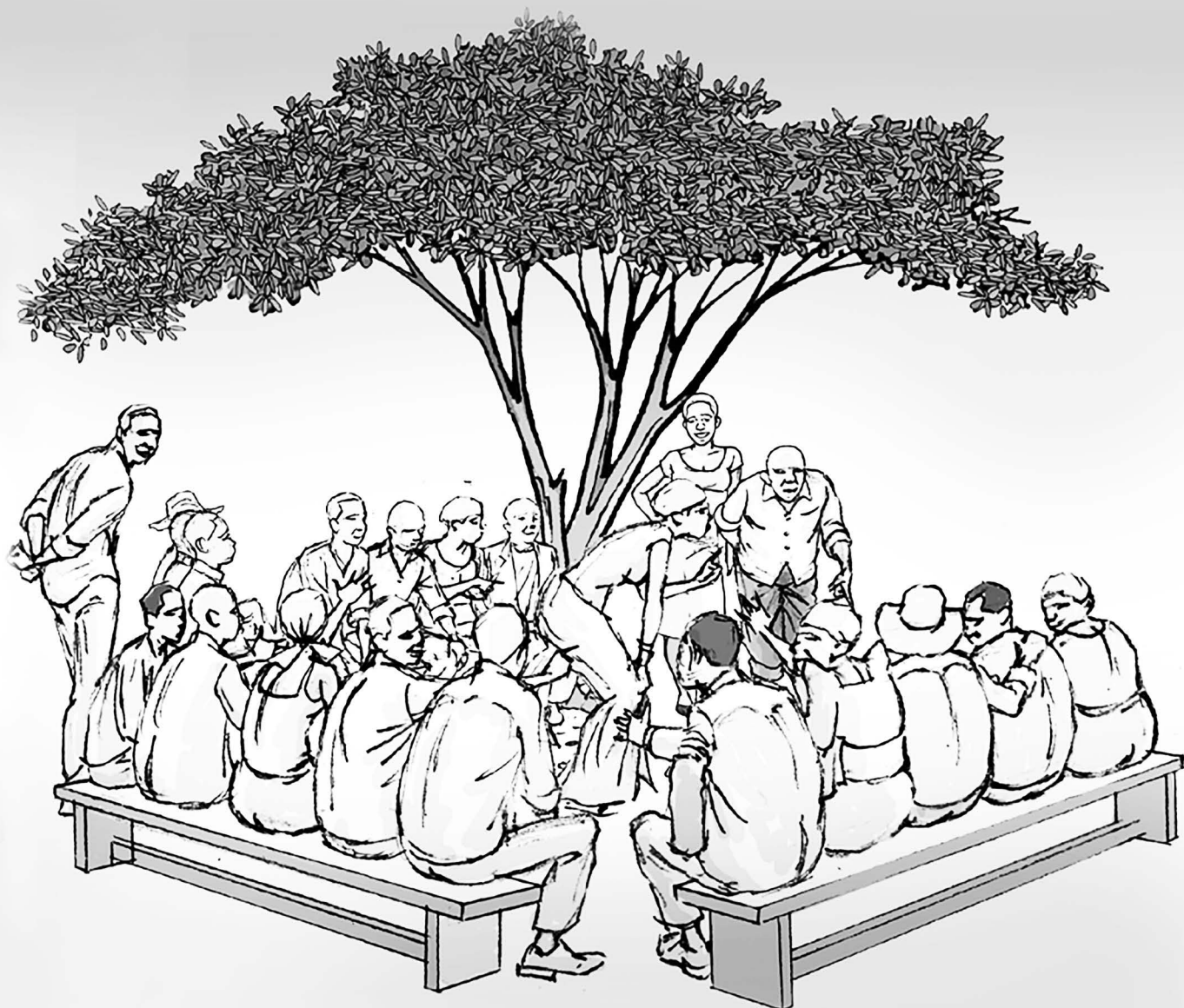


LEARNING FROM OUR EXPERIENCE

A guide to participative sistematisation



Adapted English version

Anton Luger, Lilo Massing

HORIZONT3000

2015

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PREFACE

Rosa Luxemburg, the fearless fighter for civil rights, once said: *“We will only succeed if we do not forget to learn”*. This handbook is about learning, about learning from our experience, about learning from our selves; learning in order to get stronger, learning in order to develop. This handbook intends to provide a methodology to “learn from our experience” so it is easier to succeed.

Grassroots organisations, NGOs and other institutions that work in the vast field of education and development have had many valuable experiences and these experiences have made important contributions to our society. However, the lessons that these organisations have derived from these experiences are often lost or forgotten – and then we do not have the possibility to learn from them.

More than twenty years ago at the launch of his book entitled *Para Sistematizar Experiencias* (To Systematize Experiences) Oscar Jara shared something that still holds true today, perhaps now more than ever:

*Systematization, the rigorous exercise of critically learning from and interpreting an experience, continues to be a pending task and today - more than ever - it can decisively contribute to the process of recreating the social movement's practices and to renovating social sciences' theoretical production, based on the day-to-day experience of the people . . .*¹

In the circles in which we move, the lack of a systematisation practice is not due to negligence but rather, in many cases, to a lack of knowledge about an appropriate methodology.

Many organisations do not venture into a systematisation process because they don't know how. This has motivated us to create this handbook, which explains how to go about doing a participative systematisation.

Our goal is not to “invent” a methodology or to create a new theoretical framework on how to systematise; most of this manual is based on reflections on the process by Oscar Jara of the organisation ALFORJA (Costa Rica) and by the *Taller Permanente* from Peru. If you are interested in reading about other viewpoints that will enrich your knowledge of systematisation, this handbook includes an annexed list of texts that are available for consultation.

This manual is based not only on a theoretical framework, but also on our actual experiences participating in and facilitating systematisation processes in Latin America (Nicaragua, Mexico, El Salvador, Ecuador) and Africa (Uganda, Kenya, Tanzania). We have tried to reflect on the lessons that we learned as a part of our experiences - good decisions and mistakes, doubts and questions.

Given that this process creates a base on which to build our learned experiences, we hope that this approach for participative systematisation will be analysed and understood in the context of your own perceptions, emotions, interests, practices and work experience. In order to facilitate this process, it is important to create participative and democratic spaces in which decisions can be made and responsibilities assumed.

An important element of this approach is acceptance of and respect for the participants' subjective, personal processes. The conflicts, uneasiness, doubts, joys, sorrow, frustrations, that result from an experience should be understood as legitimate expressions.

This handbook is structured as a practical tool: **Chapter One** includes theoretical explanations that have been summarised to help us understand the concept, scope and limitations of a systematisation process. **Chapter Two** describes the conditions that are necessary to carry out a systematisation and **Chapter Three** proposes a

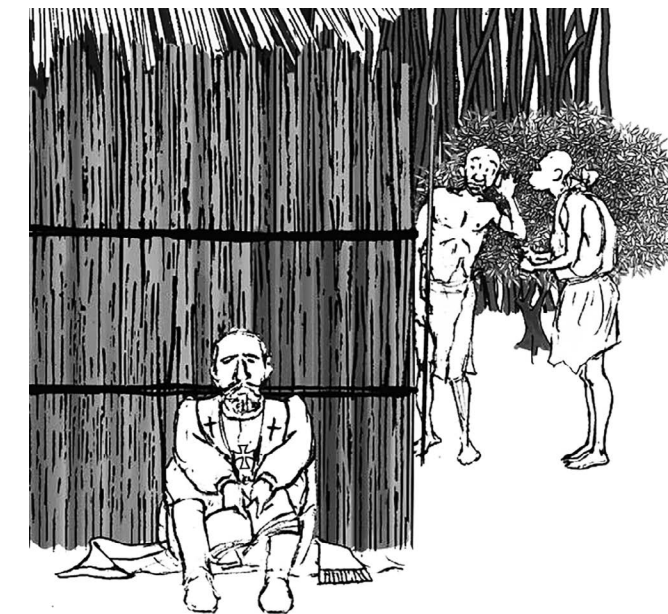
methodological approach and offers examples of how to undertake this journey of systematising our experiences.

Following the explanation of the steps involved in a systematisation process, we have suggested some tools that can be used in your work.

The goal of this handbook is to recover and share our experiences. This is not a recipe book, but rather an attempt to provide a working tool in order to systematise an experience in a very practical way. It is a text that is open to reflections and suggestions that might help to enrich its content. An organisation wishing to systematise some of their work, may find this handbook useful. If it is your first time to use this methodology however we recommend getting the help of an experienced systematisation facilitator.

This handbook is the second adapted English version of the original handbook in Spanish. We modified it for the East African context. This version has been reviewed with the help of newly trained facilitators and practitioners of systematisation in East Africa and we thank Andrew Tamale, Lucy Morewa, Celina Takali, Stephen Ssemakula, Victoria Nakafu, Rogers Kisubi and Kay Quentin Mengo for their valuable inputs to make this handbook an even better guide to systematisation of experiences.

Lilo Massing, Anton Luger
2015



CHAPTER ONE INTRODUCTION

To avoid confusion, to make sure we are speaking the same language, and to understand one another

FRIEND OR FOE?

There is a famous story in East African history about the journey of James Hannington, an English missionary, who was ordained Bishop of Eastern Equatorial Africa.

The good bishop set sail for East Africa reaching the coast at Mombasa in January 1885. In the months that followed, Bishop Hannington, in an effort to create a new route to Uganda, approached the powerful Buganda kingdom from the East not knowing that the reigning monarch Kabaka Mwanga was very suspicious about foreign intrusion from across the River Nile since “eastern invaders” of his kingdom had been prophesied. He therefore ordered the bishop and his entourage to be detained in Busoga, a smaller chiefdom to the east of the Nile, where the bishop was finally killed a few days later.

