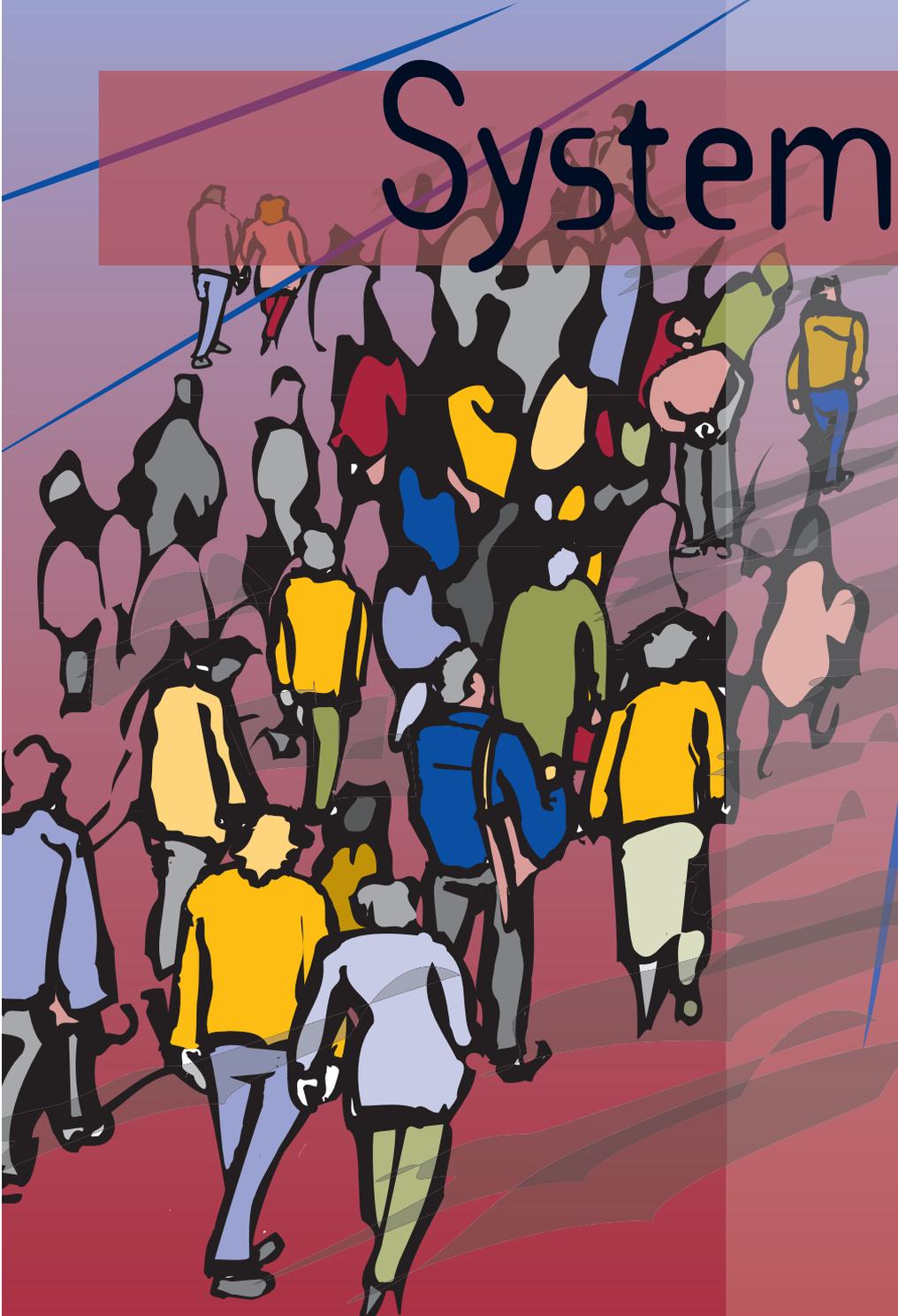


# Systematization,

a new look at  
our practices

Guide to the systematization  
of social transformation  
experiences



ALBOAN



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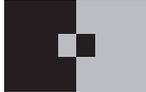


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# Introduction





## For whom is this guide?

**Everybody** involved in social action experiences increasingly face doubts and questions about our practices, as well as about our relationship and work with other people. Will our practices be the right ones at this moment? Why did this happen with this group and in a different way with another? Why did our action end becoming something that we were not seeking and produce unexpected results.

**To reflect on** and improve our practices in the sphere of social transformation, a methodological tool –systematization– is set out below and can be useful not only for our collective, but also for other people. It is a tool that can enable the group, alone or with other people, and can help them to reflect, question, learn and agree lines of actions for subsequent practices.

