METHODOLOGICAL GUIDELINES FOR THE POPULAR UNIVERSITY OF SOCIAL MOVEMENTS (UPMS)

NOTE: The methodological guidelines gather together the contributions of all UPMS participants ever since the idea was first launched at the 2003 World Social Forum. It is particularly indebted to the contribution both of the organizations integrating the technical secretariat and of all those participating in the UPMS workshops that took place in Córdoba (Argentina), Medellín (Colombia), Belo Horizonte (Brazil), Porto Alegre (Brazil), and Aldeia Velha - Casimiro de Abreu (Brazil) (under the 2012 Peoples Summit), as well as of all the participants in the meetings on the UPMS carried out in Caracas (Venezuela), Roma (Italy), Utrecht (The Netherlands), Mumbai (India), Amsterdam (The Netherlands), Nairobi (Kenya), Dakar (Senegal). It was prepared by the working groups created in the 2012 Thematic Social Forum, namely the Coordinating Committee ("Panel of 28 January 2012") and the Charter and Methodology Committee. This version includes amendments discussed at the UPMS meeting held in Lima in 2014, and subsequently ratified in a meeting in Lisbon in 2015.
****

1) A BRIEF HISTORY OF THE UPMS

During the course of the development of the World Social Forum (WSF), some social movement organisations, NGOs, trade unions and intellectuals concluded that *it is not possible to achieve social justice without global cognitive justice.* Within this context, the idea of founding the UPMS began to take shape and was consolidated in subsequent Forum events. During the 2003 World Social Forum the *Popular University of Social Movements* (UPMS) for global cognitive democracy was launched.

The *Popular University of Social Movements* is a space for intercultural training which promotes a process of inter-knowledge and self-education with the dual aim of increasing reciprocal understanding between movements and organisations and making coalitions and joint collective action possible. It is an open meeting place for reflective thinking, the democratic debate of ideas, formulation of proposals, free exchange of experiences and interlinking for effective action, for local, national and global entities and social movements opposed to neoliberalism and the domination of the world by capital and any form of imperialism.

The target public of the UPMS includes activists and leaders of social movements, members of non-governmental organisations and trade unionists, as well as social scientists, researchers and artists committed to progressive social change.

Within this context, the UPMS is based on three premises, namely that:

- through the WSF, it has become clear that the different movements should work together to organise effective collective action;

- this is very often difficult to achieve, due to the fact that there is a great lack of mutual understanding between movements. This is sometimes fuelled by preconceptions (for example, between rural and urban movements, women's and indigenous movements, and workers' and ecological movements);

- when real differences exist, it is important to be able to discuss them in order to discover the extent to which it is possible to work together.

2) CONCEPTS AND METHODOLOGY

Conceptual guidelines:

The UPMS aims to offer a dual learning process. On the one hand, it aims to promote learning amongst community activists and leaders, social movements and organisations, offering them the potential to discuss analytical, theoretical, historical and comparative frameworks that will enable them to deepen their reflective understanding of their practice – their methods and objectives. On the other hand, it fosters learning amongst social scientists, intellectuals and artists committed to social movements and organisations, providing them with the opportunity and the requirement to direct their studies towards the themes and problems which the movements and organisations consider the most relevant or urgent.

The innovative nature of the UPMS lies in this dual learning. In order to pursue this aim, the UPMS bridges the traditional gap between teaching and learning – based on the distinction between teachers and students – and creates contexts and opportunities for mutual learning. Its starting point is the recognition of mutual ignorance. Its end point is the shared production of knowledges which are as global as the processes of globalisation itself and as diverse as all who are engaged in the struggle against neoliberal globalisation, capitalism, domination and oppression.

The UPMS is not a training school for the cadres or leaders of social organisations and movements. Although the UPMS is clearly directed towards action for social change, it does not aim to provide the types of skills and instruction usually offered by the existing popular universities.

In the light of this perspective, the UPMS aims to:

- deepen mutual understanding between political social movements/organisations;

- create levels of mutual trust between different movements/organisations that will make joint political action possible which involve investing resources and risk-taking on the part of the different movements/organisations concerned.