The story goes that apparently Kabaka Mwanga had after all decided to let the bishop come and given the order ‘mumute’, which translates as ‘release him’. However those in Busoga insisted that they received the order to kill him, which in Lusoga is ‘mumutte’, sounding very much like the Luganda ‘mumute’. The unfortunate bishop thus might simply have been a tragic victim of a verbal misunderstanding.

Even though we speak the same language, or use the same words, sometimes we don't understand one another. The same words can have different meanings and are subject to individual interpretation. To avoid confusion and to better understand what we mean, we will clarify the terms and expressions that we have used in this document.

CLARIFICATIONS

PROJECTS

Projects are usually the basis of institutional work. They are created in order to modify a determined reality and to improve interaction among the project's own participants. Projects are well-structured interventions that contain objectives, strategies, an action plan, a specific beginning and end, etc. As the word suggests, projects are projections towards the future that in reality (and fortunately) change and are adapted.

PRACTICE

We understand practice as the action of undertaking a project. As we execute this "action" or these activities, we also modify, adapt and enrich the project. We can therefore say that the practice is the project as it really happens.

What really happens is almost always different from the initial plan, because conditions change, people change, we have to re-arrange, we learn and change the course of action.

EXPERIENCE

Experience takes the project's practice one step further. It is not limited to the action; it also includes the personal perceptions and feelings of those undertaking the practice. These feelings like joy, fear, anger, etc. also determine the course of the action.

Experience can be what happens to us, like a child's first experience of fire, or what we learn during life, like the experience gained by a mechanic through practice.

We all experience something differently, as we perceive or interpret them differently so, experience includes interpretation, and feelings, and mostly: experience includes learning.

LESSONS LEARNED

Learning is an on-going, open and flexible process in which we reflect on and gain understanding about our experience. Life is a constant learning experience but many times we are not aware of what is happening. Systematisation allows us to become aware of the lessons that we have learned from our experiences.

KNOWLEDGE

We learn from experience", what does that mean? The child touches the fire, it is hot, the child feels pain, it learns not to touch. The more complex the experience becomes, the harder it is to describe the learning.

When we learn to ride a bicycle, we start off with some knowledge about the mechanical requirements, like turning the pedals, and maybe about the law of gravity, which can make us fall. That is explicit knowledge, the hard facts. Then we try it out, we fall, we try again, we get a few meters further, we try again and again, and after many times of practice and learning, we get to know and succeed to ride the bicycle. But would we be able to describe that knowledge, that learning? - most probably not.

We call this implicit knowledge; knowledge which is difficult to see or describe. In systematisation, through analytical reflection and interpretation, we try to turn implicit knowledge into explicit knowledge, so that we can understand and describe our learning and share it with others.

WHAT DOES IT MEAN TO SYSTEMATISE?

Getting closer to a definition

THE BURNT HILLSIDE

Some years ago, two friends were travelling together through the East African countryside. One was an older woman, farming for a living and hoping that her youngest son would take over the farm soon.



The other one was a trained agricultural extension worker, and a vigorous supporter of environmental issues. During their journey, they came through a hilly area and saw one of the hillsides completely burnt. Obviously people had cleared the land and set it on fire to burn the refuse. Tree stumps were still releasing small trails of smoke when their bus passed by. The agriculturist, with a frown on her face, saw the black ash and the bare soil. She shivered and could not help thinking of death, dirt, destruction and lifeless soil. Then she saw her friend smiling and asked her why. Her friend, the farmer said: "But don't you see that beautiful hillside there? They have just finished the work; it is now clean, free of pests and weeds, ready to be planted. Just beautiful!"

For a moment the agriculturist was speechless, but then started to see her friend's point of view and they discussed their different views for the rest of the journey. And what amazed them most was that neither of them could have imagined that someone could possibly have perceived a burnt hillside in such a different way...

We think that this story allows us to draw nearer to the “substance” of systematisation. Here we have two people who have one common experience, they see the same thing; however, each one perceives and, more importantly, interprets the experience in a different way. Just as people in a project are part of the same activities, but may perceive and interpret the process very differently. And if the different perceptions are not shared, people may not even be aware that they are different!

LET'S GET CLOSER TO A DEFINITION

Here we offer a variety of opinions from authors who have written on the subject of systematisation, based on their experiences or on a theoretical point of view. We have included some of the different concepts so that you can create your own definition. However, you shouldn't expect to find a “tried and true” definition of systematisation at the conclusion of this chapter.

Let's begin:

Rolando Garcia says that to systematise = organise the total² or entirety.

What total are we talking about? The total or entirety of the experience. In this context, it can be said that to systematise is to organise the experiences that have resulted from a specific process.

However, the systematisation process cannot end there. In addition to organising what has happened, it should also provide information about how these experiences are understood and interpreted. In the words of Oscar Jara:

*... we begin the systematisation of experiences by rebuilding what has happened and by ordering the different objective and subjective elements that have intervened in the process in order to understand and interpret and to learn from our own practice.*³

Jara suggests a new criterion: we must learn from our own practice. So, to systematise is to organise the total of our experiences in order to interpret and comprehend them. It helps us to become aware of the lessons learned in an organised manner.

However, in order to truly obtain a lesson from a given experience, it is not enough to describe and organise what has happened. As Marfil Francke and Maria de la Luz Morgan say:

*... it is only possible to obtain a learned lesson from the practice based on an analytical reflection that compares what we proposed to do, our initial knowledge, with what truly happened, which contains what we learned during the practice.*⁴

For example, Oscar Jara has called analytical reflection a critical interpretation, or rather a critical review, of the experience that, based on ordering and reconstruction, discovers or specifies the process' logic.⁵

However, the systematisation process doesn't end there; we must take it a step further. It is not enough to become aware of the lessons that we learned from the practice. We must also share this information with other people and communicate the results. We do this with two primary objectives in mind:

First: In sharing the results we can get important feedback on the work that is being developed. The opinions and observations generated by those who know the experience, facilitated through a systematisation process, can greatly enrich the practice.

Second: The lessons that we learn from a practice can be very useful to other institutions in the work that they may be doing in a similar field. The idea is not to “duplicate” the experience, but rather to provide an inspiration for new applications.

Yet another definition can be taken from the ActionAid Resource Pack on Systematization of Experiences:

*Systematization, then, is a process that intends to produce knowledge about action or practice, through the analytical reflection and interpretation about what happened. The understanding of the process allows us to not only improve practice, but also to communicate and disseminate the lessons and knowledge produced.*⁶

LEARNING FROM OUR EXPERIENCE

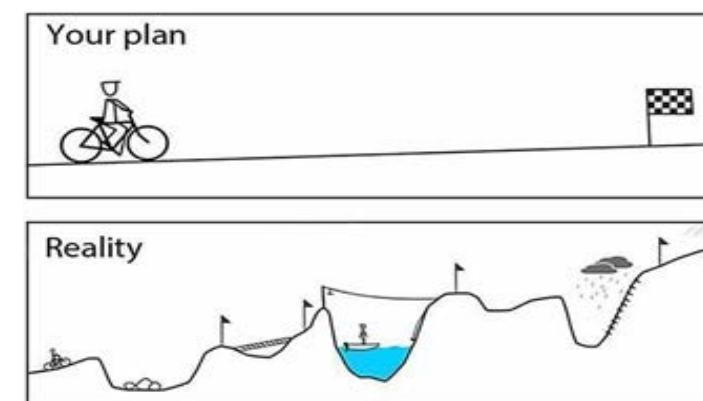
We now have some of the elements necessary in order to build a definition. We invite you to create your own concept of systematisation.

WHAT IS IT GOOD FOR?

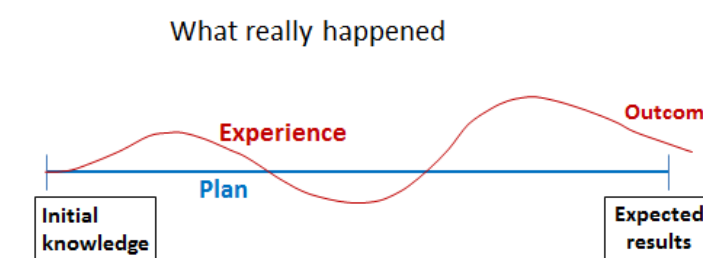
A systematisation process usually provides two important benefits:

1. It allows us to understand what we have experienced and to explicitly describe what we have learned during the process.

Life does not always happen to us as expected or as we had planned it. This drawing of a bicycle rider⁷ illustrates this in a funny way:



And just the same, projects do not always develop as they were planned. During the implementation of a project, many changes can occur for one reason or another. The following graph adapted from the ActionAid Resource Pack⁸ illustrates the straight course of our planned actions and the different course of our experience, or what really happened:



A project is planned using our initial knowledge we have about the unwanted situation and how we believe we can change it for the better. Our practice and what really happens almost always takes a different course, because there may be a change in the context or the people involved. We also continuously learn during our practice and adapt it to changing circumstances.

A systematisation allows us to do the following: Analyse and understand the factors that have intervened and the way in which they have influenced the development of the process; analyse the relationships and the changes that happened at significant stages in the process; and, understand how the experience has developed and how we can improve upon it. In short, *why* did the experience happen *in a specific way and not in another way*.⁹ It enables us to produce new knowledge which we did not have yet or were not sure about.