**It is not a “recipe”**, but rather a flexible and open proposal that has to be adjusted and adapted to the group according to its experience, timing, resources, etc., but which can help not only to improve our practices but also empower and help the people implied in the action to learn.

**Our aim is therefore** for this proposal to help to improve our practices in the field of social intervention, to empower those people with whom we are working and, therefore, to transform the world where we live.

## The reason behind this guide

**This guide** is driven by the concern expressed by many non-governmental organizations that work in the sphere, regarding the need to reflect and learn from the processes and practices of cooperation that have been fostered over the last decades.

**The impression** is that the day-to-day work and its emergencies leave little space for reflection and collective learning. And those reflection spaces that do exist often appear to be cut off from the specific practices. Therefore, the promoter organizations of this project have deemed it necessary to search for tools that combine the more practical character with the reflection process as such. During our search for methodologies that could combine both aspects, we came across the experience systematization proposal that has been mainly developed in South America.

**We believe** that currently and in our own context, this proposal may be useful for many social organizations.

## What can this guide contribute today and now?

**The commitment** to human development and social transformation in a globalisation context requires constant changes and adjustments to our practices. Yet these changes have to be driven by reflection and from a critical approach to the work carried out. In other words, previous experience has to be the element to provide us with guidelines to improve our practices.

**Understanding** the organisation processes has always been a challenge facing the social sciences. It continues to be so today and to affect the work and life of many people. The proposed methodology that is set out here can be a further contribution to help us to understand the social processes and the specific practices that we implement as associations. This is not only to understand them, but also to jointly analyse them collectively and generate new learning experiences.

**Therefore**, this guide considers a methodological proposal that facilitates:

- ◆ A collective and shared review of our practices.
- ◆ Appropriation by those that have experienced the experience.
- ◆ New learning.
- ◆ Clues to propose working alternatives that can be generalised.
- ◆ New knowledge that can help to link what is considered and the academic aspect with the specific practices.



# 1. About systematization

What systematization is





## 1.1. Definition of systematization

Defining a concept is always complex as it is difficult to capture in a few words all the nuances considered to be fundamental. Therefore, the different definitions of systematization provide us with clues to what it is and this can help us to better understand this methodological proposal, together with the rest of the guide.

### Systematising is...

- ◆ *Recording, in an ordered manner, an experience that we wish to share with other people, where the work is combined with the theory, and where emphasis is on identifying what has been learnt from this experience.*

Inter-American Institute of Human Rights

- ◆ *An ongoing and accumulative process to create knowledge based on intervention experiences in a social situation. It refers to types of knowledge based on intervention experiences. These have focused on popular development and education and seek to transform reality.*

Permanent Systematization Workshop

- ◆ *Systematization is the critical interpretation of one or various experiences that, using the technique of ordering and reconstructing them, discover or explain the logics of the experience, the factors that have intervened in that process, how they have interrelated and why it has been performed in that manner.*

Oscar Jara

- ◆ *An alternative to the traditional evaluation used for social and educational projects. It is also presented as a response to the insufficiencies of prevailing social research to analyse the problems that reveal social intervention and change projects.*

Sergio Martinic

- ◆ *An intentioned process to create practical and theoretical knowledge based on participation, from and regarding emancipator transformation practices. It is proposed that it is the best way to achieve its ends, which are to contribute to the increasing development of the strength and the capacities of the popular sectors. Therefore, as collective subjects, they can play a real role in identifying and resolving their needs and desires, both with respect to the day-to-day and the past, while overcoming the subordination mechanism and relations that challenge this transformation.*

Felix Cadena

- ◆ *From our perspective, systematization is the critical interpretation of an experience, which is ordered and reconstructed to discover or explain the logics of the process experienced, the factors that have intervened in that process, how they have been interrelated, why that has happened and to use this to build new knowledge.*

Human Development Experience Systematization Project

Nonetheless, it should be pointed out that there is no agreed definition about what systematization is. This can add confusion as far as understanding the concept is concerned, but it also opens doors for us to put forward our own contribution. This “non definition” has allowed the emergence of different “schools” or social approaches that we consider to have certain common concerns and goals: **learning from our practices.**

## 1.2. Characteristics of systematization

In the same way as when defining systematization, there is a variety of opinions where considering its main characteristics. However, we have identified a series of characteristics that are common to any systematization exercise. Before listing them, it should be pointed out that practice must precede any systematization. Systematization cannot be performed if there has not been an experience.

