially developed and implemented the *Pedagogy of the Oppressed* to educate victims of colonialism. He believed that popular education works toward the transformation of society by people or the masses. Popular education works by unmasking hegemonic forces and understanding the reality behind ideology. This of course will turn up in the empowerment of people who would not wait for institutions or agencies to solve their problems, but they will become part of the solution. It is a form of participative democracy instead of a representative democracy. People would be part of the social policy evaluation and development.

The model is based on a horizontal and powerless relationship between student and teacher (social worker/participant). Thus, teachers (social workers) are not portrayed as experts, but rather as guides, and at times, also as participants of the process. The Pedagogy of the Oppressed is "…animated by authentic, humanist (not humanitarian) generosity…never practiced by the oppressor" (Freire, 1990, p.30). It is supported by the dialogue, reflection and communication, by posting questions or problems instead of bringing pre-established curriculums or the monopoly of the truth. After the questions or problems are posted, teachers (social workers) can bring resources such as videos, pictures, music, poems, journals, or any other active learning tools to provoke the reflection, discussion, and eventually praxis and transformation of the student (participant) and their environment. In the pedagogy of liberation, knowledge emerges from people's invention and re-invention with the world and with each other; they see the world not as a static reality but as a world on transformation. By transforming the environment, people transform themselves.

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In the process of international social work education it is also imperative to understand the sources of poverty and inequality, most of the time strongly related to colonialism (Amin, 1976). People are not poor because they are lazy or do not work hard enough. Actually there is evidence, even in the US of the poorer working harder but getting paid less (Stoker & Wilson, 2006).

5.3.1.2 Social Work Education in Puerto Rico

Accordingly to the already discussed regarding social work education it can be concluded that understanding psycho-socio dynamics in the context of the history, culture and politics could help develop models of education and intervention in social work more consonant with the Puerto Rican people. A Puerto Rican model of social work should be based on the elements previously discussed, and moved away from the U.S. pathology model of assessment, and remedial, crisis-oriented approach to service delivery, as described by Mayadas and Elliott (1997). In fact, Midgley and Tang (2001) affirm that those limited remedial social services were introduced by the colonial authorities; similar to the introduction of social work profession in Puerto Rico.

The Puerto Rican social work model is on its way; steps have been done towards it. Representatives of the different social work programs in Puerto Rico are members of the Puerto Rican chapter of the *Asociación Latinoamericana de Enseñanza e Investigación en Trabajo Social (ALAEITS)* [Latin-American Social Work Teaching and Research Association]. This group is working towards the development of national social work research and diffusion.

Books and articles from the Puerto Rican social work perspectives have been proliferating. Among many others, *Las Pioneras de Trabajo Social en Puerto Rico*

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(1998), *El Trabajo Social en el Caribe Hispano Antillano* (2006), *Trabajo Social Clínico en Puerto Rico: construcción de la personalidad puertorriqueña* (2010) can be mentioned. However, there is a need for more institutional support in order to continue and increase these efforts.

5.3.2 Social Work Profession

The social work profession is based on three principles and values that are extremely related to colonialism: self-determination, social justice human rights. If social workers believe in the principle of individual's self-determination, then support of the right for self-determination of the people who live in colonial territories is mandatory; the same is to be said about social justice and human rights. Not doing so becomes an ethical dilemma for social workers.

Still there are sixteen formal colonial territories, plus the unique case of Puerto Rico. Although social workers and social work organizations condemn social injustice and oppression, they rarely challenge the systemic forces that provoke them (Seda, 2009) Social Work organizations, worldwide should include the issue of colonialism in their work agenda. As for Puerto Rico, the CTSPR already have, but international support from other social work organizations should also be added.

Models of liberation, as the one proposed by Paulo Freire should be spreading rapidly, not only in Puerto Rico, but anywhere else. As presented in the literature review, colonialism was so spread out in the world until mid 1900's that it is difficult to think of a population group who has not experienced some sort of internalized colonialism in one way or another, either from the colonized or from the colonizer perspective.

Freire's contribution can be applied and adapted to any group of people; it is especially helpful in group work practice, and in community organization. It is an excellent method to be used with adolescents; it has been used in psychiatric settings, prevention nursing wards, and in drugs and alcohol treatment and prevention.

5.3.3 Social Policy

One of the major concerns of social work in Puerto Rico is precisely social policy. As stated by Raquel Seda (2009), economic dependency, political subordination, and social inequality are the cause of social exclusion and marginalization. Social work practice, however, has been generally performed utilizing a remedial model of social work. Social workers in Puerto Rico, have been mostly implementing social policies, which were also developed in a US context. Most funds for social programs in Puerto Rico come from the US federal government. Those funds also bring rules and regulations with them, obviously imposed from a foreign perspective. The people of Puerto Rico have very little power under the present colonial rule to implement their own politically correct social policies. Social workers on the other hand are rarely directly evolved in the development or evaluation of those policies or regulations implemented by the Puerto Rican government who administer the colony.

5.4 Recommendations for Further Research

The construction and testing of the CSPR was successfully accomplished, and may be considered an available scale to measure internalized colonialism in the Puerto Rican community, in Puerto Rico or abroad. However, it cannot be said that the scale is completed validated, as stated by Spector (1992), validation is a continuous process. This study, nonetheless, set the infrastructure for future research

in that direction. A similar design could now be performed, with the best-fit model for the CSPR and a different sample, hopefully with more heterogeneity regarding education and political ideology. Another design might include a comparative study of people representing the three main political ideologies. One can also include a separate test regarding knowledge about colonialism and compare the results with the CSPR scores. After more solid validity, it would be proper to compare the scores of the CSPR with results of scores of individual and collective self esteem.

Regardless of its limitations, this study is an important contribution to research, social work and the people of Puerto Rico. McNown Johnson & Rhodes (2005) stated that the optimal functioning of the social system may depend on a disruption of the present balance. By doing so, they affirm, a new, more successful pattern may emerge. In accordance with the Critical Science Paradigm this researcher expects that this study would be a contribution towards the challenging of the present colonial rule in Puerto Rico. It is her desire that the CSPR will be a tool used in further research in social work, and beyond. It is also an aspiration that the discussion of this study will arouse a debate that contributes to the emergence of an optimal functioning of the present social system, especially in the social work profession.