Participative systematisation allows us to obtain a *common vision of the process we have experienced, the things that were done right and the mistakes, the limits and the possibilities. This allows for greater group cohesion and coherence and allows the systematisation process to play a role in the group's self-development. Additionally, it takes the lessons learned and uses them to help us overcome the tendency towards activities and mechanical repetition of procedures that were successful in the past.*¹⁰

2. It allows us to share the lessons learned with other people and institutions

Our experiences are full of lessons, some of which we are aware of and others of which we are not. Systematisation can make these learned lessons “visible” or explicit.

When our learned lessons become visible, we can communicate them to others. So, then, systematisation allows us to share our experience and its lessons with others who were involved in the process and with other institutions. This enriches the process, using our day-to-day practice as a starting point.

What we can say is that systematisation helps to contribute to a collective learning process by publishing the information in books, booklets, magazines, videos, compact discs, radio programmes, and other media, which can also improve the practice of others.

COMPARE FOR A BETTER UNDERSTANDING OR “WHAT IS IT NOT FOR?”

For a better understanding of systematisation it may be helpful to compare it with other knowledge-producing methods such as evaluation and investigation or research. Each method has its own purpose and it is important that those wanting to systematise their work consider whether it is the most useful method for the outcome they need.

We have said that systematisation allows us to understand the process of the intervention and to learn from it. We understand why it has taken that course and what we can do better next time. It is process-oriented and the main focus is on OUR practice. We can systematise a successful intervention to be able to explicitly describe how to do it the next time. Or we could systematise a ‘failed’ project so to be able to understand where we went wrong and what we need to do differently next time.

An **evaluation** usually serves to assess the success of an intervention and how far expected results have been achieved. It is therefore result-oriented and the main focus are the beneficiaries. We want to find out to what degree the beneficiaries’ situation has improved through our actions.

A **research or an investigation** is done to discover facts about a certain aspect. We ask ourselves what exactly is happening, rather than how or why something has happened.

An organisation promoting agribusiness development with farmer groups might want to evaluate how much farmers’ income has increased, they may wish to do a systematisation to understand what needs to be done differently for farmers to adopt sustainable agriculture practices and they may need to do a research which sustainable agriculture practice increases yields most.

The Action Aid Resource Pack on Systematisation¹¹ compares the different methods in a table which we have adapted for this handbook:

	RESEARCH	EVALUA-TION	SYSTEMATI-SATION
PURPOSE	Getting a detailed and proven account on a particular aspect	Assessing the success of an action/inter-vention	Understanding the process of the interven-tion in order to learn from it
QUESTION	What exactly is happening?	How far have expected results been achieved?	How has this intervention happened and why like that?

Systematisation and other knowledge producing methods do not exclude, but rather complement and support each other. Even though systematisation does not focus on results, it helps to know if action was successful or not, in order to understand how things happened and why. So, systematisation does not ‘rate’ a project’s success or failure, but is interested in lessons learned from both success and failure. And it works best, if those who undertake a systematisation have a real need for those lessons learned; a need to discover that new knowledge in order to turn it into improved practice.

From our experience a systematisation is not needed for the mere **documentation** of an experience, a programme or a process, where the analytical steps are left out.

Sometimes a **training or consultancy** may be the method of choice for knowledge production. After all, in systematisation we are learning from experience, from our own practice. If we have done little in that particular field of our work, we may not have a broad enough base to learn from.

WHO PARTICIPATES IN THE SYSTEMATISATION PROCESS?

The systematisation process that we are proposing is both collective and participative. What does this mean? Simply put, just one or two people cannot systematise an experience that has been lived and shared by many people; it requires the involvement of all those who were part of the experience.

Let’s recall for a moment the story of the two women seeing the burnt hillside. They could only understand the entirety of what was happening, when they brought their experiences together. One individual’s experience is not enough to help us understand people’s actions or reality.

*Our perceptions become “reality” when they are agreed upon in consensus within a social dynamic.*¹²

The same is true of systematisation: if we do not incorporate the different points and views and experiences held by those who participated in the process, we run the risk of reflecting on only one part of the experience.

Does this mean that all the participants who have been involved in the project must participate in the systematisation?

No! Take the example of a rural development project that included the participation of 5,000 farmers. It would be impossible to incorporate all participants into the systematisation process.

In our example of an organisation promoting agribusiness development with farmers the groups of participants were:

- First group:** the organisation’s implementing facilitators and trainers
- Second group:** the farmers and their families
- Third group:** the district government development officers and local traders.

So how do we “rebuild the shared version?”¹³ - a shared version of the reality that was experienced?

- In most projects there are three groups of participants:
1. Project facilitators or implementers
 2. Beneficiaries, direct and indirect
 3. Other stakeholders (Some projects may have co-operated with other institutions, implementing project activities with others from those institutions, e.g. government officers)

As you can see, it is not always possible for all people who were part of the project to be involved in the systematisation process. This is especially true for the second group, which is usually much larger. In this case, it is important to choose some people who represent the collective group who will participate in the systematisation.

In Chapter Three of this manual, entitled “The Methodology”, we provide a more general description of each of these groups and their participation and role within the systematisation process. Many projects receive funding from international agencies and other development partners. It is interesting and beneficial to invite representatives that work for these institutions to participate in the systematisation. They may be able to provide a different perspective on our experience and thereby enrich the analysis. The participation of the funding institutions may be challenging given their physical location, but technologies such as the internet can help us to communicate (and help to overcome distance). It is not necessary that these people participate in the entire process; they can join in for part of it. For example, they may participate when we are retrieving the history of what has happened or during the critical analysis phase of the systematisation process.

Bear in mind!

One question that arises from this discussion is: Do you think it is possible for an “outsider”, an expert, to systematise our experience? We are convinced that this is not possible. The systematisation must be done by those who have been part of the experience or project; you cannot systematise an experience if you have not been directly involved.

That said, when doing a systematisation for the first time, it may be advisable to request the help of someone outside the institution or organisation, who is familiar with facilitation of a systematisation process.

CHAPTER TWO

LAYING THE GROUNDWORK

CONDITIONS

It is important to create some basic conditions necessary for systematising an experience: we need a facilitation team, an agreement with the institution, access to information, etc. These conditions are indispensable for our work. Yet, if they don't exist, they can be created. What is important to understand is that it is impossible to begin the systematisation without having laid the groundwork.

FACILITATION TEAM

In our opinion, the facilitation team is of vital importance; a participative systematisation cannot be done without a team to facilitate this process. We view this team to be the steam engine of the process. The steam engine is part of the train, it is at the front, it leads the other carriages, defines the speed, etc. The facilitation team's task is to carry the process forward - to plan and facilitate work sessions and to write the preliminary and final reports. The team should be made up of three to five people who are part of the institution's staff.

The role of the facilitation team is not to direct the process, but rather to create the space and environment in which participants' reflection and discussions can happen such that they are able to flush out the lessons learned.

At the same time the facilitation team is deeply immersed in this process as well, sharing their own perceptions of the experience and practices with the rest of the group.



They make sure that participants don't get lost in the vast array of the experiences, and stick to the framework of the systematisation. And they animate participants to ask all the questions needed to finally understand the experience and draw the lessons from it.

If the team and participants are embarking upon systematisation for the first time, it is advisable, as we mentioned above, to seek an outside facilitator who can orient and accompany them through the process.

SUPPORT FROM THE ORGANISATION

Systematisation implies work time and the expense of human and economic resources. Those who lead the organisation must make the decision to support the process and to dedicate the resources necessary for the work sessions (refreshments, transportation, supplies, etc.) and those resources needed to share the final results of the systematisation process.

In addition to financial resources, the process requires working hours. This means that the organisation must relieve the participants, particularly the facilitation team from some of their responsibilities so that they can dedicate the necessary time to the systematisation. It is best if this can be a part of the organisation's annual planning session.

It also happens that those who lead the organisation are the ones proposing to do a systematisation, rather than those who implemented the project. It has to be made very clear what their motivation for the systematisation is and again, implementing staff need to be given sufficient time and possibly be relieved from some of their other work duties.

The million-dollar question: how much time is needed to systematise a particular experience? Unfortunately, we cannot answer this question because it very much depends on the nature of the project and those aspects that we want to systematise. A rough calculation is that the

facilitation team will have to spend one workday per week for six to twelve months. Other participants will have to spend 10 to 20 workdays throughout the entire process.

RECORDS, ACCESS TO INFORMATION

Systematisation means, among other things, the retrieval of information about what happened during the experience. To retrieve this information, we must have the records that were generated during the project's implementation: reports, workshop proceedings, minutes of meetings, planning worksheets, etc.

There will be some complications if these records do not exist, but there are alternatives such as interviews, life stories, and recollections that will allow us to retrieve information about what happened during the experience.

HOW TO GET STARTED ?

How do we start the systematisation process? Institutions that have not done a systematisation before, may start by having a participative meeting within the organisation to clarify the motivation for the systematisation (who wants and who needs the learning?) and whether it is the best method for the outcome needed (compare the section What is it not for?). For this first meeting, it may be advisable to get the help of a person who is familiar with facilitation of systematisation.

This could be the right time then to create a core facilitation team. More members could be added in the First Workshop when it has been agreed on what is going to be systematized.

THE FIRST WORKSHOP

We suggest beginning the systematisation process with a participative workshop in which the framework for the systematisation is created together.

The facilitation team should identify and invite people who participated in the experience and who are interested in being a part of the systematisation process. The team should make sure that members from all groups of participants, who were part of the experience or the project, are represented. We believe that a group of 15 to 20 people is appropriate for this kind of workshop. The participants must get to understand the importance and agree upon the purpose and scope of the systematisation process. They should be informed about the time and work that will be required to participate in the process.