Once the practice has taken place, systematization is a participative process that allows what has happened to be ordered, and thus stimulate memory recall, interpret it, learn from it and share it with other people.

### a. Process

Systematization implies having a pre-established route to carry out a process on which it is going to be build. This systematization process is as important as its result. It is therefore necessary to take into account what systematization is:

- ◆ A construction process where there is a route.
- ◆ The process and the outcome are both of interest.
- ◆ Therefore, it is a process open to contributions and the development of the group.
- ◆ It helps us to discover the logics used to implement process, along with the activity to be systematised (factors, relations, etc.).

## b. Participative

Systematization is, by definition, a method based on participative dynamics. This implies that a work space has to be created where the opinions based on the trust of the participants are shared, confronted and discussed. Its participative character enables and is enabled insofar as:

- ◆ Those who have participated in the experience are subjects of the systematization.
- ◆ A work space based on the confidence of the people is created.
- ◆ A space is generated where to share, confront and discuss the opinions of the subjects.
- ◆ It is assumed that any systematization process is an interlocution process between people where cultural constructions, theories and discourse are negotiated.

## c. Order

Systematization implies an organisation exercise, based on a logical order, of facts and knowledge of the experience. This form of ordering allows the experience to be critically considered. The following is therefore necessary:

- ◆ An ordered record of the facts.
- ◆ The process has to be ordered and reconstructed.
- ◆ The disperse knowledge and scattered perceptions that emerge during the experience have to be ordered.

#### d. Memory recall

A systematization process enables the history of the experience to be recalled and keeps its memory alive:

- ◆ It ensures the emphasis is placed on memory recall and facilitates access to it as a method of mainstream work.
- ◆ It stimulates memory recall.
- ◆ It critically reviews the practices.
- ◆ It allows the specific practices to be understood as dynamic and historical processes.

#### e. Analysis and interpretation

This is one of the basic components for all systematization. Once the memory recall has taken place and is ordered, it needs to be interpreted in order to be able to objectify the experience and thus extract what has been learnt. The critical interpretation supposes the following elements:

- ◆ Any person is a knowledge subject and has a perception and a knowledge that is the outcome of its experience.
- ◆ What has been experienced needs to be objectified: the experience itself is converted into an object of theoretical interpretation and study, and thus becomes an object of transformation.
- ◆ It implies reflection over practice.
- ◆ It implies considering it in the framework of a specific context: a critical interpretation of a practice inserted in a reality and specific context.
- ◆ It analyses development processes through specific spaces.
- ◆ Attention needs to be paid to the experience and to the interpretations of any participation in that situation or process.
- ◆ A balance must be maintained between practical and theoretical aspects.
- ◆ It is a professional and technical work committed to the transformation and substantial democracy with qualitative and also quantitative scientific variables.

## f. Learning and new knowledge

The main benefit from systematising experiences is the learning and incorporation of new knowledge. The knowledge that is acquired is obtained from the practical experience itself, which makes the learning process even more useful. One of the purposes of acquiring this knowledge is to incorporate it into our practices to be able to continue with our social transformation work. This learning process must enable us to:

- ◆ Conceptualise our experiences, in other words, to produce knowledge from reality.
- ◆ Reveal what “we still did not know and we already knew”.
- ◆ Produce useful knowledge.
- ◆ Produce new knowledge that allows what is being done in each specific case to be abstracted and to find a fertile area where generalisation is possible.
- ◆ Learn from practice and from other organisations.
- ◆ Improve our practice.

## g. Sharing and disseminating

In the same way as in the majority of knowledge acquisition processes, power sharing with those people working in the same sphere of the systematised experience is highly useful as:

- ◆ The information has been organised in order to transmit an experience to other people and these can use it in a future.
- ◆ Its purpose is to share and compare a learning process.
- ◆ It can also strengthen the identity of the organisation itself and sense of belonging to it.
- ◆ It allows the experience in question to be shared with other organisations.

## 1.3. A historical overview of systematization

### Emergence of systematization

There are people who trace the beginning of systematization back to the Fifties to the work of the Social Service and Social Sciences Academy in Latin America. At that moment and according to that group, systematising meant recalling, ordering, specifying and clarifying social service contents to give them a scientific nature.

In any event, systematization as described in general in the previous pages emerged in Latin America in the Seventies and in the organisations that worked in the sphere of popular education.

These organisations acknowledged that they implemented interesting educational projects and that little remained of them with the passing of time. The concern emerged from a desire to capture and learn from the experiences performed, using the people involved in them. It was formulated as systematization as it fundamentally aimed to recall the experience and perform a critical analysis with the people involved, which would lead to new knowledge being obtained.