5.5 Final Thoughts

The social work profession must understand the psychosocial and political forces that influence the Puerto Rican people. The incorporation of emancipative techniques and services cannot be done with traditional interventions that attempt to cure Puerto Ricans from being who they are (Riestra, 1974). The emancipator intervention must be embracing the native authenticity and essences, differentiating it from the model of domination (Rivera Ramos, 1998). In any case, Puerto Ricans as

individuals and as a collective are a vivid example of resilience; a good social work

education and practice should rest on this paradigm.

APPENDIX A

TABLE 2.1

Sixteen Non-Self Governing Territories and their Respective Administering Powers

Territory	Administration
Africa	
Western Sahara	Spain
Atlantic and Caribbean	
Anguila	United Kingdom
Bermuda	United Kingdom
British Islands	United Kingdom
Cayman Islands	United Kingdom
Falkland Islands (Malvinas)*	United Kingdom
Montserrat	United Kingdom
St. Helena	United Kingdom
Turks and Caicos Islands	United Kingdom
US Virgin Islands	United States
Europe	
Gibraltar	United Kingdom
Asia and Pacific	
American Samoa	United States
Guam	United States
New Caledonia	France
Pitcairn	United Kingdom
Tokelau	New Zealand

* A dispute exists between the Governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).
Source: United Nations (2011)

DEMOGRAPHIC SURVEY

_____ Código de pareo para escalas (para uso administrativo solamente)

Instrucciones: Seleccione la contestación que mejor le describe a usted haciendo una X al lado de la respuesta de su preferencia, cuando sea necesario llene el espacio en blanco con la información que se le pida.

1.   ¿Qué edad tiene?
     _____

2.   Usted es...
     _____ Hombre _____ Mujer

3.   ¿Cuál fue el último grado escolar que completó?
     _____ Ninguno
     _____ Escuela elemental
     _____ Escuela intermedia
     _____ Comenzó escuela superior
     _____ Completó escuela superior
     _____ Comenzó la universidad
     _____ Completó la universidad
     _____ Estudios graduados
     _____ Mencione
     _____ Estudios Post-Doctorales

4.   ¿A qué se dedica?
     _____

5.   ¿Para qué tipo de compañía o agencia trabaja?
     _____ Pública
     _____ Privada
     _____ Gobierno Federal
     _____ Negocio propio

6.   ¿Cuál es el ingreso anual aproximado de su familia?
     _____ Menos de $20,000
     _____ $20,000-$39,999
     _____ $40,000-$59,999
     _____ $60,000-$79,999
     _____ $80,000-$99,999
     _____$100,000 ó más

(Si **NO es estudiante**, por favor pase a la pregunta número 10)

7. ¿Cuál es su Promedio Académico General actual?
   _____ Menos de 2.49
   _____ 2.50 – 2.99
   _____ 3.00 – 3.49
   _____ 3.50 – 4.00

8. ¿Cuál es su concentración académica? _____

9. ¿En qué año académico está actualmente? _____

10. ¿Dónde nació?
    _____ Puerto Rico
    _____ Estados Unidos
    _____ Otro, especifique _____

11. Si nació en Puerto Rico ¿Cuál es su pueblo natal?
    _____

12. ¿En qué pueblo(s) ha pasado la mayor parte de tu vida?
    _____

13. ¿Alguna vez ha estado usted en Estados Unidos?
    _____ Sí
    _____ No

14. ¿Cuánto tiempo estuvo en Estados Unidos?
    _____ Una vez, de visita
    _____ Varias veces, de visita

    Viví Menos de un año   Corrido _____ Interrumpido _____
    Viví De 1 a 5 años   Corridos _____ Interrumpido _____
    Viví De 6 a 10 años   Corridos _____ Interrumpido _____
    Viví Más de 11 años   Corridos _____ Interrumpido _____

15. ¿Qué sitios fuera de Puerto Rico, que no sea Estados Unidos ha visitado? ¿Con qué frecuencia?

Sitio	Frecuencia

16. ¿En qué país o países estudió usted la…

	En Puerto Rico	En Estados Unidos	Ambos	Otro
Escuela Elemental				
Escuela Superior				
Universidad				

17. ¿En qué área se encontraban las escuelas o universidad donde estudió?

	Área Metropolitana	Área Rural	Ambos	Otro
Escuela Elemental				
Escuela Superior				
Universidad $_1$				
Universidad $_2$				

18. ¿A qué tipo de escuela y universidad asistió?

	Pública	Privada	Otro, especifique
Escuela Elemental			
Escuela Superior			
Universidad			

19.   Mencione otras formas de educación popular (no formal) que haya tenido. (Ej. Ballet, teatro, etc.)

_____

_____

20.   Menciona los grupos culturales a los que hayas pertenecido.

_____

21.   Menciona los grupos políticos a los que hayas pertenecido.

_____

22.   ¿Con cuál religión se identifica?
_____ Ninguna
_____ Católica tradicional
_____ Católica, Teología de la Liberación
_____ Protestante, especifique _____
_____ Otra, especifique _____

23.	¿Con cuál partido político se identifica usted?
	_____ PIP
	_____ PNP
	_____ PPD
	_____ PPP
	_____ Otro
	_____ Ninguno

24.	¿Con cuál partido político se identifica o identificaba su familia?
(Puede escoger más de uno)
	_____ PIP
	_____ PNP
	_____ PPD
	_____ PPP
	_____ Otro
	_____ Ninguno

APPENDIX C

INFORMED CONSENT (SPANISH VERSION)

CONSENTIMIENTO INFORMADO

INVESTIGADOR PRINCIPAL: María de Lourdes Martínez Avilés, Candidata a Ph.D.

TÍTULO DEL PROYECTO:
El Efecto Individual y Colectivo del Colonialismo de Estados Unidos en Puerto Rico y su Efecto en la Educación y Práctica del Trabajo Social: Construcción y validación de una escala.

INTRODUCCIÓN
Usted ha sido elegido para participar en un estudio investigativo. Su participación en el mismo es voluntaria. S i usted tiene alguna duda o no entiende hay algo que no entiende, por favor haga todas las preguntas que estime necesarias.