Points to be addressed during the First workshop:

- What do we mean by ‘systematisation of experiences’?
- What are the benefits of systematisation?
- How is it done? What are the steps involved in the process and how do we go about taking them?
- What is the framework for the systematisation that guides us through the process?
- What is the general plan of activities for this process?
- What do we need and how can we get the resources we need?

Bear in mind!

In the next chapter “Methodology” you will find more information on those points to be addressed, as well as a list of suggested activities, and tools that may be helpful in the development of this first systematisation workshop.

DEVELOP A GENERAL PLAN

We suggest using the First workshop also to develop a general plan for the systematisation process, once the framework is agreed upon. The plan details the steps included in the process, the general activities, a list of resources, and tentative dates on which the systematisation will take place. This plan should answer the following questions:

- What are the activities that will be included?
- Who is in charge of each activity?
- Who will participate in each activity?

- What resources do we need?
- When will we do each activity?

Systematisation planning worksheet

Objective:
Subject:
Central aspects:

The following table may be useful in helping to create the plan.

STEPS	GENERAL ACTIVITIES	WHO IS IN CHARGE	PARTICIPANTS	RESOURCES	DATES
Step 3: Retrieving the history	Report reading, group interviews,	Pro-gramme officer John	6 farmer groups	Reports, facilitation for group visits	May 2011

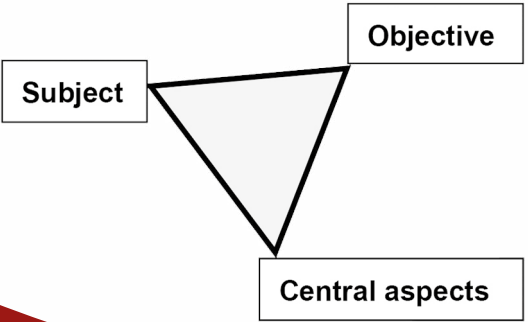
Times and dates depend on the pace of the work and the resources are determined by the activities that are to be included. This handbook proposes a number of participative workshops for the systematisation process, which implies that material resources will be needed for each workshop and financial resources will possibly be required to pay for refreshments, transportation, the meeting venue, etc.

The facilitation team may develop the general plan on their own. However, doing it together with the selection of participants at the First workshop helps to get a better understanding of the process that is being developed and participants will be able to contribute their ideas and observations.

We believe that the general plan provides a roadmap that gives an idea about what route to take. It is a tentative map that has been written in pencil. There may be times in which we need to take out an eraser and make necessary changes to adjust the roadmap to our needs and the needs of the other participants.



Our experiences



CHAPTER THREE

THE

METHODOLOGY

We suggest doing a systematisation in these five steps:

1. Defining the framework
2. Describing the context of the experience
3. Telling the history or reconstructing the experience
4. Critical analysis of the experience
5. Communicating the results of the systematisation

These steps are linked but not necessarily followed strictly one after the other. When finishing one step you may discover that you have to go back and review a previous part of the systematisation process, before continuing.

STEP 1

DEFINING THE FRAMEWORK

The first step is fundamental in orienting the systematisation process. We call this step setting the cornerstones. They will be our guides through the systematisation journey so that we do not get lost in the vast array of our experiences.

It doesn't matter in which order the three cornerstones are created. We can begin with the “objective”, the “subject”, or the “central aspects”.

What is most important is that the cornerstones are well defined and connect to each other before we move forward with the systematisation. In every step of the systematisation we will refer back to this framework and consult with it, to see if we are still on the right path and do not wonder off to other areas of our experiences.

The “objective”

Why do we want to do this systematisation?

Systematisation implies work, effort and resources. So, why do we want to do it? What do we hope to gain from it? What are the benefits? At this time we must specify the reason why we want to systematise - we must define the objective or the purpose of this systematisation.

We may also start to think about the type of product for sharing that we want to develop, and who to share it with.

An organisation is doing HIV/AIDS awareness and prevention programmes and provides specialised trainings and coaching to social workers and health workers in different districts. They wanted to improve the quality of the trainings and come up with a more standardised training manual.

Their objective for their systematisation was “To develop a training manual based on the lessons learnt from trainings in the first project phase.”

In order to define the objective, it may be helpful to revisit the first chapter: The section entitled “What is it good for?” may lead us to a definition of our systematisation’s objective.

A systematisation will bear more fruit if there is a genuine reason to do it; if there is an urgent need for those lessons learnt.

The “subject”

What part of our experience do we want to systematise?

Let’s take a step back. Let’s close our eyes and think about everything that we do on a day-to-day basis in our work. We do a lot of different things, right? Can we address them all as a part of the systematisation? No! That would be impossible.

It is therefore very important that we specify which part of our work we want to systematise - in other words, define the subject of the systematisation. “Subject” in this case is not used in the way of ‘topic’, but rather as the object of our reflection and analysis, the part of our practice or our experience that we want to look into deeply.

From our total practice, our programmes, projects, areas of work, we choose the one we want to systematise. Then we narrow in on the geographical area and the time frame in which it occurred. We may select a representative part of the whole operational area and reduce the timeframe to a particular period that interests us most. We may also reduce it to a particular group of the participants, maybe the women beneficiaries.

Again, we also look back at the objective; what do we hope to gain from it? That will help us to define the subject.

The organisation wanting to systematise their AIDS prevention programme chose as their subject “The sensitization activities as well as trainings of health and social workers in 2 of the 5 districts in 2011 to 2012”.

The “central aspects”

What aspects of the experience interest us most?

Another fundamental part of the systematisation’s framework are the central aspects - which provide the focus of the systematisation. Oscar Jara says that the central aspects are like the spinal cord that connects us with the entire experience, based on a specific perspective.¹⁴ We must define this perspective and specify the systematisation’s objective and subject.

The central aspects specify the part or perspective of our practice that are of greatest interest to us. Where do we want to look deeper into our practice, understand better how exactly we did what we did and why things happened the way they did?

It may be helpful to formulate them in a question, asking ourselves what exactly it is we want to understand about the experience, in regards to our subject.

- *Maybe the methodology of our work?*
- *The institution’s organisational development?*
- *Or the way in which we apply the theoretical proposal?*
- *Or perhaps it is building the self-esteem of those who work with the institution?*

When defining the central aspects, we should focus on what we don’t yet know about the experience, and what we need to know in order to learn from the experience.

A systematisation process can focus on more than one central aspect and often includes two or three. However, the work becomes complicated if there are five, six or more central aspects. It is better not to try to answer too many questions with one systematisation.

The organisation wanting to systematise their AIDS prevention programme chose as their subject “The sensitization activities as well as trainings of health and social workers in 2 of the 5 districts in 2011 to 2012”.

This is another example of a systematisation framework developed by SOLES, an organisation that works with children who are at risk of a life on the streets in Esmeraldas, Ecuador.

In carrying out the systematisation, the organisation’s primary interest was to strengthen their educational-preventative approach, based on their own institutional practice, and to be able to share this with other like-minded institutions.

Let’s take a look at how the people at SOLES formulated their objective, subject, and central aspects in the systematisation process:

Objective:

Strengthen the organisation’s educational-preventative approach and share this information with others.

Subject:

The three institutional programmes: the community, the street and the technical training in the city of Esmeraldas, between 1995 and 2002.

Central Aspects:

- 1. The way in which the educational-preventative approach has been applied in practice*
- 2. The institution’s development as an organisation*

People wanting to systematise their experience often find it difficult to limit themselves to a part of their experience within the cornerstones. Keeping it broader and looking at too many aspects however, may provide us with an overview but not a deep understanding of what has happened and why. It is advisable then to do more than one systematisation, if resources allow.

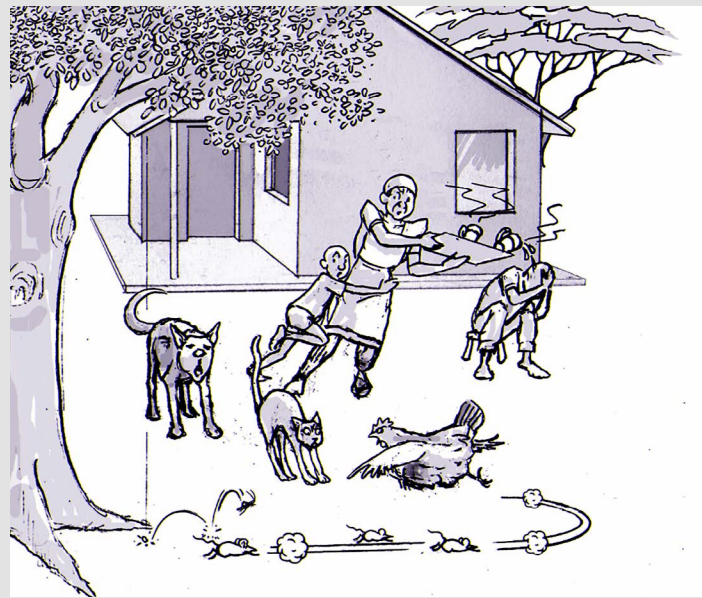
WHO DEVINES THE FRAMEWORK, SETS THE CORNERSTONES?

On the one hand, if systematisation is truly a participative process, then the framework should definitely be created collectively. On the other hand, for practical reasons it is difficult to include all project participants in the development of the framework. So, what do we do? We propose that the following people are involved in this important phase of the systematisation:

- **The facilitation team.** This group of people will make it possible for us to “define the cornerstones.”
- **Some of the institutional staff.** If there are just a few people who work for the institution, this could be the entire team. Those who direct or coordinate the institution should be included in this group.
- **It would also be ideal for some of the project’s beneficiaries** to participate, though this may be difficult. For example, it would be difficult to create a systematisation framework and include pre-schoolchildren in this process. However, it may be possible to invite farmers who are participating in a project to market vegetable crops.