This methodology and means to understand the systematization was highly developed in Latin America over those years. Special emphasis was given to it by the Participative Action Research Methodology (PAR), the social work university schools, as well as the CEAAL (Latin American Adult Education Board),

During the Seventies, it was widely developed which enable the term to be determined, along with the methodology and tools to be applied. It was a time of proposals and experiences that were mainly linked to popular education.

Nonetheless, from then to the present, some moments were more decisive than others and this enabled systematization to be developed along different paths and be materialised in different proposals. That journey is summarised below.

### Development of systematization

In the Eighties, conditioned by the new socio-political context of the different Latin American countries, the development of this proposal slowed down both at the level of the social workers and the academic world.

However, in the Nineties, with the emergence of new cooperation project techniques (such as the participative rural diagnostics), popular education methodologies and tools began to be developed in these spheres. Thus, systematization left the sphere of popular education and began to be developed in the sphere of rural development, community, etc.

Systematization began to be linked to other methodologies, such as community diagnostic techniques, participative planning, illuminating assessment, etc. During the 90s, and still in Latin America, this enabled adaptations and new systematization experiences in different spheres to be developed. We will next spotlight some of these currents, but it should be pointed out that the debate swung between prioritising academic aspects and the production of new knowledge, and the descriptive and the characterisation of specific practices typologies.

In any case, it has become clear that there are various systematization levels depending on to the objectives, target population, utility, etc., that marked its contents.

### **The “rediscovered” systematization**

At the end of the Nineties, systematization began to be discussed in the “North”. However, the term was sometimes used only to talk about memory or data collection.

Nonetheless, the concept that considers specific methodology and tools to learn about the experiences came from people working in the field of popular education.

This proposal arrived at a time when development education and development cooperation practices were being questioned, along with other intervention initiatives in the sphere of social transformation. It was the same time where the quality and the improvement processes were becoming well established not only in companies, but also in non-governmental organisations and social entities.

In this context of questioning and the search for tools to improve social intervention work, systematization methodology was once again seen as being attractive. The interest in experience systematization therefore began to be “rediscovered” in the North and in the South.

The debate is currently focused on the relationship of systematization with other processes and tools, such as preparing reports, research and assessments (aspects that are covered in subsequent pages).

We thus have a proposal that is open and under permanent construction. We encourage the organisations and people interested in sharing and contributing their experiences and work on this proposal that still has some areas left to be debated:

1. **Theoretical and epistemological consolidation.** This debate is based on questioning whether “academic” knowledge can be obtained from systematising one or several experiences; if theory can be established using one or several one-off cases.
2. **Methodological proposal.** Debate about the participative methodologies and the qualitative techniques and their capacity to describe a situation with certain rigour. The importance that the process has in this proposal was also discussed and considered to be as important as the result.
3. **Participation and empowering.** The discussion was on how to collect contributions from all the people involved in the experience to be systematised and how to weigh its importance in the framework of a context and a specific reality.
4. Debates about the danger of **reducing** the methodological proposal to an instrument to spotlight the funded projects. This would include all the participant voices, but without the people involved learning or being empowered.

#### 1.4. The whys of systematization

As was pointed out at the start of this guide, we fundamentally systematise as we want to learn from our practices and, also because we are looking to:

- ◆ Acknowledging what has been carried out.
- ◆ Recall what has been implemented.
- ◆ Analysing and acknowledging not only the failures, but also the advances achieved and also the critical points that we have come across.
- ◆ Analysing specific processes in the framework of a wider context. Learning from practice.
- ◆ Generating new knowledge from the practice itself.
- ◆ Improving our practice.
- ◆ Progressing in our work in the field of social transformation.

## 1.5. The wherefores of systematization

- ◆ To improve our practices.
- ◆ To generate learning.
- ◆ To create new knowledge.
- ◆ To communicate and share them with other people and organisations.

Nonetheless, we will now look at how different schools and practices emerge according to the characteristics of the systematization we prioritise. On the following pages, we will highlight how each proposal prioritises one aspect over another by means of the graphic representation (in different sizes) of the following aspects:



Dissemination



Learning



Interpretation



Analysis



Order/Historical  
Memory



Participative  
Character



Process.

## 1.6. With whom to systematise

There is a far-reaching debate not so much about who, but rather to what extent each group related with the experience must participate.