- plan and promote collective political action based on shared responsibility and respect for the political and cultural identities of the different movements/organisations involved.

Methodological guidelines:

The UPMS functions through a network of interactions directed towards promoting understanding and critical evaluation of the wide range of knowledges and practices pursued by different movements and organisations. It is essentially inter-thematic, achieving this objective by fostering reflection and links amongst different movements such as feminist, workers', indigenous, *quilombola*, student, black, LGBT, and ecological organisations, amongst others.

The key methodology of the UPMS is based on a longstanding tradition of popular education in which the name of Paulo Freire is a well-known reference. It is enhanced by two proposals from Boaventura de Sousa Santos:

- Intercultural and interpolítical translation: recognising the existence of many possible forms of knowledge that need to be made visible so that they can contribute towards constructing hybrid forms of emancipatory knowledge. The proposed translation task involves working on intercultural and political dynamics in order to make not only the multiple forms of resistance to oppression and domination visible but also their underlying aspirations, thus helping to foster dialogue between them.

- The ecology of knowledges: a process of reassessing the diversity of knowledge and practises existing in the world that have been rendered invisible or absent by modern western monocultural knowledge. The ecology of knowledges is an

attitude that transcends the prevailing logic of the production of knowledge and encompasses a pedagogical process for the production of knowledge aimed at mutual enrichment, combining knowledge emerging from struggle and knowledge emerging from committed academic work.

The UPMS is not the invention but the affirmation of a pedagogical process, guided by the principles of Popular Education, which places a central emphasis on popular knowledges in the construction of a alternative political projects, thus acknowledging everyday life and experience as spaces within which the new hegemony is constructed.

On the basis of these precepts, the UPMS encompasses:

- a greater effort to remove the distinction between teachers and students, given that all participants are equal bearers of valid knowledge;

- a binding political commitment, given that it operates amongst politically organised participants who are involved in movements and associations;

- a commitment to promote collective actions in which movements with relatively different agendas can participate (an inter-movement policy).

Methodological procedure

UPMS workshops should offer the potential to exchange knowledge, alternating with periods for discussion, study and reflection[1] as well as leisure periods. It is therefore suggested that workshops last two days on a residential basis, thus meaning that the participants are all accommodated in the same place, have their meals together and share moments of leisure and conviviality.

In each UPMS workshop, the debate and discussion should follow a central theme. The workshops will consist of 30 to 50 participants invited by organisation team and facilitators. As a rule, but allowing for flexibility, one third of the participants will consist of militant intellectuals ("those who take part in and share the social and political project within their field of study") or artists committed to social movements, and two thirds will be activists/leaders of social movements/NGOs. Movements/organisations active in at least three thematic areas of the struggle linked

---

[1] A wide variety of study materials may be used, including oral narratives and documentation presented by movements and organisations, theoretical and analytical texts proposed by militant intellectuals, plays (using, for example, the methodology of the Theatre of the Oppressed proposed by Augusto Boal), etc.

to the central theme must be represented. The objective will be to confront different perspectives associated with the same theme.

It is of the utmost importance that the pedagogical dynamics of UPMS workshops favours horizontal relations between all participants – including facilitators – and be motivated by different, participative methods and other languages common to the movements themselves. In other words, it is important to bring into the pedagogical dynamics both the pupils and the experience daily based knowledge learning and experiences based on everyday practice need to be introduced into the pedagogical dynamics.

However, in order to ensure that UPMS workshops run satisfactorily it is necessary to consider the UPMS methodology in terms of the specific phases that precede, overlap, and follow on the workshops. These phases are all closely connected and relevant. The dynamics of each UPMS will guide how the methodology is appropriated. The methodology should be implemented taking into account the specificities of the workshop, therefore, UPMS moments can be higher or lower than those suggested here.