The preference is for the framework to be created in a participative manner such that the results will be rich and the fruit of the process will correspond with the expectations, interests and needs of the majority of those who are involved in the process.

Another way to create the framework in a participative manner is for the facilitation team to create the framework and then consult with the institution’s leaders and some of the project’s participants. If a project team wants to do a systematisation of a particular experience, because they need the results for future project proposals, it is only fair - and not less participative - for them to suggest the framework and discuss and negotiate it with others who were involved.



STEP 2

THE CONTEXT:

or are we part of something bigger?

*In order to be
I must be another,
leave myself,
search for myself in the others,
the others that don't exist
if I don't exist,
the others
that give me total existence.*

Octavio Paz

No project is developed in a vacuum. We are immersed in life and are a part of life. Everything around us influences who we are, what we do, what we know and feel and we also influence our surroundings. Therefore, our environment plays an important role in influencing whether or not we achieve our objectives during the course of our work. When we understand what is happening around us we can understand and analyse our experiences. The description of the characteristics of our environment is what we call context.

Our environment is dynamic and immense and it is impossible to describe everything around us. We must set limits and choose the part of our environment that is directly related to the experience.

We can ask ourselves with every piece of the context whether it has influenced the course of the experience or

project or not. If we are in doubt we should include it, as it may have a meaning which becomes visible only later.

We offer some ideas to help determine the most relevant contextual elements in a systematisation process. However, each team should define its own context, taking into account the project, the environment and the framework that has been established.

NATIONAL AND INTERNATIONAL CONTEXT

Whether we like it or not, we are all part of a country and this country's geographic situation, history and politics undoubtedly influence our work. Take for example an AIDS prevention project. The project would obtain better results in a country in which the government assumes the responsibility for and funds prevention and treatment of this disease. This is not the case in a country in which the government doesn't assume responsibility and ignores both the consequences of the disease and those who suffer from it.

It may be therefore necessary to describe some details of our country's geographic, political, economic, social and cultural characteristics as well as the region and community in which the experience has happened. For example, if the work were done in different countries - for example in several, different East African countries - it would be important to consider and describe this international context.

LOCAL CONTEXT

Many projects do not cover an entire country but rather a smaller geographical area. These projects may be part of a local context: a neighborhood, a city, or a specific region of a country. It is important to describe this context in relationship to the project.

LEARNING FROM OUR EXPERIENCE

What are the points of interest in this local context? They are similar to the national context, but more specific. They may include local culture, the socio-economic situation of the region, the history of the neighbourhood, the city's political organisation, resources, etc. as they relate to the project's objectives.

ORGANISATIONAL CONTEXT

All projects are initiated and driven by an organisation or institution. This may be an NGO, a governmental or church-based organisation or, perhaps, a grassroots organisation. Each organisation has its own institutional framework. In order to understand the work and experience, it is important to clarify the organisational context.

This description should briefly and concisely respond to the following questions: Who are we? How do we work (as an organisation)? What do we do?

THE ORGANISATION'S APPROACH

The approach or methodology that is used in a project is a fundamental part of the organisational context. All institutions and projects are working towards something in order to influence or change a particular reality. The way in which they influence usually follows a theoretical concept, which we call the organisation's approach. To describe this approach we ask ourselves "what is the theory, the project is based on?"

For example, an adult literacy project may find its theoretical base in popular education as defined by Paulo Freire. There may be other theories or philosophies for this same kind of work. In this case, the idea is to propose work in the field of popular education. This is the theoretical base that should be briefly explained for the purposes of the systematisation.

To clarify further we offer another example: an agricultural extension project may support the formation of self-help groups before any agro-technical intervention. It is important to define the focus of the project and shortly explain the theory behind why it is done that way.

All projects have this theoretical concept or approach. However, sometimes it has been created unconsciously rather than in an explicit manner. If this happens, it is important to reflect on and clarify the approach as a part of the systematisation process.

During the project's implementation, the approach may change or be adapted - sometimes this happens. The changes in the practice are further described in the section entitled "Telling the history."

DESCRIPTION OF THE PARTICIPANTS

Can you imagine a project without participants? Impossible, right? Participants give life to a project. Different participants have different functions. To understand and analyse the project's process, it is important to introduce and describe those people who are part of the process, to know who they are and their role in the project.

We will describe:

- who is directly involved with the project (the project staff)
- who the project is directed towards (the direct and indirect beneficiaries) and
- who the project's other stakeholders are that had an influence on the course it has taken.

In our example of the organisation promoting agribusiness development with farmer groups, we should describe:

- the team that facilitates the trainings (the institutional staff),
- the farmers and their families (the people to whom the project is directed) and,
- the traders with whom the farmer groups developed relationships with

What are we interested in knowing about these people? Who are they? What are they like? How do they live? What do they do? What role do they play in the project's development? In some cases it may also be interesting to ask ourselves the question about what education or training these people have, e.g. are they literate?

Our experience tells us that by beginning with the description of contexts, we take an important step in entering the systematisation process. Though this information can be developed along the way, we believe that beginning with a definition of contexts allows us to see the project as part of a larger and more complex reality and this broader vision towards reality will ease the other steps in the systematisation.

HOW TO DO IT?

Define who will take responsibility

Once the contexts that will be a part of the systematisation have been collectively defined, those who will take responsibility (within the facilitation team) for writing the descriptions should be determined.

List of questions

One way to facilitate the description of contexts is to make a list of questions that determine what we need to know about each part of the context. This means that we will gather the information that is necessary to understand what we have experienced. The list of questions is created by the facilitation team. We have already suggested some questions above, but keep in mind they may not be relevant for your project's context.

For the national context, for example, one of the questions could be "Which national policies have had an effect on the project?", provided this is relevant to your context.

Research

It is sometimes necessary to do some research in order to get the information needed to describe the contexts. We suggest a bibliographic investigation, which will provide general, geographic and statistical data.

In order to describe the participants, it may be useful to interview them. The list of questions previously described serves as a base for the bibliographic research and for the interviews.

Participative writing process

This idea has been very valuable in the systematisations in which we have participated. Once the text has been finalised, those designated to write about the contexts pass them on to someone else so that others can add to, subtract from, or change whatever they feel necessary. The texts are "rotated" from one person to another and, as this happens, they are enriched and grow. This process is most successful if the documents are passed around as computer files so that they can be easily exchanged.

Bear in mind!

At the beginning of the systematisation process it is important to clarify that the text doesn't belong to anyone. Each text is a base for the next one and at the end of the process everyone has been involved in drafting the final document.

STEP 3

TELLING THE HISTORY:

Retrieving information about what we have experienced, or "what happened?"

*...a memory can have cheeks
and songs and soothing
it can be a fantasy that suddenly
becomes the womb or the people
perhaps a green rain
through a shared window
or a sunny plaza
with fists in the air ...*

*...a memory
that has been established in love
cleans our lungs
... arouses our blood
shakes up the autumn
... renews the skin
and sometimes summons forth
the best that we have
a small piece of the great achievement that we have yet
to fulfill*

Mario Benedetti¹⁵



Beautiful, right? We begin with this fragment of Benedetti's poem because he uses colourful language to express the content of the third phase of the systematisation process: remember, relive the experience, and retrieve information about what happened.

There are two important parts to this phase: first we rebuild the history of what we have experienced and second we order and structure our memories. Let's look at each part:

REBUILD THE HISTORY

We must obtain sufficient information about the experience that we want to systematise in order to visualise it as a process. This is not the time to analyse the experience, but rather to make ourselves aware of what happened and how it happened. As Mario Peresson says, this piece of the work is primarily testimonial and narrative,¹⁶ it is about describing how the practice has evolved and been transformed.

It is our experience from accompanying systematisation processes that this is the most exciting moment. It is exciting because it stirs up a lot of emotions and gives us the opportunity to recall what happened during the experience. When we remember what happened, we are able to "re-live" significant events, or, as psychologists might tell us, evoke the feelings that accompanied the experience.

In some cases "re-living" also means relieving the memory from any "emotional charge" that was experienced during the process but not expressed. These memories can bring up happiness and smiles or sadness or anger, and sometimes even tears. The idea is to reconstruct the experience, a vital and necessary process in order to relieve our emotions and feel better about what happened. We think that it is important to respect the expression of these emotions.

If you take on too much, you will end up doing nothing

You may have heard this expression. If we want to limit the scope of information, we must limit the process in which the experience is reconstructed. The guidelines are defined by the framework of the systematisation, its objective, subject, and central aspects. These will guide us along the path and indicate which part of the experience should be described and which information we need to gather, to be able to answer the questions we have about the experience. Particularly the central aspects will help us to focus on the amount and kind of information we need, to understand and visualise the process of what has happened.

Sources

To retrieve information about the process we must rely on two important sources:

- Records that describe the experience: reports, workshop minutes, notes, meeting minutes, field logs, photos, videos, etc.
- Individual memories: the memories of those people who have participated in the experience.

Some projects have maintained little recorded information about the experience and this makes the process of retrieving information difficult because the process must depend exclusively on the participants' memories, which are often subjective and partial. We believe that both the records and the recollections are indispensable sources for this process. They complement each other and help to paint a full picture of what happened.

The participants' personal and subjective recollections offer different points of view, which enrich the process. In systematisation it is important to reflect on the diverse ways in which reality has been perceived.