It is generally agreed that all the people involved in the experience must participate in the systematization. Those are the people who directly experienced it, or in other words:

- ◆ beneficiaries or
- ◆ promoters/facilitators

These people play different roles in the experience, but they all must have something to say in its analysis and critical interpretation. Depending on which “school” or “current” we follow, their participation will be in one or another way, which we also reflect graphically:



Promoters



Beneficiaries

Also depending on the systematization goal and the group situation itself, the participation of people from outside the institution or the experience to be systematized may be an enriching or limiting aspect. There is no clear consensus in this respect, even though it is true that many of the experiences involved outsiders that acted in an advisory role and helped to focus the topic and raise questions or guidelines to progress in the process.



## 2. Different approaches

Systematization focuses





As we have already seen in the previous section, groups have fostered different approaches towards developing systematization, in response to different specific needs.

**Historically, systematization** in Latin America has developed differently due to its link with:

- ◆ Popular education.
- ◆ Participative Action Research.
- ◆ Social Work schools.

The differences in styles or currents have fundamentally been due to the emphasis given to the priority systematization goal.

- ◆ Fostering the exchange of experiences.
- ◆ Having a greater understanding of the work itself.
- ◆ Acquiring theoretical knowledge based on practice.
- ◆ Improving practices.

As well as according to the object to be systematised:

- ◆ The practices of the educators.
- ◆ The practices of the popular groups.
- ◆ The relationship between educators and the target population.

Nonetheless, with its development in the current field of social organizations, we find that systematization is a methodological proposal that is in a space between:

- ◆ Preparing project reports and/or intervention experiences.
- ◆ Assessing experiences.
- ◆ Research based on the experiences.

We shall next try to establish the different or common aspects between these currents or schools.

## 2.1. Traditional approaches

### 2.1.1. Systematization and popular education

The Red Alforja, a network of popular educators in Central America, have most developed and have maintained the contact between systematization and popular education.

Its approach puts forward a model based on the following steps:

- ◆ The starting point.
- ◆ The initial questions.
- ◆ Recalling the process.
- ◆ In-depth reflection: “Why did what happen, happen?”
- ◆ The arrival points.

From this perspective, the fundamental emphasis is on learning from the practices linked to a specific context and not so much on preparing knowledge.

As far as the participants are concerned, the fundamental key players of this systematization are the “beneficiaries”.

As this is the model basically followed in this guide, we will subsequently consider it in detail in the practical study.



Interpretation



Order/Historical  
Memory



Learning



Dissemination



Analysis



Participative  
Character



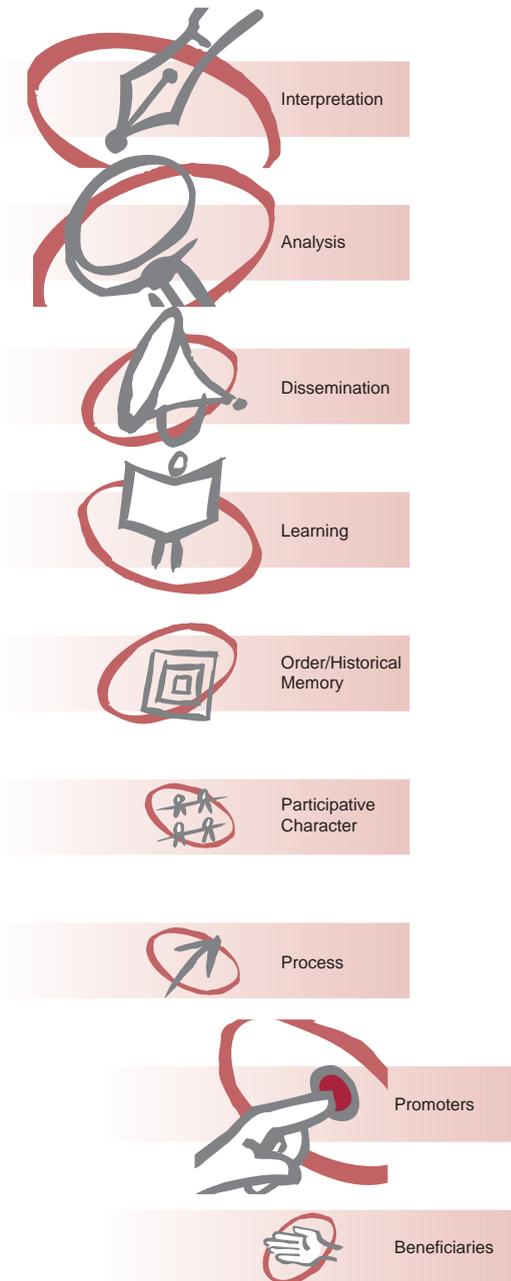
Process



Beneficiaries



Promoters



### 2.1.2. Systematization and social work

Since the early days of systematization, this methodology has been interrelated with social work. Systematization was considered to be an ideal space to learn from practice.