Este Consentimiento informado explica lo que significa ser voluntario(a) en un estudio de investigación. Es importante que usted lea detenidamente este material y entonces decida si desea participar como voluntario(a) en el mismo.

PROPÓSITO:
Esta investigadora está realizando un estudio investigativo como parte de su requisito final par el título de doctora en trabajo social de la Escuela de Trabajo Social de la Universidad de Texas en Arlington y la Universidad Autónoma de Nuevo León, en México. Esta investigación consiste de la validación de varias escalas de medición.

DURACIÓN:
Contestar los documentos le tomará de 30 a 60 minutos aproximadamente. Su participación termina una vez concluidas las escalas y el documento sobre la información socio demográfica.

PROCEDIMIENTO:
Esta investigación consiste de tres escalas o cuestionarios en los cuales usted seleccionará con una marca de cotejo la contestación que mejor represente su opinión. Además se incluye un documento separado que le pide una información socio demográfica.

POSIBLES BENEFICIOS:
Los posibles beneficios de su participación son: 1) la satisfacción de haber contribuido al enriquecimiento de la profesión de trabajo social y 2) en el desarrollo de instrumentos estandarizados específicamente diseñados o ajustados para la población puertorriqueña.

Los resultados de esta investigación se presentarán en la defensa de la tesis doctoral de la investigadora, en la Universidad de Texas en Arlington y en la Universidad Autónoma de Nuevo León.

MAR 0 2 2011

COMPENSACION:
No existe compensación alguna por la participación en este estudio.

APPROVED

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16 October 2007

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POSIBLES RIESGOS O MOLESTIAS:
No se prevé riesgo o molestia alguna asociada con la participación en este estudio.

TRATAMIENTOS O PROCEDIMIENTOS ALTERNATIVOS:
No existen procedimientos o tratamientos alternativos disponibles si usted decide no participar en este estudio.

RETIRADA DEL ESTUDIO:
La participación en este estudio es voluntaria. Usted puede negarse a participar o puede retirar su participación en cualquier momento sin que ello conlleve alguna consecuencia negativa en contra suya.

NÚMERO DE PARTICIPANTES: Esperamos la participación de 320 personas en este estudio.

CONFIDENCIALIDAD:
Se realizarán todos los esfuerzos posibles ara mantener la confidencialidad de los resultados de esta investigación. Una copia de los expedientes de esta investigación se guardará, por espacio de tres años, una vez terminada la investigación, en un archivo bajo llave en la oficina personal de la investigadora. Los resultados de la investigación podrán ser publicados o presentados en conferencias sin mencionar su nombre como participante voluntario. Aunque sus derechos y privacidad serán protegidos, la Junta Examinadora Institucional (Institutional Review Board (IRB) de la Escuela de Trabajo Social de la UTA, y el personal particular de esta investigación (el comité doctoral de las Escuelas de Trabajo Social de la UTA y la UANL) TIENEN ACCESO A LOS EXPEDIENTES DEL ESTUDIO. Su expediente se mantendrá resguardado de forma confidencial según lo requieren los estatutos vigentes del IRB.

En la situación poco probable de que la Junta Examinadora Institucional tuviera que revisar su expediente de la investigación, la Universidad de Texas en Arlington protegerá la confidencialidad de su expediente, al grado que lo exija la ley. Su expediente no se harán públicos a menos que sea solicitado por corte. Los datos que obtengamos como producto de su participación se podrán compartir con otros(as) investigadores con la intensión de realizar investigación, las cuales no están necesariamente detalladas en este protocolo. No obstante, los datos que se compartan no tendrán ninguna información que les puedan identificar a usted o identificar su participación en cualquier estudio.

PARA MAYOR INFORMACIÓN:
Cualquier pregunta relacionada con esta investigación o a sus derechos como sujeto de investigación puede dirigirla a María de Lourdes Martínez Avilés al (787) 955-7171 . En caso de alguna lesión puede también contactar a la encargada de la Junta Examinadora Institucional al 817-272-3723.

CONSENTIMIENTO:
FIRMAS:
Como representante de este estudio, he explicado el propósito, los procedimientos y los beneficios y riesgos que puedan surgir como producto de su participación en este estudio.

16 October 2007

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_____

Nombre en letra de molde y firma de la investigadora o persona que hace entrega de este
consentimiento. Signature and printed name of principal investigator or person obtaining consent
Date

**Al firmar este documento usted confirma que ha leído este documento. A usted se
le informó sobre el propósito, los procedimientos y posibles beneficios y riesgos
de participar en el estudio. A usted se le ha dado la oportunidad de hacer
preguntas antes de firmar y se le ha informado que puede hacer preguntas en
cualquier momento.**

Usted ha aceptado participar en este estudio voluntariamente. Al firmar este
consentimiento usted no está cediendo a ninguno de sus derechos legales. No se le
penalizará de ninguna manera ni se le descontinuarán los beneficios por negarse a
participar .

_____

Firma del/de la voluntario/a   FECHA

MAR 0 2 2011

APPROVED

MAR 0 1 2012

Institutional Review Board

APPENDIX D

INFORMED CONSENT (ENGLISH VERSION)

MAR 0 2 2011

INFORMED CONSENT

APPROVED

MAR 0 1 2012

PRINCIPAL INVESTIGATOR:
María de Lourdes Martínez Avilés

TITLE OF PROJECT:
The Individual and Collective Effect of U.S. Colonialism in Puerto Rico and its
Impact on Social Work Education and Practice: A scale construction and
validations.

INTRODUCTION:
You are being asked to participate in a research study. Your participation is voluntary.
Please ask questions if there is anything you do not understand.

This Informed Consent will explain about being a research subject in a study. It is
important that you read this material carefully and then decide if you wish to be a
volunteer.

PURPOSE:
This researcher is conducting a research as a final requirement for a doctoral degree in
social work from the School of Social Work at the University of Texas at Arlington, and
the Universidad Autónoma de Nuevo León, México. This research consists of two
phases, you are asked to participate only on the initial phase which consists on the
validation of some scales.

DURATION:
Your participation will take you approximately 30 to 60 minutes. It will conclude as soon
as you complete the scales.