Bear in mind!

While retrieving the history of the experience, it is important to remind ourselves that we want to find out about what really happened in the project, not what we had planned or hoped would happen. And it is OUR practice, we are looking at!

HOW TO DO IT?

List of questions

The first thing that the facilitation team should do is create a list of key questions. The questions are based on the experience and used to obtain enough information in order to retrieve the process. What is it we want to know about the experience? The systematisation framework (the cornerstones) creates the guidelines necessary to formulate the questions.

An important moment in any project's history is its "genesis". In order to fully understand the process and the lessons that have been learned, it is important to explore this "launching point" in-depth. We can start to ask ourselves (and others) the following questions: Who had the initial idea for the project and when did this happen? Why did this project get started? What were the initial objectives and intentions? What facilitated getting the project started and what were the obstacles?

When we have established that, we could continue describing what happened in a chronological way. All along, we keep the framework, especially the central aspects in mind. If one of our central aspects was 'the methodology we applied', then we may ask what methods have we used? How did we apply them? Who did what? And when? What materials did we use?

Bibliographic research

It is important to review existing records: files, minutes of activities, reports, letters, field notes, etc. that have been kept during the course of the project. We read the records in order to obtain information that is necessary to answer the questions. Not all of the information provided will be useful. We recommend transcribing important data and photocopying or highlighting sections of the documents that are relevant.

Interviews

It is useful to "converse" with individuals who can offer crucial information about the project's development. The interviews are helpful when key people involved with the project are not able to participate in the workshops. The interviews are based, again, on a list of questions that has been created in advance.

The interviews can be done in different ways. For example, they can be recorded and transcribed or, if the person is located far away, the interview can be done by telephone or email.

It is important to let the other person talk. The interviewer's only role is to formulate questions. In some cases, those who are being interviewed may get lost in their thoughts and talk about things that don't have anything to do with the subject matter. In order to receive the information that we require, it is important to re-ask the question. Again, our guide for that is the framework to limit ourselves to that part of the experience we want to systematise.

It is crucial to create a relaxed environment during the conversation, in which participants can bring out their feelings, perceptions and views freely.

As the tool of asking questions is a very important one in most phases of the systematisation, we would like to say a few more words about 'questions':

QUESTIONS ABOUT QUESTIONS

*I keep six honest serving men
(They taught me all I knew);
Their names are What and Why and When
And How and Where and Who.
Rudyard Kipling*

Nice poem by Kipling, isn't it? However he is not the only one who believes, that the starting place of every learning process is a question. Paulo Freire the father of "educación popular" (which is the basis of systematisation) talks about the "pedagogic of the question" – he says that:

*An education of questions is the only creative and appropriate education for stimulating the human capacity to be amazed, to respond to this amazement and to resolve his/her true essential and existential problems. This, itself, is knowledge.
Paulo Freire¹⁷*

So, let us explore a little bit more this issue of "questions", and let us begin with reflecting on the difference between open and closed questions.

CLOSED QUESTIONS

Closed questions are normally questions which can be answered by a single word or a short expression. For example: How old are you?

The answer can only be a number or perhaps "I don't know".

Closed questions are normally used for:

"Yes and no" answers: Do you like this cloth?

Getting short and precise information (facts): How many brothers do you have?

Controlling the conversation: The person who questions is in control of the conversation, as the person who is questioned only can answer some words and cannot "escape".

When we pose a closed question it is the first word that sets up the dynamic of the closed question, signalling the easy answer ahead. Note how these are words like: do, would, are, will, if.

You can also turn any opinion into a closed question that forces a yes or no by adding [tag questions](#), such as "isn't it?", "don't you?" or "can't they?", to any statement¹⁸.

OPEN QUESTIONS

Open questions are questions which invite the person asked to give a longer and far-reaching answer. Open questions do not give respondents answers to choose from, but rather are phrased so that the respondents are encouraged to explain their answers and reactions to the question. Open questions allow respondents to include more information, including feelings, attitudes and understanding of the subject¹⁹.

Example: What do you think about? You can expect that the person questioned will go into more details, will explain very well what he/she thinks about the topic.

Open questions are normally used for:

Making people think and reflect.

Giving people the opportunity to express their opinions and feelings, telling “their” part of the story.

Handing over the control of the conversation to the person who is responding.

Open questions begin mostly with: what, why, how, describe....

Now, thinking in the spirit of a systematisation – what do you think is the kind of question we are looking for.

Obviously, it is the open question, as our intention is to make people tell us their experience, their feelings, and so forth – and we do want to make them (and us) reflect on the things we did.

QUESTION THE EXPERIENCE

What does this mean? How can I question an experience? I have to question people, or what...?

Let us see.

Throughout this handbook, in the different methodological steps, we suggest some tools which facilitate the whole systematisation process. For us, one of the most powerful tools is the so called “list of questions”. Now, when you prepare a “list of questions”, it is very useful to think of the specific topic (and in systematisation this is our experience) I want to know more about. I am going to ask some questions about the experience, all I want to know about this particular experience – and when I have finished my list of questions, I can think about who can answer these questions.

When I think first about who answers the question I'll limit myself, as I know that this or that person does not have all the information and therefore my list of questions could be too narrow.

SYSTEMATISATION VERSUS EVALUATION

That's a subject we already explained in Chapter One – but bring it up again here, as we have learned in our experience that when phrasing questions, we need to be careful not to drift into the field of evaluation.

Systematisation questions do not intend to “measure” or to “assess” what was done – but rather to explain (and to understand) how and why things were done.

Let us see an example about a poultry production project:

A possible question could be: How many chickens did you sell every week at the local market? This is a typical evaluation question - and very correct if we want to evaluate the project.

But in the case of a systematisation we are not so much interested in the quantity of chickens these people sold than in the way they did it.

A possible systematisation question could be: Tell us how you sold the chickens at the local market? So, maybe the persons we ask will tell us too how many chickens they sold, but they will mainly focus on the way they did it – and that's what we are interested in.

If you take a good look at the two questions you will see that: “How many chickens did you sell every week at the local market?” is a closed question; and: “Tell us how you sold the chickens at the local market?” is an open question.

Workshops designed to retrieve information about what has happened

These are collective spaces in which participants share their memories about what happened. The list of questions is the basis of the workshops and it allows the participants to retrieve information and to orient and shape their memories of the story that we are retrieving. In order to organise and develop the workshop, it is important to consider who the participants are, the resources that are available and the capacity of the facilitation team.

These are some of the ideas that we have tried out in the past:

- Individual or collective drawings or collages
- Group work in which specific questions are asked and the responses are shared in a plenary session
- Individual or collective narrative about the experience, or parts of it
- Added value, a plenary activity in which a group presents its work and then others add something to what they have shared.

When the workshop begins we recommend creating a photo or video display that reflects the past. This will help the participants to recall what happened. Another idea is to decorate the space with drawings and photos. This is interesting because it generates a warm environment and helps the participants to engage in the workshop topic.

What has been said for the interviews above is also valid for the workshops. It is important to let the other participants talk and bring out their perceptions of what has happened. The facilitator's only role is to formulate questions, and not to rate what has been said. This is particularly important, when the facilitation team is made up of the implementing staff, which happens most of the time. We have said above that emotions expressed by anyone need to be respected. Questions should be phrased in a way that does not lead to participants 'blaming each other' for things having gone wrong. It is helpful for the team to point out again that they ask these questions because they want to understand why things have happened the way they have; but not to assess others.

ORGANISING THE INFORMATION

The second part of the information retrieval process organises the information so that we obtain a general vision about what has occurred. This is very important because usually our "memories" are scattered and if we want to analyse them, it is important to organise them first.

We must recall the stages at which the experience developed. Breaks in the process or turning points often identify these stages - times at which abrupt changes in the course of the project occurred. This could include, for example, a change in strategy or in the field of operation.

The memories are then organised and structured into identified stages (all of the information that was previously collected). By incorporating the participants' varied perspectives, we are able to describe the project's development, which is then structured into different stages and seen as a total process.

Bear in mind!

We believe that the facilitation team can put this information in order. However, we recommend that once the information has been organised, the other participants should be consulted.

HOW TO DO IT?

There are different ways to organise the information. Below we have suggested some of the tools that we think work well. There are other ideas about how to organise the information in the bibliography of this manual. The tool(s) that have been chosen to organise the information should best be applied already at the time of retrieving the information.

Timeline

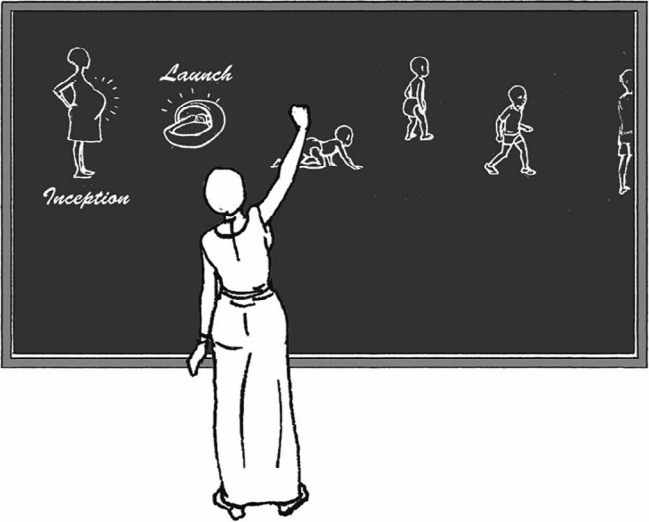
This is a graphic representation in which the most significant parts of the process are placed on a timeline. The timeline can better reveal the stages of the process. We advise creating a timeline for the process with smaller participant groups in the information retrieval workshops to determine what occurred during the process.