For these groups of people, active in the field of social work, systematising meant recalling, ordering, specifying and clarifying the knowledge of social services to give it a scientific nature.

Research and systematization became complementary insofar that some schools and Universities considered systematization as a research methodology. That is currently the case of El Valle University (Cali, Colombia).

Therefore, the people who make up Peru's Permanent Systematization Workshop have been most active in this sense.

They consider systematization to be an analytical reflection and reconstruction process about a personal development experience (or about specific aspects of it), by means of which we interpret what happened, to understand it. *This allows a sustained and consistent product to be obtained. The product can be used to disseminate the experience, compare it to others and to the existing theoretical knowledge, and thus contribute to an accumulation of knowledge generated from and for practice.*

This proposal fundamentally focuses on the production of knowledge and has been applied in numerous social intervention organisations in Peru.

The phrases of their proposal (currently under review) are:

## 1. Designing the systematization project

### ◆ *The wherefore of systematising that experience*

- What knowledge is expected to be obtained, what is the expected benefit, for whom is it useful?
- Set the main question(s) that the systematization wants to answers (core or input of the process).

### ◆ *What is to be systematised*

- Marking out the experience that is going to be systematised: all, a part... (analysed to a greater or lesser extend).
- It depends on the proposed goals (initial question).

### ◆ *How we are going to implement the systematization*

- Selection of methodological proposal (open).
- Operationalisation of the systematization (who and how they participate, timescale, resources...).

Preparing the Systematization Project document (outline):

- Fundaments: what the experience consists of and why systematise it.
- Systematization goals: what they expect to reach, in terms of products and processes, learning, etc.
- Methodology: presenting and substantiating the chosen method, describing the tasks, responsibilities, etc.
- Resources: time, materials and financial resources required.
- Timeline: sequence of the tasks, key moments, presentation of the products, etc.

## 2. Process recall

- ◆ *Description of the experience*: where and when it took place, what players were involved, with which goals, what results were obtained... It is an ordered approach to the practice.
- ◆ *Recovery of the development of the process*: the fullest possible, given everything that occurred (not only what was scheduled), taking into consideration of all the points of view of the various participants in the process (team as a whole and beneficiary population).

Considerations:

- It is performed based on a diversity of information sources (project, programming, reports, assessments, different records, memory...).
- It uses instruments, guides that facilitate the reconstruction.
- It accompanies the reconstruction of the experience with its contextualisation.

## 3. Analysis of the process

- ◆ Breaking down the process into the elements that make it up, in order to understand its internal logics and understand the different relations.
- ◆ The process then moves on to conceptualising: the theories handled, reflection about the practice and compared it to theoretical readings.
- ◆ The fundamental instrument is to put questions that arise from the goals and core points of the systematization, in an ordered manner: operationalisation of the systematization questions.
- ◆ The analysis ends with the reordering of the information needed to answer the questions.

#### 4. Interpretation of the process

- ◆ The goal is to explain the experience, highlight the new knowledge obtained during the experience. This was achieved by answering the questions raised at the time of the analysis, taking into consideration and studying all the information available. It is an ascending process, until reaching the questions that is the goal of the systematization.
- ◆ The systematization ends when we manage to understand the internal logics of the process and obtain valid learning in relation to what happened which should translate into greater knowledge that will direct us to further intervention. Therefore, the conclusions of the systematization must be expressed as learning experiences and, where possible, as recommendations for new interventions. Another final product may be the formulating of the new questions to lead to new processes.

#### 5. Exhibition

- ◆ The aim is to set out the process and the results obtained from the systematization. It should be possible to use different formats and communication media.