PROCEDURES:
This research study consist reading and completing with check marks three
questionnaires and one demographics documents.

POSSIBLE BENEFITS:
The possible benefits of your participation are: 1) the satisfaction of being a contributor
for the enrichment of the social work profession and also 2) on the development of
standardizes instruments specifically designed or adjusted for the Puerto Rican
population.

Results from this research will be reported on the Theses Dissertation Defense at the
University of Texas at Arlington, and the Universidad Autónoma de Nuevo León.

COMPENSATION:
There is no compensation for the participation in this study.

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POSSIBLE RISKS/DISCOMFORTS:
There are no foreseeable risks of discomfort associated with this study.

ALTERNATIVE PROCEDURES/TREATMENTS:
There is no alternative procedures/treatments available to you if you elect not to participate in this research project.

WITHDRAWAL FROM THE STUDY:
Participation in this research is strictly voluntary. You may refuse to participate or Review Board any time, with no retaliation against you.

NUMBER OF PARTICIPANTS: We expect 320 of participants to enroll in this study.

CONFIDENTIALITY:
Every attempt will be made to see that your study results are kept confidential. A copy of the records from this study will be stored for three years in a locked filing cabinet in the researcher's home office. The results of this study may be published and/or presented at meetings without naming you as a subject. Although your rights and privacy will be maintained, the UTA IRB, and personnel particular to this research (the UTA/UANL School of Social Work researcher's committee) have access to the study records. Your records will be kept completely confidential according to current IRB requirements.

If in the unlikely event it becomes necessary for the Institutional Review Board to review your research records, then The University of Texas at Arlington will protect the confidentiality of those records to the extent permitted by law. Your research records will not be released without your consent unless required by law or a court order. The data resulting from your participation may be made available to other researchers in the future for research purposes not detailed within this consent form. In these cases, the data will contain no identifying information that could associate you with it, or with your participation in any study.

CONTACT FOR QUESTIONS:
Questions about this research or your rights as a research subject may be directed to Maria de Lourdes Martinez Avilés at (787) 955-7171. You may contact the chairperson of the UT Arlington Institutional Review Board at (817) 272-3723 in the event of a research-related injury to the subject.

CONSENT:
Signatures:
As a representative of this study, I have explained the purpose, the procedures, the benefits, and the risks that are involved in this research study:

_____

Signature and printed name of principal investigator or person obtaining consent   Date

13 October 2007

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By signing below, you confirm that you have read or had this document read to you.
You have been informed about this study's purpose, procedures, possible benefits and risks, and you have received a copy of this form. You have been given the opportunity to ask questions before you sign, and you have been told that you can ask other questions at any time

You voluntarily agree to participate in this study. By signing this form, you are not waiving any of your legal rights. Refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled, and the you may discontinue participation at any time without penalty or loss of benefits, to which you are otherwise entitled.

SIGNATURE OF VOLUNTEER   DATE

MAR 0 2 2011

APPROVED   APPROVED
MAR   MAR 0 1 2012
Institutional Review Board   Institutional Review Board

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CSPR'S ORIGINAL VERSION WITH 90 ITEMS,

HYPOTHETICAL FACTORS, AND

NEGATIVELY WORDED ITEMS

Instructions: Below are a series of assumptions related to Puerto Rico, the Puerto Ricans and their relationship with the United States. Note that when using the term American in any of the assumptions we refer exclusively to Americans from the United States. To the right of each premise will find a scale from 5 to 1. Please carefully read each premise and express your opinion using the scale. The highest number in the scale, number 5, indicates that you strongly agree with the premise, while the smallest, and number 1 means you strongly disagree. While, number 3 indicates that you are undecided or do not know enough to give an opinion. We are not expecting a specific answer, what counts is your opinion.

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
Factor 1 - Colonial Awareness					
1. English was for more than forty years the official language of teaching in the public school system of Puerto Rico.					
2. * Puerto Rico is a sovereign country.					
3. In the beginning the United States established in Puerto Rico a military government.					
4. I know what colonialism is.					
5. United States took over Puerto Rico using its armed forces.					
6. I know the history of Puerto Rico.					
7. The United Nations (UN) has established the decolonization process for a country.					
8. The U.S. wanted to take over Puerto Rico before the Spanish-American War (1898).					
9. I can recognize illustrious (distinguished) people of Puerto Rico and their contribution.					
10. The hearings and proceedings are always conducted in English in the US Federal Court in Puerto Rico.					
11. The United States government controls mass communication (radio / television / telephone) in Puerto Rico.					
12. The government of Puerto Rico regulates the entry of foreigners to Puerto Rico.					
13. * The U.S. citizenship granted to Puerto Ricans living in Puerto Rico the same rights as other American citizens.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
14. * Puerto Ricans chose to replace the Spanish government with the American.					
15. Colonialism has been condemned by the United Nations Organization (UNO).					
16. I have the necessary information to decide the political status of Puerto Rico.					
17. I am interested in the issue of colonialism.					
18. * The government of Puerto Rico has the power to decide on matters related to the currency used in Puerto Rico.					
Factor 2 – Ethnic or Cultural Self-image					
19. I am proud of Puerto Rico as a nation.					
20. * The names in English sound more elegant than they do in Spanish.					
21. * I prefer Santa Claus over the Magi (Three Kings)					
22. It bothers me when a negative image of Puerto Ricans is represented.					
23. * When I speak Spanish, there are words or phrases that I prefer to say in English, even when I know how to say them in Spanish.					
24. I feel pride for Puerto Rican traditions.					
25. * I want to look more like an American: tall, thin, with a regular nose, straight hair, light colored eyes and hair, as well as have fair skin.					
26. * I believe that the names for a business should not be in Spanish.					
27. * Americans are superior to Puerto Ricans.					
28. I make every effort to preserve Puerto Rican traditions.					
29. * The celebration of American traditions and festivals such as Easter, the 4th of July, Halloween, Thanksgiving and Santa Claus, denotes our cultural progress.					
30. * Puerto Ricans are lazy.					
31. I prefer our music (jíbara, salsa, bomba, plena, etc.) to American music.					
32. * I consider myself American first and then Puerto Rican.					
33. * The intellectual capacity of Americans is admirable; we have much to learn from them.					
34. * English is a superior language to Spanish.					
35. I want to preserve my traditional Puerto Rican way of being.					
36. I only consider myself a Puerto Rican.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
37. Puerto Ricans are hospitable.					
38. * When I am told that the "plantain stain" shows I feel that I am being insulted.					
39. * Watching American TV programs even if it they are in Spanish is a good thing for Puerto Rican children and youth because it teaches them a more sophisticated lifestyle.					
40. * Puerto Ricans like to obtain things easily (effortlessly).					
41. * I care a lot about learning English even if I am not fluent in Spanish.					
42. Puerto Ricans are more corrupt than the Americans.					
43. * I speak English whenever I can even though my native language is Spanish.					
44. * The American lifestyle is more sophisticated than that of Puerto Ricans.					
45. * Puerto Ricans themselves are responsible for the negative images that are portrait about them.					
46. * Saying professional or technical terms in English, when we speak in Spanish make a better impression.					
47. Puerto Ricans are opportunist.					
48. * There are situations that make me feel embarrassed to be Puerto Rican.					
49. * We as Puerto Ricans do things better when we are led or supervised by the Americans.					
50. Puerto Ricans are honest people.					
51. * I trust more the FBI than the Puerto Rican police.					
52. I only use the English language for work or for educational matters.					
53. * There are few things about Puerto Rican of which I can feel pride.					
Factor 3 – Idea of Collective Wellbeing					
54. * Puerto Ricans cannot survive without federal aid.					
55. * If Puerto Ricans chose to become independent from the United States the relations between the two countries would cease.					
56. * Puerto Rico does not have enough resources to become an independent country.					
57. It is unnecessary to make a decision about the political status of Puerto Rico.					
58. In the same manner that George					