Usually, beneficiaries of projects focus less on particular dates or months, than do project implementers.

If participants do not remember an exact time that something happened, try to relate it to other events in their life at that time or the context. The important thing is to be able to see the process. Be creative!

Presenting the information

Maria de la Luz Morgan and Marfil Francke of the Development School in Lima, Peru propose the following table which can be used to organise information.



Dates	What was done	Why	Who	How	Outcome	Observations

The table can be useful to organise the information obtained in the previous stage (retrieval of the project's history) and to facilitate creation of a complete and "schematic" vision of the experience. However, we should adjust the table to the specific experience that is being systematised. We can include additional columns, modify or change the order, etc.

We have found the table to be particularly useful, when documenting activities that we have done, our practice. In addition, things that 'have happened' should be included as well.

We think that it is preferable to make large tables, for example wall papering an entire room. The information that is going to be organised in the table can initially be filled in by one person and then completed by the facilitation team.

Bear in mind!

- In this phase you tell the story of the experience. Be aware that it is easy to broaden the focus to other aspects and consequently work on more than what is necessary. Keeping the Framework in mind – or even better, on the wall – as you reconstruct the experience will help to control this risk.
- The idea is to report the real process, that is, what really happened, not what you planned or hoped would happen.
- You need to include the point of view of all actors involved in the experience that is being systematized. Different techniques can be used for that: individual or group interviews, discussion workshops, focus groups, etc. Don't forget to consider different power levels so that the voices of all people are heard.
- Include both objective facts (places, dates, number of participants, themes included in workshops, etc.) and subjective perceptions (opinions, feelings, intuitions etc.) of the actors involved.
- Give special attention to how things happened. If we want to understand the experience and learn from it then we need to give special focus to this, which is usually not highlighted enough in research processes and evaluations.
- Reconstruction must always consider the context in which the experience took place.
- It is useful to have the Facilitation Team or the project staffs prepare a first version of the reconstruction using the available documentation. This version can then be enriched with the other participants' memories, using the different techniques mentioned above (workshops, interviews, etc.).

STEP 4

THE CRITICAL ANALYSIS:

...we must dare to take a chance, propose and ask questions that facilitate knowledge-building and we must not fear the contradictions, because the history, our life, the reason for our knowledge and practices is full of them and it is because this paradox exists that we can sit down to dialogue.

Alfredo Ghiso²⁰

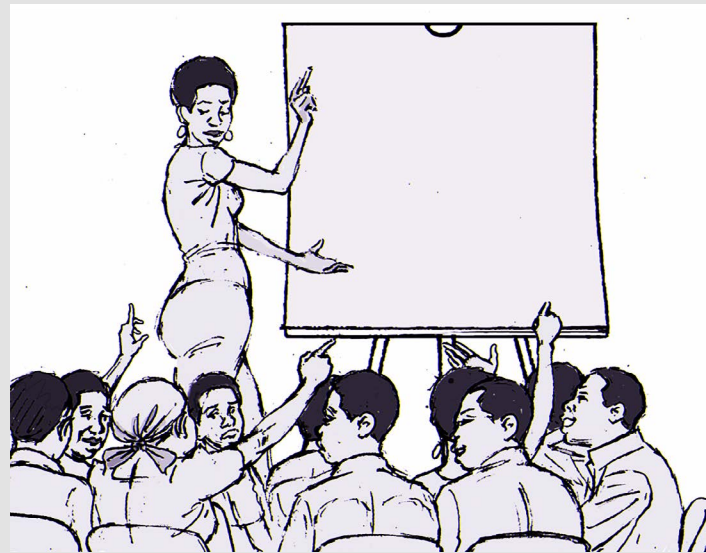
Up to this point of the systematisation process we have established the context and have put together a detailed description of our experience. This has been - as the word description already implies - a descriptive effort that included the different participant groups. Now, the decisive step in the systematisation process is to go beyond the descriptive, find the coherence and critical explanation of what has happened. To not only know **what happened** but to know **why it happened** . . . ²¹ and, of course, **how it happened**. Now we enter the chapter of critical analysis.

The critical analysis has three main components:

- Interpretation of the experience
- Analysis of significant elements
- Conclusions

When we systematise, it is difficult to separate the analysis of what was significant from the interpretation of the process we have experienced. There is a constant coming and going between these two components. Nevertheless, we have separated them in order to facilitate their explanation and understanding.

The third component of analysis - the conclusions - happens when the process has been profoundly analysed and understood.



INTERPRETATION OF THE PROCESS

Here the main idea is to conceive and interpret the experience in its totality - which includes the context in which the experience happened.

The first thing to do is to explore the process and to locate "points of change, or turning points". This means, we must look at breaks in the process - times, situations at which the route or the methodology changed. These are the moments of deep reflection that help us to understand why the changes occurred and what the consequences were. Remember the example of learning to ride a bicycle. We do things in our practice that we may not be able to describe explicitly but that change the course of things. We want to discover why we did what we did.

When we come across one of these changes or breaks we start to ask ourselves some questions, for example:

- *Why did we change at this point? What made us change? Who took the decision?*
- *What did these changes mean for our project?*
- *Was the outcome different after the change?*
- *Or whatever else you need to know, to understand how and why this has happened.*

It is important to dig deeply into this modification of the process from how it was initially planned, to really look behind the "change" - to try to profoundly understand why this change happened.

Marfil Francke and Maria de la Luz Morgan describe the interpretation in the following way: *At this stage of the systematisation, the objective is to explain what has happened. By bringing to light the new knowledge obtained during the experience . . . this phase ends when we are able to understand the process's internal logic and obtain a valuable lesson about what has happened.*²²

And do not forget the context! Sometimes changes happen because the context is changing - and, as already said before, we won't understand what was going on, if we do not include the context. We have to ask ourselves:

- *Was there any change of the context during the development of our project?*
- *How did the context affect the development of the project?*
- *Were some changes in the action a consequence of a changing context?*

We want to emphasise that the interpretation and the process of building new knowledge should be collective acts that belong to all of the participants of the systematisation process. As Bateson says, *the meaning or significance is built through interaction and is not in the head of each individual.*²³

We therefore recommend that the critical analysis should be done in a workshop with several people of the different participants' groups together (this would be ideal). Sometimes we have to organise several workshops - this depends on our experience. When different people, with different points of view are analysing their common experience together, this is very enriching.

In an agricultural extension programme, the project staff may be convinced that the way they train the farmers in applying new technologies makes them adopt the technologies. Some farmers may see things quite differently and have adopted the technologies after seeing them at an Agriculture Show. Others may have copied fellow farmers.

These different perceptions of the process will come out much clearer when doing the interpretation together.

Some people may find this difficult to do and rather disturbing. Implementing staff may want to defend what they have been doing. But if we want to understand why things happened the way they did and learn from it, it is very important to discuss differing views together. It is not enough to listen to the views of others and then go back and try to learn from it by ourselves.

Somebody once said this about meetings:

- *"I do not go to a meeting merely to give my own ideas. If that were all, I could write my fellow members a letter. But neither do I go to learn other people's ideas. If that were all, I might ask each to write me a letter.*
- *I go to a meeting in order that all together we may create a group idea, an idea which will be better than any of our ideas alone; moreover which will be better than all of our ideas added together.*
- *For this group idea will not be produced by any process of addition but by the interpenetration of us all."*

The same applies to systematising our work. Only if we discuss differing views together, we will be able to understand fully, why things happened the way they did. And what should be done differently next time.

And one last word - before we suggest some tools for this step:

Very often people start to evaluate, to judge the changes. To ask questions like: *Was it the right decision? Should we have done this differently?* These kinds of questions can be very "risky" and very "restraining" - as our interest should be more in understanding why things happened and what we learned from them rather than to judge them.

HOW TO DO IT?

Question guide

The first thing the facilitation team has to do for this step is to prepare the question guide. With the framework, especially the central aspects in mind, we list all the questions we have about the experience.

Some of the questions we may have to put aside, if we realise that they may not be answered through this systematisation (maybe a piece of research is needed instead). With these questions we try to find answers on why things happened the way they did.

ActionAid's Resource Pack²⁴ gives this example of an organisation's systematisation on their history and the development of leaders. In the critical analysis they asked these questions:

- *What were the most common motivating factors among the leaders in the beginning?*
- *Did they change?*
- *Why?*
- *How did the organisation's purpose change across the different stages?*
- *What were the main contradictions faced by leaders in the different phases of the organisation's development? How did they deal with them? Which of these still remain?*

Timeline

At this point the timeline is one of the most helpful tools to raise awareness of changes in the process, to establish the moments when the planned project underwent modifications – which for this step are the basis of our discussion.

If you have not made a timeline already, when retrieving the history – do it now, at this point of the systematisation process. And it is very helpful and interesting if the different groups who participated in our project make their own timeline. So, maybe we will have different and even contradictory timelines of our project – but this is a wonderful opportunity to dig in, to ask questions like: *Why do people see it differently? What generated these different perceptions?*

Work in small groups

We recommend working in small groups (4 or 5 people). Give the groups questions to discuss and to analyse. And then in the plenary, every group presents their outcome – when the outcomes are too contradictory, a new discussion is started – to understand why we have different points of view.

In this case we do not have to force one unique viewpoint – but we should at least understand why we see things so differently.