### SYSTEMATIZATION PROPOSAL SUMMARY

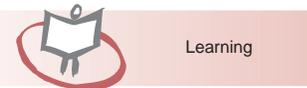
	CELATS (1985)	Permanent workshop CEAL-PERU (1988)	School for Development (1991)	Oscar Jara, Alforja (1994)
<b>Target</b>	Social workers.	Popular educators and promoters.	Promoters.	Popular educators and promoters.
<b>Systematization theoretical and practical systematization to</b>	Method that includes produce knowledge based on the experience. Investigation method whose knowledge purpose is an experience in which it was used.	Ongoing and accumulative process to create knowledge based on the intervention experiences in the social reality. First level of theorisation regarding the practice.	Reconstructing and analytical reflection about an promotion experience, distinguishing between correct answers and errors. Contrasting and accumulating systematizations will enable the preparing of intervention methodological guidelines.	Critical interpretation of one or various experiences that, based on their ordering and reconstruction, discover or explain the logics of the experience lived, the factors that have intervened in that process, how they have interrelated and why it has been performed in that manner.
<b>Targeted goals</b>	Improving the practice of the social worker. Contributing to similar experiences. Contributing to the production of knowledge scientific from individual and day-to-day.	Improving the intervention from which it is highlighted. Enriching, challenging, changing existing theoretical knowledge, changing it into a useful tool to transform reality.	Obtaining a common vision (in the team) about the experience. Transmitting and comparing experiences, in order to construct a theory and methodology of promotion.	Greater understanding of the experiences, aimed at improving practices. Sharing with other similar practices the teaching arising of the experience. Contributing to the theoretical reflection and to the theoretical construction, knowledge arising from specific social practices.
<b>Such as systemising</b>	<ol style="list-style-type: none"> <li>1. Recovering and ordering of the experience.</li> <li>2. Marking out of the purpose and goals of the systematization.</li> <li>3. Recovering of the experience from the purpose.</li> <li>4. Analysis: operationalisation of the questions. and recovering of the information.</li> <li>5. Synthesis: answer to the questions.</li> <li>6. Exhibition.</li> </ol>	<p>Two systematization levels.</p> <p>First level: interpretation of the process as a whole.</p> <ol style="list-style-type: none"> <li>1. Designing of the project.</li> <li>2. Recovery of the process</li> <li>3. Periodisation of the process – Analysis</li> <li>4. Interpretation of the process.</li> <li>5. Exhibition.</li> </ol> <p>Second level: going into some of the dimensions of the process in greater depth.</p> <ol style="list-style-type: none"> <li>1. Demarking the purpose and objective of the systematization.</li> <li>2. Designing the project.</li> <li>3. Reconstruction of the experience from the purpose.</li> <li>4. Analysis: explanation of the hypothesis, periodisation of the experience, formulating questions at each stage and throughout the process.</li> <li>5. Synthesis: answer to the questions.</li> <li>6. Exhibition.</li> </ol>	<ol style="list-style-type: none"> <li>1. Demarking the experience to be systematised (time and space) of the purpose and objectives.</li> <li>2. Description of the experience to be systematised.</li> <li>3. Ordered record of the experience (timeline table).</li> <li>4. Periodisation and standardisation of stages of the process.</li> <li>5. Analysis and conclusions.</li> <li>6. Publishing.</li> </ol>	<ol style="list-style-type: none"> <li>1. The starting point: <ol style="list-style-type: none"> <li>1.1. Having taken part in the experience</li> <li>1.2. Recording the experience</li> </ol> </li> <li>2. The initial questions: <ol style="list-style-type: none"> <li>2.1. Why do we want to systematise? (defining the goal)</li> <li>2.2. What experience do we want to systematise? (demarking the purpose)</li> <li>2.3. What central aspects of those experiences are of interest to systematise? (specifying a systematization core)</li> </ol> </li> <li>3. Recovering the process experienced: <ol style="list-style-type: none"> <li>3.1. Reconstructing the background</li> <li>3.2. Ordering and classifying the information</li> </ol> </li> <li>4. In-depth reflection: Why did what happen, happen? <ol style="list-style-type: none"> <li>4.1. Analysing, synthesising and interpreting the process critically</li> </ol> </li> <li>5. The Arrival Points: <ol style="list-style-type: none"> <li>5.1. Reaching conclusions</li> <li>5.2. Establishing what has been learnt</li> </ol> </li> </ol>

Source: FRANCKE, M. MORGAN, M.L.: *La sistematización: apuesta por la generación de conocimientos a partir de las experiencias de promoción*. Educational Materials No. 1, School for Development, Lima, 1995.

### 2.1.3. Systematization and Participation Action Research

One of the proposals linked to the research that is currently being considered within the university framework is the Popular Education Research Group of El Valle University (Cali, Colombia). This interdisciplinary group and its methodological proposal stress the importance of interpreting the experiences.