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	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
Washington is remembered in the United States so should Betances, Albizu, and other fighters for the independence of Puerto Rico.					
59. * We will die of hunger if we separate from the United States.					
60. I like to get involved in situations that affect my community.					
61. Pedro Albizu Campos, Lolita Lebrón and Filiberto Ojeda Ríos and other fighters for independence are national heroes of Puerto Rico.					
62. The celebration of the Cry of Lares (*Grito de Lares*) should be as important for Puerto Ricans as the celebration of the 4th of July for Americans.					
63. I get involved in the issues of the country and do my best to improve them.					
64. The school should attach importance to developing awareness of the illustrious (notable) people of our country.					
65. * Puerto Rico is so small that it cannot manage on its own.					
66. * It is unnecessary to discuss the issue of colonialism in a country like Puerto Rico.					
67. * Puerto Rico's political relationship with the United States allows us to enjoy "the best of both worlds."					
68. * Puerto Ricans are lucky because by being part of the United States we are in a better position than any other country in Latin America or in the Third World.					
69. School should discuss the social issues of the country.					
70. * The establishment of the Commonwealth (Free Associated State, ELA, for its Spanish acronym) was able to eliminate the colonial status of Puerto Rico.					
71. * To trade exclusively with the United States offers a great advantage to Puerto Rico.					
72. * I live my own life; I do not pay any attention to what happens in the country.					
73. * The intervention of the United States in Puerto Rico has not changed Puerto Rican culture.					
74. The history of Puerto Rico should be a very important subject in the education of Puerto Rico.					
75. * Development in Puerto Rico has brought a higher quality of life.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
Factor 4 – Colonial Debt					
76. * The refined lifestyle we have achieved is indicative of the progress the United States brought to Puerto Rico.					
77. The people of Puerto Rico have sacrificed much in return for federal funds.					
78. * It has been an advantage that the Americans took an interest in Puerto Rico.					
79. * Poverty was eliminated in Puerto Rico thanks to the Americans.					
80. * The mistakes made by the United States in Puerto Rico are a small price to pay in return for their acts of kindness they brought to us.					
81. * The Americans came to Puerto Rico to help and rescue us from the abuses of the Spaniards.					
82. * The pollution created by the United States Navy in Vieques is a small thing compared with the benefits that we receive from the United States.					
83. The dependence on the federal programs and funds are an obstacle for a real social development in Puerto Rico.					
84. * It is an advantage that we can use the American dollars.					
85. The Puerto Rican people have paid off with interest each dollar invested in Puerto Rico by the United States government.					
86. * The Americans demonstrate how charitable they are when they bring us their aid, for example: the scholarships, food stamps, and all the other funds that they give us.					
87. * We should do everything in our power to look good before the Americans.					
88. * It is a privilege that we can use the American passport.					
89. Progress in Puerto Rico is due to the Puerto Ricans own efforts.					
90. * We are ungrateful if we do not acknowledge all that the United States has done for Puerto Rico.					

APPENDIX F

CSPR'S AFTER THEORETICAL ITEMS EVALUATION

This table shows the 35 items deleted after being evaluated for the characteristics of a good fit item suggested in summated scale construction theory. The items dropped and the rationale for its deletion is included at the end of the table.