ANALYSIS OF WHAT WAS SIGNIFICANT²⁵

In reviewing and interpreting the information about what has happened in order to understand the process's internal logic, we see that not only were there stages or phases in our process, but we also detect that there are significant elements. These are “themes” or “subjects” that stick out – without them the experience could not be explained. We must now *break the process into these elements, discover the internal logic and understand the relationships that have been established between the different elements.*

Sounds very complicated – yes, but it only sounds like that, it's not so difficult. Let's look at this in parts.

A process has many significant elements - what are they? In systematisation we are interested in the elements that directly relate to the systematisation's central aspects, which were defined earlier.

*For example:
A grassroots organisation is systematising its experience of community leadership development. One of the central aspects is the application of methodology on leadership development. The elements that are part of the process might include:
The educational materials that were used
The methodological principles
The relationship between the leaders and facilitators.*

*Another example:
A feminist organisation is systematising its experience of working with women who are victims of violence, using collective workshops and personal one-on-one sessions. One of the central aspects is development of the women's self-esteem. The elements might include:
The workshops on building self-esteem
Dealing with interpersonal conflicts, etc.*

So – we can go back to our framework, going over our central aspects - and see what “important” elements we can detect in our “history” that have significant relevance for our central aspects.

Once the elements have been determined, we can analyse how they were developed as part of the experience and what changes and transformations occurred. We must also **conceptualise** the elements, based on the experience and enriched by theory, for example theoretical contributions from authors that have written about the subject.

Let us once again take the example of a feminist organisation. One significant element of their experience might be self-esteem building workshops. To describe this, we first explain how the organisation defines self-esteem and then analyse how this definition has influenced the workshops. We should then analyse changes and adaptations that have occurred and how they have affected the women. This helps us to understand why the changes have occurred.

HOW TO DO IT?

Question guide

Questions are the indispensable tool that we will need for our work in this phase. We will formulate critical questions that are challenging and allow for thought, reflection, understanding and taking a direct and concrete position in light of what has happened.

As we mentioned previously, the questions come from the systematisation's central aspects, which are defined in the framework. They serve to examine the process. The facilitation team can create a list of questions; however, the answers must come from the larger group of participants. This search for answers should be a collective process, preferably one that occurs in a workshop setting.

Bear in mind!

This is not the time to evaluate whether something went right or wrong or whether or not we met our objectives and expectations. What we want to learn is how and why the process occurred as it did.

CONCLUSIONS

The ultimate goal of a systematisation process is to improve and nurture our practice. It is not enough to analyse and interpret the process; we must reach conclusions about what was learned during the experience. These conclusions point to a new knowledge, for an improved practice which is nourished and enriched by the lessons that we learned from the experience.

Some of the questions that may help us to draw conclusions include:

- *What would we do differently if we started the project afresh?*
- *What part of the experience would we replicate, where would we make changes, what would stay the same and what would be adapted?*
- *What suggestions would we make to others who want to start a similar project?*
- *What were the difficulties, mistakes, good ideas, agreements, disagreements, generalisations, perspectives, etc. that we think are important to share?*
- *What made it possible to overcome the difficulties – what were our strengths in that moment? How did we cope?*

HOW TO DO IT?

“Added value”

The conclusions should be developed by the group and presented on large pieces of paper. Then each group can review the ideas and add additional ideas, writing in different colors. If necessary, there can be a plenary session that is used to arrive at a consensus.

Imagine an ideal process

A valid and very useful tool for this stage is to imagine an “ideal process.” Once we have flushed out “the entire experience” and we know which activities were good choices and which ones were not, we can imagine and elaborate an “ideal process.”

STEP 5

SHARING THE LESSONS LEARNED

*And this word,
this paper written
by the thousand hands
of a single hand
does not rest in you,
does not serve for dreams.
It falls to the earth:
there it continues*
Pablo Neruda²⁶

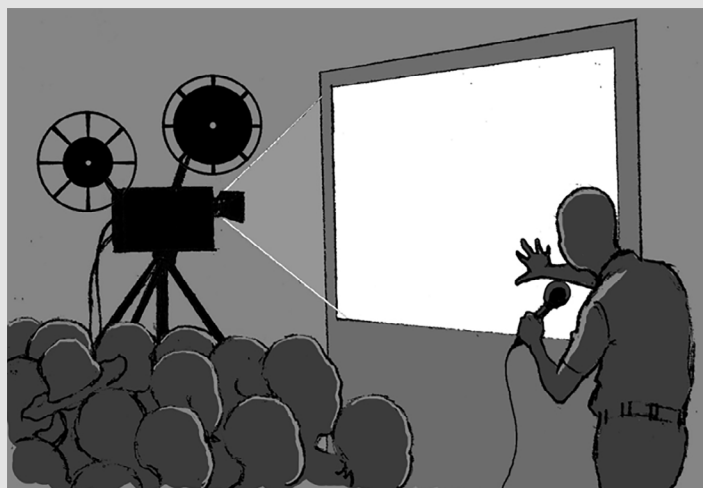
We now imagine that we are returning from a long, emotional and interesting journey; we have many memories, anecdotes, smells and tastes. What do we do at this juncture? We want to share what we have experienced with our loved ones.

Similarly, now that this journey through our experiences is almost finished, it is important to share our adventures, learning and lessons with others and create a record that describes the journey and the lessons that we learned.

There is a two-fold objective to sharing information about the systematisation:

First, it creates a document to share with those who didn't participate in the experience. We must reflect again on the results of the systematisation, clearly write up the text, explain the significant details of the process and context, and describe the experience and its results in a precise way. Those who write the text (the facilitation team) should fully understand and study their individual processes and the general experience.

Second: The results of a systematisation process are valuable and enriching because they are based on what happened in practice. It would be unfortunate (and, according to some, irresponsible) to only share the lessons learned with those who participated in the systematisation.



It is important to share the results with a wider audience. This is not a recipe book for other organisations so that they can imitate what we have done.

It is a process that nourishes and enriches the practice of those organisations and persons who work in a similar field. It will allow them to do the following:

- Learn about the experience that has been systematised
- Understand the reflections we have drawn from the experience
- Incorporate some aspects of our practice into their work, and
- Express objection when there is disagreement (based on reflection and well-thought-out arguments)

THE SYSTEMATISATION DOCUMENT

In order to document every aspect of the systematisation process, it is advisable to create a documentation detailing it. What should this systematisation document contain?

1. Introduction

- The motivation for participating in a systematisation process
- The need for the systematisation
- Introduction of the facilitation team

2. The systematisation process

- Briefly describe the systematisation process (we are talking just of the systematisation, and not yet addressing the experience itself)
- Share significant anecdotes that provide insight into the systematisation process
- Mention all of the people, organisations or groups that participated (other than the facilitation team)

LEARNING FROM OUR EXPERIENCE

3. The framework of the systematisation

Describe the landmarks

4. The context

Summarise the different contexts related to the experience

Describe the people who participated in the experience
Be explicit about the approach

5. The information that was retrieved about the experience

Share information about the stages and highlights of the experience

6. The critical analysis

Express and describe in a precise and understandable way how significant elements and reflections were conceptualised during the process

7. The conclusions

Write a summary of the conclusions that were drawn

8. Closing

Evaluate the systematisation process.

We believe that this systematisation document is like an internal report, meant for those who initiated and needed the systematisation. It forms the base for creating other sharing documents or products, depending on whom we want to share with. We need to consider language or wording as well as the means for sharing. Remember, we said when defining the framework, it may be useful to already think of the appropriate sharing product, right from the start.

Bear in mind!

In writing the systematisation document, it is possible to intersperse the analysis and information that was retrieved - in this way you will be telling the story and conceptualising what happened at the same time.

HOW TO DO IT?

Once the systematisation document has been written, it is important to find ways to share the lessons that were learned from the process. We can let our imagination run wild when creating formats in which to share this information. There are different ways to present the information and below we have offered three possible formats:

A printed text or document

Convert the systematisation document into a printed text and include photos, drawings, etc. that emphasise and give life to the text.

There are many **advantages** to this format: it is complete, easy to share with others who are interested and, additionally, it can be read as often and wherever one wants to read it.

The **disadvantages**: By communicating the information textually we run the risk of limiting the experience and for this reason it may not be very dynamic for the reader.

A radio programme

The **advantages** of a radio programme are many: it is accessible to those who don't know how to read, it is a lively format, it can include the voices and testimonies of the participants, and it is a mass communication that can reach many people.

The **disadvantages**: you need a radio or recorder and it cannot be heard everywhere. The production is not simple. Specialised technical skills are needed.

A story

- A narrated story can be used to share the systematisation process and outcome with people who find it difficult to read texts or are illiterate.
- By narrating the lessons learnt they can be shared with many people at the same time and questions can be answered.
- However, usually narrated stories are not recorded and cannot be used for reference.

Bear in mind!

If we are to communicate the results of the systematisation, it is important to identify with whom we are going to share the lessons learned. The format in which we present the work should be designed to "fit" the public to which it is directed. We need to consider language, wording or means of communication. A presentation or book aimed at a group of children would be different to that for a group of university-level teachers.

One last word about the Systematisation (Sharing) Document. Its aim is to share our experience with other organisations so they can enrich their practice with some of the lessons we learnt and were able to analyse and visualise through a systematisation process. But, and this must be clear, reading someone's systematisation document cannot replace having the experience. Or as our friend Escain Kiwonde from ACT Mara²⁷ so eloquently put it:

"There is a big difference between the person reading this [systematisation] document and the person who did the systematisation process. It is like the difference between knowing the path and walking the path". Escain Kiwonde

So, in essence: Use systematisation documents like you use a map - they give you an idea of the path you have to walk - the walking itself is up to you.

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