The first phase is associated with **establishing connections and prior mobilisation** – the period in which potential subjects are identified and their interest in taking part in the process is aroused. These subjects are people interested in taking part in the activities themselves and partner subjects who, in addition to participating in the activities, may also make a material contribution towards making the proposal viable;

Therefore, during the period of time that precedes the workshop, the facilitators should be concerned with two matters:

a) Acquiring the resources to cover the accommodation, meals, transport and logistical expenses for the workshop. In order to acquire resources it will be necessary to outline strategies and, as part of this, it is essential that a plan is produced which explains the purpose of the workshop, its political relevance, the methodological/pedagogical process and a detailed budget proposal.[2]

b) Mobilising the workshop participants. This requires care and a great deal of work, since it involves making peers aware of the event and generating an interest in

---

[2] As part of this process of contacting and negotiating with possible UPMS sponsors it will be necessary to clarify that providing funding does not create the right to coordinate or rule on the methodology and construction of the UPMS. Sponsors will, however, be invited to work with the proponents and facilitators in a collective process of construction.

taking part in the workshop. To this end, it will be necessary to identify the political subjects engaged in dialogue with the central theme and establish certain criteria for choosing the people to invite (in addition to the aforementioned criteria for the composition of workshops), taking distribution by race, gender, age, sexual orientation, location, etc. into consideration, in order to produce a significantly diverse list of participants. The facilitators for each workshop are free to draw up and use their respective selection methods, whilst preserving the transparency of the process and maintaining a balance between the different forms of knowledge.

The second phases corresponds to **running the workshop**. The group of facilitators need to ensure that time is provided beforehand to discuss the methodology in order to channel it into a programme proposal that is the result of a collective process. This is also the time to define how the process of keeping records will take place and who will be responsible for this process – in accordance with the section on "preparing workshops" (below).

Finally, at this point the facilitators need to study texts and records from other workshops carefully – this material can be found on the UPMS site – as well as certain guidelines produced by proponents of the UPMS.

With regard to the recommendation that the workshop should take place over two days, it is proposed that the first day should be reserved for introductions or, in other words, for people to get to know each other better, understand the main points of the different struggles and identify the most relevant and urgent themes that should be debated later. The first moment of the first day should consist of a kind of opening ceremony (an event involving entertainment, integration and reflection, widely used by social movements). Latin-American social movements call this initial moment - "mística".

It is of the utmost importance that some hours are reserved in the evening for socialising and getting to know people – as previously stated, both work and leisure periods are equally important and everyone should participate in both.

The second day should be dedicated to deepening the discussion and to paths for the future or, on other words, defining possible future connections between the movements/associations/organisations present.

Day One

Part 1. *What is the UPMS?*

Facilitators should explain the ideas of the UPMS, clarify how the workshop has been organised to date and, together with the various participants, define an agreement for working and living together during the days devoted to the workshop, particularly since there may be people who do not speak the same language and will need to find a shared means of communication.

In this first session it is important to collectively define which of the participants will be responsible for contributing to the record-keeping process, report and workshop memory. If the "rapporteurs" have been appointed in advance, it is important for them to be introduced to the collective participants at the beginning of the workshop. This will avoid any surprises with regard to note-taking, filming and photography (for further information on record-keeping, see "The Memory"). It is important to ask if someone does not want to be filmed or photographed.

Part 2. *Who are we?*

Each movement/organisation and militant intellectual gives a presentation covering their ideology (posições e ideias), objectives, organisation, and social and political intervention practices. They may also take questions and briefly outline their expectations for the workshop in terms of objectives, reservations, doubts and levels of involvement.

Part 3. *What are our greatest successes? What are our greatest limitations and challenges?*

Each movement should begin by contextualising their struggle in relation to their country or region and should then identify the interventions/campaigns/actions which they consider to have been the most successful and those which failed or were more difficult to accomplish. They should specifically identify the main enemies or opponents of their struggles and their main actual or potential allies.

Regardless of the method used for the reflection it is important that the debate allows the participants to analyse what was identified as successful or limited, the difficulties involved in the process, alternative reasons for the achieved results, identify what could have been done to prevent those difficulties and what are the greatest challenges for the future.

Part 4. *Which are the themes that most urgently need to be debated?*

The previous debate leads to reflections that will highlight the themes that need to be explored in detail. Discussions should be led by facilitators.

It is therefore necessary to identify:

- the themes which emerge;

- the themes that were absent but should, in principle, be considered relevant.