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
1. F					
2. F.					
3. F					
4. I know what colonialism is.					
5. F					
6. I know the history of Puerto Rico.					
7. F					
8. F					
9. I can recognize illustrious (distinguished) people of Puerto Rico and their contribution.					
10. F					
11. F					
12. F					
13. The U.S. citizenship granted to Puerto Ricans living in Puerto Rico the same rights as other American citizens.					
14. F					
15. F					
16. I have the necessary information to decide the political status of Puerto Rico.					
17. I am interested in the issue of colonialism.					
18. F					
19. I am proud of Puerto Rico as a nation.					
20. Names in English sound more elegant than they do in Spanish.					
21. ES.					
22. ES					
23. When I speak Spanish, there are words or phrases that I prefer to say in English, even when I know how to say them in Spanish.					
24. ES					
25. ES					
26. MN					
27. ES					
28. ES					
29. The celebration of American traditions and festivals such as Easter, the 4th of July, Halloween, Thanksgiving and Santa Claus, denotes our cultural progress.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
30. Puerto Ricans are lazy.					
31. I prefer our music (jíbara, salsa, bomba, plena, etc.) to American music.					
32. A					
33. DB					
34. ES					
35. ES					
36. A					
37. Puerto Ricans are hospitable.					
38. ES					
39. DB					
40. Puerto Ricans like to obtain things easily (effortlessly).					
41. I care a lot about learning English even if I am not fluent in Spanish.					
42. Puerto Ricans are more corrupt than the Americans.					
43. I speak English whenever I can even though my native language is Spanish.					
44. The American lifestyle is more sophisticated than that of Puerto Ricans.					
45. Puerto Ricans themselves are responsible for the negative images that are portrait about them.					
46. Saying professional or technical terms in English, when we speak in Spanish make a better impression.					
47. Puerto Ricans are opportunist.					
48. There are situations that make me feel embarrassed to be Puerto Rican.					
49. We as Puerto Ricans do things better when we are led or supervised by the Americans.					
50. Puerto Ricans are honest people.					
51. I trust more the FBI than the Puerto Rican police.					
52. I only use the English language for work or for educational matters.					
53. ES					
54. Puerto Ricans cannot survive without federal aid.					
55. If Puerto Ricans chose to become independent from the United States the relations between the two countries would cease.					
56. Puerto Rico does not have enough resources to become an independent country.					
57. It is unnecessary to make a decision about the political status of Puerto Rico.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
58. In the same manner that George Washington is remembered in the United States so should Betances, Albizu, and other fighters for the independence of Puerto Rico.					
59. We will die of hunger if we separate from the United States.					
60. I like to get involved in situations that affect my community.					
61. Pedro Albizu Campos, Lolita Lebrón and Filiberto Ojeda Ríos and other fighters for independence are national heroes of Puerto Rico.					
62. The celebration of the Cry of Lares (*Grito de Lares*) should be as important for Puerto Ricans as the celebration of the 4th of July for Americans.					
63. I get involved in the issues of the country and do my best to improve them.					
64. ES					
65. Puerto Rico is so small that it cannot manage on its own.					
66. It is unnecessary to discuss the issue of colonialism in a country like Puerto Rico.					
67. Puerto Rico's political relationship with the United States allows us to enjoy "the best of both worlds."					
68. Puerto Ricans are lucky because by being part of the United States we are in a better position than any other country in Latin America or in the Third World.					
69. ES					
70. The establishment of the Commonwealth (Free Associated State, ELA, for its Spanish acronym) was able to eliminate the colonial status of Puerto Rico.					
71. To trade exclusively with the United States offers a great advantage to Puerto Rico.					
72. I live my own life; I do not pay any attention to what happens in the country.					
73. The intervention of the United States in Puerto Rico has not changed Puerto Rican culture.					
74. ES					
75. Development in Puerto Rico has brought a higher quality of life.					

	Strongly agree 5	Agree 4	Undecided or do not know 3	Disagree 2	Strongly disagree 1
76. The refined lifestyle we have achieved is indicative of the progress the United States brought to Puerto Rico.					
77. The people of Puerto Rico have sacrificed much in return for federal funds.					
78. It has been an advantage that the Americans took an interest in Puerto Rico.					
79. Poverty was eliminated in Puerto Rico thanks to the Americans.					
80. The mistakes made by the United States in Puerto Rico are a small price to pay in return for their acts of kindness they brought to us.					
81. The Americans came to Puerto Rico to help and rescue us from the abuses of the Spaniards.					
82. ES					
83. The dependence on the federal programs and funds are an obstacle for a real social development in Puerto Rico.					
84. It is an advantage that we can use the American dollars.					
85. A					
86. The Americans demonstrate how charitable they are when they bring us their aid, for example: the scholarships, food stamps, and all the other funds that they give us.					
87. We should do everything in our power to look good before the Americans.					
88. It is a privilege that we can use the American passport.					
89. Progress in Puerto Rico is due to the Puerto Ricans own efforts.					
90. We are ungrateful if we do not acknowledge all that the United States has done for Puerto Rico.					

Rationale for dropping items:

F – Item is a fact

> Q1 – English was for more than forty years the official language of teaching in the public school system of Puerto Rico.
> Q2 – Puerto Rico is a sovereign country
> Q3 – In the beginning the United States established in Puerto Rico a military government.
> Q5 – United States took over Puerto Rico using its armed forces.
> Q7 – The United Nations (UN) has established the decolonization process for a country.
> Q8 – The U.S. wanted to take over Puerto Rico before the Spanish-American War (1898).

Q10 – The hearings and proceedings are always conducted in English in the US Federal Court in Puerto Rico.

Q11 – The United States government controls mass communication (radio / television / telephone) in Puerto Rico.

Q12 – The government of Puerto Rico regulates the entry of foreigners to Puerto Rico.

Q14 – Puerto Ricans chose to replace the Spanish government with the American government.

Q15 – Colonialism has been condemned by the United Nations Organization (UNO).

Q18 – The government of Puerto Rico has the power to decide on matters related to the currency used in Puerto Rico.

ES – Extreme Statement (either too mild or too strong). Most people will agree or disagree.

Q20 – Names in English sound more elegant than they do in Spanish

Q21 – I prefer Santa Claus over the Magi (Three Kings)

Q22 – It bothers me when a negative image of Puerto Ricans is represented.

Q24 – I feel pride for Puerto Rican traditions.

Q25 – I want to look more like an American: tall, thin, with a regular nose, straight hair, light colored eyes and hair, as well as have fair skin.

Q27 – Americans are superior to Puerto Ricans.

Q28 – I make every effort to preserve Puerto Rican traditions.

Q34 – English is a superior language to Spanish.

Q35 – I want to preserve my traditional Puerto Rican way of being.

Q38 – When I am told that the "plantain stain" shows on me, I feel that I am being insulted. [Refers to the details in the speech and gestures that identifies a member of the Puerto Rican nation]

Q53 – There are few things about Puerto Rican of which I can feel pride.

Q64 – The school should attach importance to developing awareness of the illustrious (notable) people of our country.

Q69 – School should discuss the social issues of the country.

Q74 – The history of Puerto Rico should be a very important subject in the education of Puerto Rico.

Q82 – The pollution created by the United States Navy in Vieques is a small thing compared with the benefits that we receive from the United States.

A – Ambiguous (either not clear, too lengthy or has difficult reading level)

Q32 – I consider myself American first and then Puerto Rican.