Part 5. *Dinner – Socialising*

Day Two

Part 6. *What unites us and what divides us?*

Bearing in mind the themes defined the day before, a substantial discussion should be held on the differences and similarities identified in the ideologies, organisation and intervention models, practices and discourses of the movements/organisations. This debate may specifically include the following questions (amongst others):

a – What are the main differences and similarities in points of view and contextual perspectives?

b – What are the fundamental differences and language differences? What are the most important concepts that characterise our work and our struggle and why do we prefer them to other alternative concepts?

c – What are the organisational differences and affinities? d – What are the differences and affinities in the models and practices for intervention and activism?

e – Which of the differences in ideology, perspectives and intervention can be surmounted and which cannot?

f – What complementary features can be identified?

g – What experience do we have of collaborating with other movements/ organisations? What is our overall assessment of this?

In order to identify the main similarities and differences, it is suggested that the facilitators organise some sample questions focussing on a specific roadmap that includes detailed questions on the main themes of the workshop and a general roadmap[3] relating to the profile, objectives and general factors affecting the social

---

[3] For example, the general roadmap may include themes/questions such as the ones below, which may be introduced into the debate:
- Is it useful to imagine a post-capitalist society and fight for this or should we focus on creating a more just capitalist society?
- What role does the state play in our struggles? Is it always an enemy or always an ally, or in what circumstances can it be one or the other?
- What is our position regarding the market? Is it always an enemy or always an ally, or in what circumstances can it be one or the other?

struggles. This is a proposed method for initiating a debate that may or may not be used, depending on the time available on the second day of the workshop, although it is worth stressing the importance of the facilitators drawing up a list of certain questions for discussion, in order to organise a line of reflection.

Part 7. *What can we learn from each other and do together?*

Moving on to the assessment process, the participants identify the most important things they have learned, both in terms of the political, epistemological, organisational and intervention options that should be avoided as they are ambiguous, and the more viable options that should be adopted or taken into consideration in order to improve the organisation and practise of their respective movements/organisations.

In this phase of the meeting the participants engage in an open dialogue, imagining and proposing actions, interventions, struggles and campaigns that may be carried out in conjunction with all the other movements/organisations or with some of them. From amongst these proposals for joint action, they may select the ones which reflect the greatest consensus in ideological, organisational and practical terms.

Part 8. *Who is missing?*

Participants identify the movements/organisations and intellectuals who are absent and whose contributions may be important in terms of carrying out the collective actions that have been decided. Any absences are noted so that this can be remedied in future workshops.

Part 9. *What are our deliberations? How will we achieve this? What is our opinion on the future of the UPMS?*

At this point it is necessary to dedicate some final time to organising future paths and contributing to the continuity of the UPMS.

Part 10. *Closing ceremony*

- Are there any priorities or inequalities in the struggles against economic inequality, sexual, ethnic and racial discrimination, destruction of the environment, and cultural oppression?
- Is legal or illegal direct action more, or less, effective than institutional action? In what circumstances would it make sense to use the courts to uphold claims?
- Are local and national struggles more, or less, important than global struggles? What are the obstacles to international and continental alliances?
- What type of relations should there be between movements/organisations in the South and movements/organisations in the North? To what extent are alliances possible? How should we deal with the problem of financial dependence?
- What is the importance of the World Social Forum? What is its future?
- How can we fight the criminalisation of social protest that is intensifying in different countries, sometimes using the new generation of anti-terrorist legislation?
- How can we use the media?

Some considerations on preparing UPMS workshops:

- Visit the place where the workshop will be held and prepare the room to ensure easy face-to-face interaction for all participants. It is a good idea to provide simple refreshments in the breaks;

- Check the conditions for playing videos during sessions.

- Identify the team responsible for the record-keeping during workshop. The products should be approved by all participants before they are linked to the UPMS page. Discuss the terms of the products, what form they should take and the time available for producing them.

- Think of a suggestion for socialising and getting together on the first day and get approval for this idea at the beginning of the workshop – as part of the agreement for working and living together.

- Identify the people who may take responsibility for the reception, entertainment and ceremony.

- If the participants speak different languages, identify people who may be available to help provide sequential translation.

- It will be necessary to organise an attendance sheet that should be signed by participants on each day of the workshop, in order to maintain communications between participants.