Q36 – I only consider myself a Puerto Rican.

Q85 – The Puerto Rican people have paid off with interest each dollar invested in Puerto Rico by the United States government.

MN – Multiple Negative (item written including *not* or similar quotation)

Q26 – I believe that the names for a business should not be in Spanish.

DB – Double Barreled (convey two or more ideas, so that an endorsement of the item might refer to either or both ideas)

Q33 – The intellectual capacity of Americans is admirable; we have much to learn from them.

Q39 – Watching American TV programs even if it they are in Spanish is a good thing for Puerto Rican children and youth because it teaches them a more sophisticated lifestyle.

90 Original items – 35 items dropped after theoretical/content evaluation = 55 items for statistical items analysis
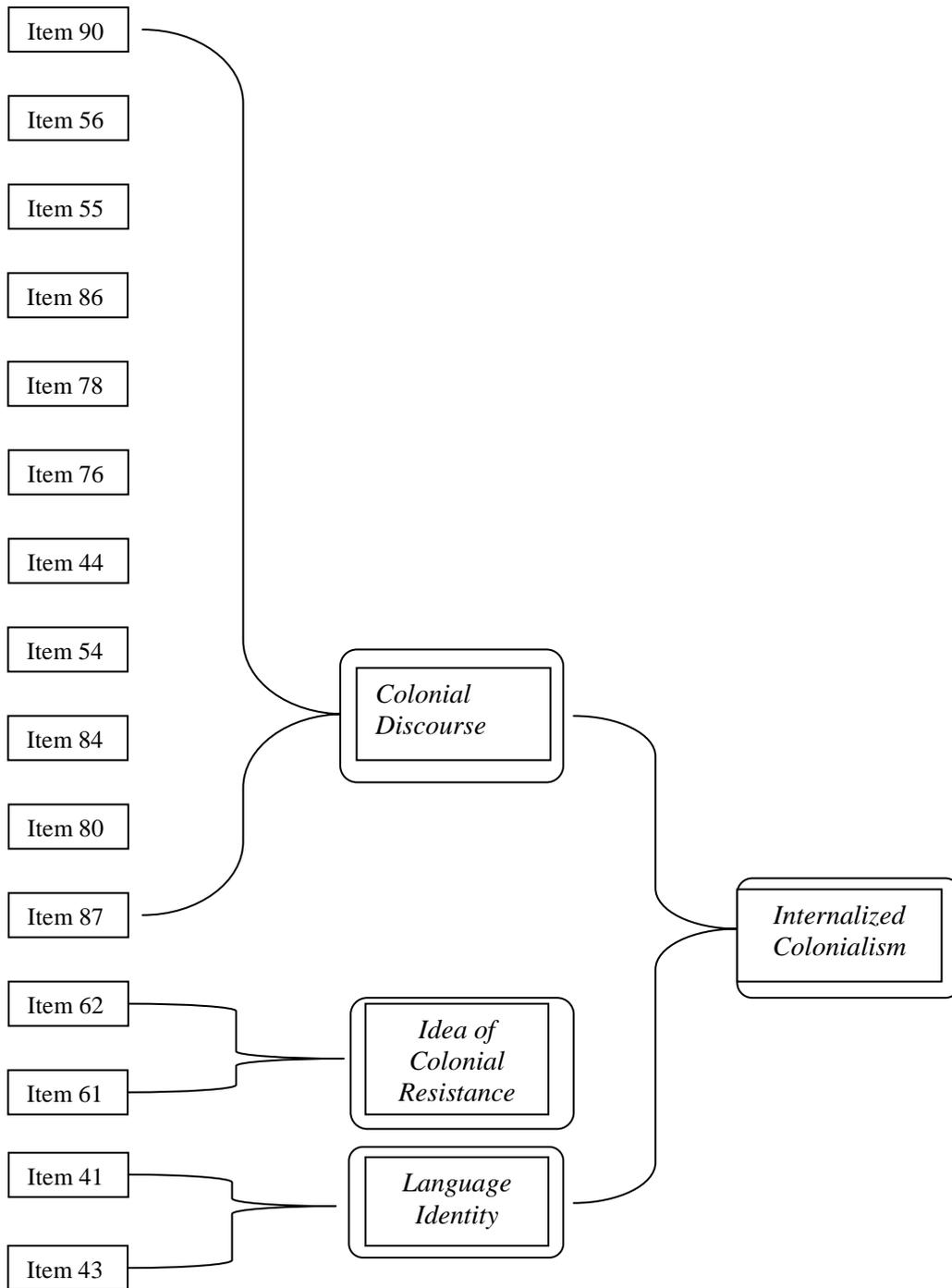
APPENDIX G

ITEMS DROPPED FROM THE CSPR DUE TO HIGH KURTOSIS

	Q's Number and Assertion	Kurtosis
Q4	I know what colonialism is.	1.773
Q6	I know the history of Puerto Rico.	2.138
Q9	I can recognize illustrious (distinguished) people of Puerto Rico and their contribution.	1.921
Q13	The U.S. citizenship granted to Puerto Ricans living in Puerto Rico the same rights as other American citizens.	1.183
Q19	I am proud of Puerto Rico as a nation.	2.209
Q23	When I speak Spanish, there are words or phrases that I prefer to say in English, even when I know how to say them in Spanish.	1.235
Q30	Puerto Ricans are lazy.	1.173
Q40	Puerto Ricans like to obtain things easily (effortlessly).	1.248
Q42	Puerto Ricans are more corrupt than the Americans.	2.043
Q45	Puerto Ricans themselves are responsible for the negative images that are portrait about them.	1.285
Q49	We as Puerto Ricans do things better when we are led or supervised by the Americans.	2.727
Q50	Puerto Ricans are honest people.	1.493
Q52	I only use the English language for work or for educational matters.	1.338
Q58	In the same manner that George Washington is remembered in the United States so should Betances, Albizu, and other fighters for the independence of Puerto Rico.	3.306
Q59	We will die of hunger if we separate from the United States.	1.762
Q60	I like to get involved in situations that affect my community.	1.211
Q65	Puerto Rico is so small that it cannot manage on its own.	5.234
Q66	It is unnecessary to discuss the issue of colonialism in a country like Puerto Rico.	1.694
Q67	Puerto Rico's political relationship with the United States allows us to enjoy "the best of both worlds."	1.281
Q68	Puerto Ricans are lucky because by being part of the United States we are in a better position than any other country in Latin America or in the Third World.	1.093
Q72	I live my own life; I do not pay any attention to what happens in the country.	3.635
Q75	Development in Puerto Rico has brought a higher quality of life.	1.096
Q81	The Americans came to Puerto Rico to help and rescue us from the abuses of the Spaniards.	1.148
Q88	It is a privilege that we can use the American passport.	1.329