- It will be necessary to provide a certificate stating the date, place, hours worked and discussion theme of the workshop. The certificate must be signed by the proponents, facilitators and organisers of the workshop.

4) Involvement in the network and the continuity of the UPMS:

The final phase relates to the **post-workshop period**, or process of reporting and organising the workshop records. In this phase, the facilitators need to organise themselves in order to create mechanisms for reporting back to UPMS supporters, and dedicate some time to organising and finalising the record-keeping product(s).

All these digital documents, from the plan for fundraising and interlocutors to the products of the record-keeping, should be sent to the group responsible for the webpage at upms.mail@gmail.com , so that the most important results can be made available on the site. All the materials (documents, photographs, film, notes taken

during workshops) will be stored in the UPMS archives which are housed in the Memorial do Fórum Social Mundial in Porto Alegre/Rio Grande do Sul/Brazil[4].

The role of the facilitators:

- Facilitators need to ensure that speaking time is evenly distributed. Since intellectuals-militants are, as a rule, more accustomed to speaking or find it easier to express themselves, care must be taken to ensure that everyone has the same right and opportunity to speak. In any case, it should be emphasised that listening is an important aspect of dialogue.

- Take care to identify the themes that are most important to the participants or the ones which they would most like to discuss. Using a sociology of absences[5], the facilitators, in collaboration with the various participants, may also identify potentially productive themes which for some reason do not surface in debates.

The memory:

- The record-keeping and contents of the memory include note-taking, audio recordings, photography, filming, workshop materials stored as posters and other forms of language.

- It is suggested that even if the proponents of the workshop contract professionals for filming, it is useful for one of the rapporteurs to be responsible for making audio-visual recordings of the workshop using a simple digital camera (with average or low resolution to avoid very large archives). It is important that all the workshop procedures are filmed so that the position of the participants, the methodology and methods used, any points of conflict or tension and, effectively, all the combined elements leading to the reflexive process at the end of the workshop, can be stored in the UPMS memory.

---

[4] The WSF and UPMS areas are located in the basement of the **Memorial do Rio Grande do Sul** building in Rua Sete de Setembro, 1020 - Praça da Alfândega - Centro Histórico - Porto Alegre - RS - CEP: 90010-191.

[5] The sociology of absences aims to demonstrate that what does not exist is, in reality, actively produced as non-existent, i.e. as a non-credible alternative to what exists. The objective of the sociology of absences is to transform absences into presences. The non-existent is produced whenever a particular entity is disqualified and made invisible, unintelligible or disposable in some irreversible way. What unites the different principles underlying the production of non-existence is the fact that they are all manifestations of a monocultural rationality.

- The final report is an important document for everyone involved in the workshop and it is important that it should be detailed, serving as a strategic "tool" for social movements and as a document for the UPMS archives and memory. However, as the details in the report may expose social movements and their representatives, it is suggested that two separate and directly related documents should be produced:

1) A complete and detailed report (in digital format), for the workshop participants and the UPMS' memory archives;

2) A summary of the report, containing only the names of the participants, programme, photos and main results, to be displayed on the site and made available to all.

UPMS

ANNEX 1 - Model register

REGISTER OF PARTICIPANTS AT (NAME OF WORKSHOP) UPMS WORKSHOP
(Place)

Date:
Session:

	NAME	ENTITY/ MOVEMENT	COUN TRY	CPF/ PASSPORT NO.	E-mail	Signature
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						

ANNEX 2 – Model certificate

UNIVERSIDADE POPULAR DOS MOVIMENTOS SOCIAIS

I

CERTIFICADO

Certificamos que _____, participou da Oficina *tema que configura a oficina* da Universidade Popular dos Movimentos Sociais realizada nos dias ?? e ?? de mês de ano na Local da Oficina na Cidade ????????, no âmbito do evento em que está inscrita a oficina (se for o caso).

Cidade, dia de mês de ano.

Assinatura Comissão Ampliada UPMS   Assinatura do proponente da oficina   Assinatura Coordenafor/facilitador

REALIZAÇÃO E APOIO (abaixo logo dos apoioadores, financiadores e realizadores a exemplo do Alice)