CSPR'S BEST-FIT MODEL

Item 90

Item 56

Item 55

Item 86

Item 78

Item 76

Item 44

Item 54

Colonial Discourse

Item 84

Item 80

Item 87

Internalized Colonialism

Item 62

Item 61

Idea of Colonial Resistance

Item 41

Item 43

Language Identity

APPENDIX I

ITEM NUMBERS COMPARISON,

NEW CSPR AND TESTED CSPR

New Colonialism Scale for Puerto Ricans	Item numbers in tested scale
1. We are ungrateful if we do not acknowledge all that the United States has done for Puerto Rico.	90
2. Puerto Rico does not have enough resources to become an independent country.	56
3. If Puerto Ricans chose to become independent from the United States the relations between the two countries would cease.	55
4. The Americans demonstrate how charitable they are when they bring us their aid, for example: the scholarships, food stamps, and all the other funds that they give us.	86
5. It has been an advantage that the Americans took an interest in Puerto Rico.	78
6. The refined lifestyle we have achieved is indicative of the progress the United States brought to Puerto Rico.	76
7. The American lifestyle is more sophisticated than that of Puerto Ricans.	44
8. Puerto Ricans cannot survive without federal aid	54
9. It is an advantage that we can use the American dollars.	84
10. The mistakes made by the United States in Puerto Rico are a small price to pay in return for their acts of kindness they brought to us.	80
11. We should do everything in our power to look good before the Americans.	87
12. The celebration of the Cry of Lares (*Grito de Lares*) should be as important for Puerto Ricans as the celebration of the 4th of July for Americans.	62
13. Pedro Albizu Campos, Lolita Lebrón and Filiberto Ojeda Ríos and other fighters for independence are national heroes of Puerto Rico.	61
14. I care a lot about learning English even if I am not fluent in Spanish.	41
15. I speak English whenever I can even though my native language is Spanish.	43

ESCALA SOBRE COLONIALISMO PARA PUERTORRIQUEÑOS (ECP)

Instrucciones: A continuación encontrará una serie de premisas relacionadas con Puerto Rico, los puertorriqueños y su relación con Estados Unidos. Fíjese que cuando se usa el término americanos en alguna de las premisas nos referimos exclusivamente a los estadounidenses. A la derecha de cada premisa encontrará una escala que va del 5 al 1. Por favor, lea cuidadosamente cada premisa y exprese su opinión utilizando la escala. El número mayor en la escala, número 5, indica que usted está Muy de Acuerdo con la premisa, mientras que el número menor, número 1, indica que usted está Muy en Desacuerdo. Mientras tanto, el número 3 indica Indecisión o que no tiene criterios para opinar. No esperamos ninguna respuesta en particular; su opinión es lo que cuenta.

	Muy de Acuerdo 5	De Acuerdo 4	Indeciso o no sé 3	En Desacuerdo 2	Muy en Desacuerdo 1
1. Somos malagradecidos si no reconocemos todo lo que ha hecho Estados Unidos por Puerto Rico					
2. Puerto Rico no tiene recursos suficientes para ser independiente.					
3. Si los puertorriqueños decidieran independizarse de los Estados Unidos se acabarían las relaciones entre ambos países.					
4. Los americanos demuestran lo caritativos que son al brindarnos ayudas tales como: las becas, los "cupones de alimento" y todos los demás fondos que nos dan.					
5. Ha sido una ventaja que los americanos se hayan interesado en Puerto Rico.					
6. El refinado estilo de vida que hemos alcanzado es muestra del progreso traído por los Estados Unidos a Puerto Rico.					
7. El estilo de vida americano es más sofisticado que el puertorriqueño.					
8. Los puertorriqueños no podríamos sobrevivir sin las ayudas federales.					
9. Es una ventaja que podamos usar los dólares americanos					

10. Los errores que hayan cometido los Estados Unidos en Puerto Rico es un pequeño precio a pagar a cambio de todas las bondades que nos han traído.					
11. Debemos hacer todo lo posible por lucir bien ante los americanos.					
12. La celebración del Grito de Lares debería ser tan importante para los puertorriqueños como la celebración del 4 de julio para los americanos.					
13. Pedro Albizu Campos, Lolita Lebrón y Filiberto Ojeda Ríos y otros luchadores por la independencia son héroes nacionales de Puerto Rico.					
14. Me importa mucho saber inglés aunque no domine muy bien el español.					
15. Siempre que puedo hablo en inglés aunque mi idioma					

APPENDIX K

SCORING SHEET FOR THE COLONIALISM SCALE

FOR PUERTO RICANS

The three final factors for the CSPR are following:

- ❖ Items   1 – 11 = Factor 1 - *Colonial Discourse*

- ❖ Items 12 – 13 = Factor 2 - Factor 2 – *Idea of Colonial Resistance*

- ❖ Items 14 – 15 = Factor 3 – *Language Identity*

Items that were worded negatively should be recoded prior to computing final scores. So, first reverse scores for answers to items 1 – 11, 14, and 15 so that their values are as follows: (5 = 1), (4 = 2), (3 = 3), (2 = 4), (1 = 5). Items 12 and 13 remain not recoded. For these two items values will be the following: (5=5), (4=4), 3=3), (2=2) and (1=1).

After items are recoded, add the scores for the fifteen items. Lower score possible is 15, and the higher is 75. Higher scores mean lower internalized colonialism; consequently, lower scores means higher internalized colonialism.

The final scoring levels are the following:

- ❖ 15 to 34 points = High level of colonialism

- ❖ 35 to 54 points = Moderate level of colonialism

- ❖ 55 to 75 points = Low level of colonialism

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