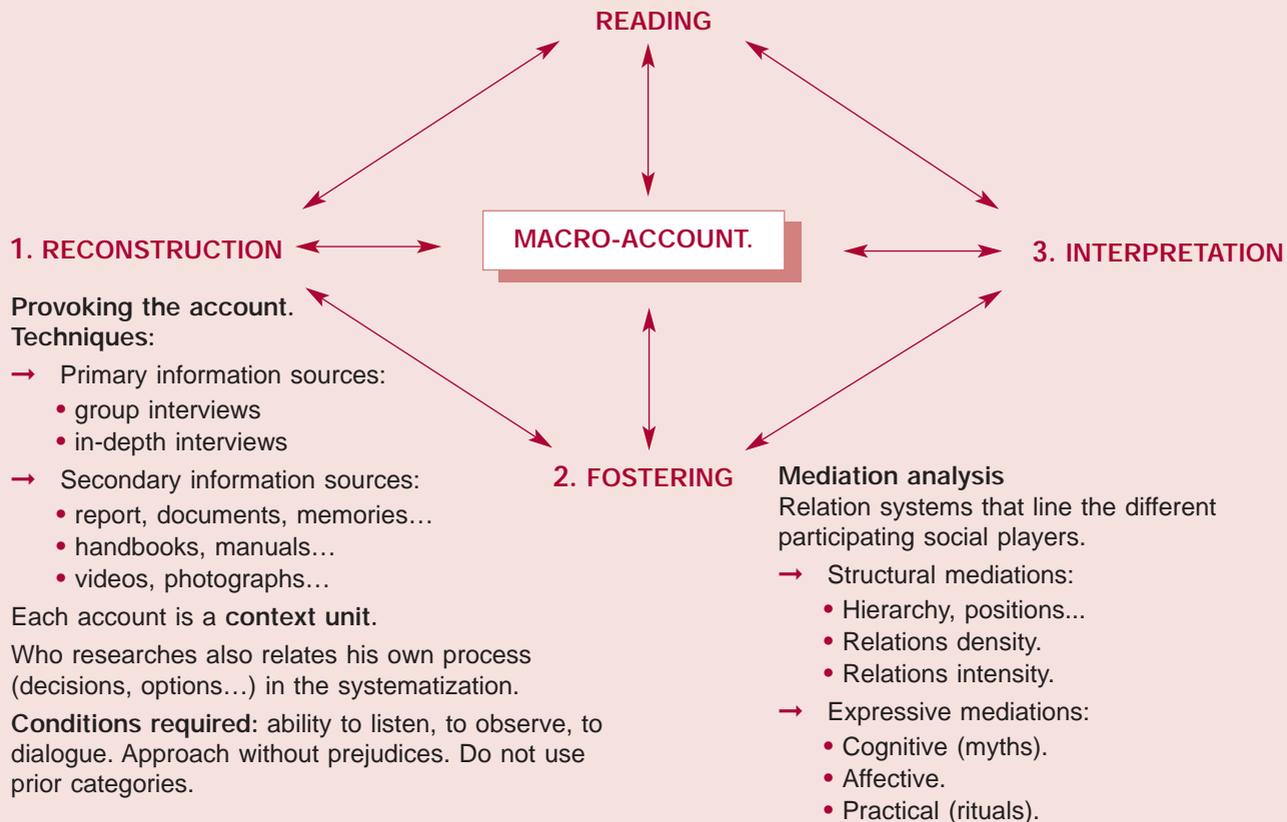
From its perspective, the methodological nucleus lies in constructing accounts about the experience and carry out interpretative readings of those accounts in order to prepare an “agreed account framework”. Special importance is given in its approach to the nature of the research which is fundamentally:



**PHASES OF THE SYSTEMATIZATION PROCESS**  
**Model of the Popular Education Research Group (El Valle University, Cali)**

- They are not sequential steps.
- They are intimately interrelated.
- The cluster that links together all the steps of the process is the macro-account.

1. **Extensive** > thematic clusters.
2. **Intensive** > analysis categories: a semantic field that gives meaning to the topics.
3. **Comparative** > the intensive readings are related: the dynamics of the social players emerged.



Source: prepared using the documentation of the Popular Education Research Group.

Another proposal based on similar grounds is the one developed by the CIDE, mainly in Chile. This organisation put forward three steps or moments for a systematization process:

1. Analysis of the contextual aspects that structure and impact any practice.

The aim is to construct a scenario that allows the processes and interactions developed as the outcome of an experience to be understood and filled with meaning.

2. Explaining the suppositions that are the basis for and organise the proposed action.

The aim is to reconstruct the logics of the social practice through action hypothesis that take into account the “commitments” and “searches” that fundamentally drive educational activities. The interpretations and prevailing feelings are analysed to build an interpretation that expands what has been experienced into a more generalised approach.

3. The emphasis returns to the action to reconstruct this in a specific time and place.

The aim is to analyse the overall mediations that range from the birth of an idea or proposal to its implementation (from the “ideal” project to its realization in a “development” and specific “results”).

In both proposals, the priority pendulum tips towards the interpretation by the participants in the project.

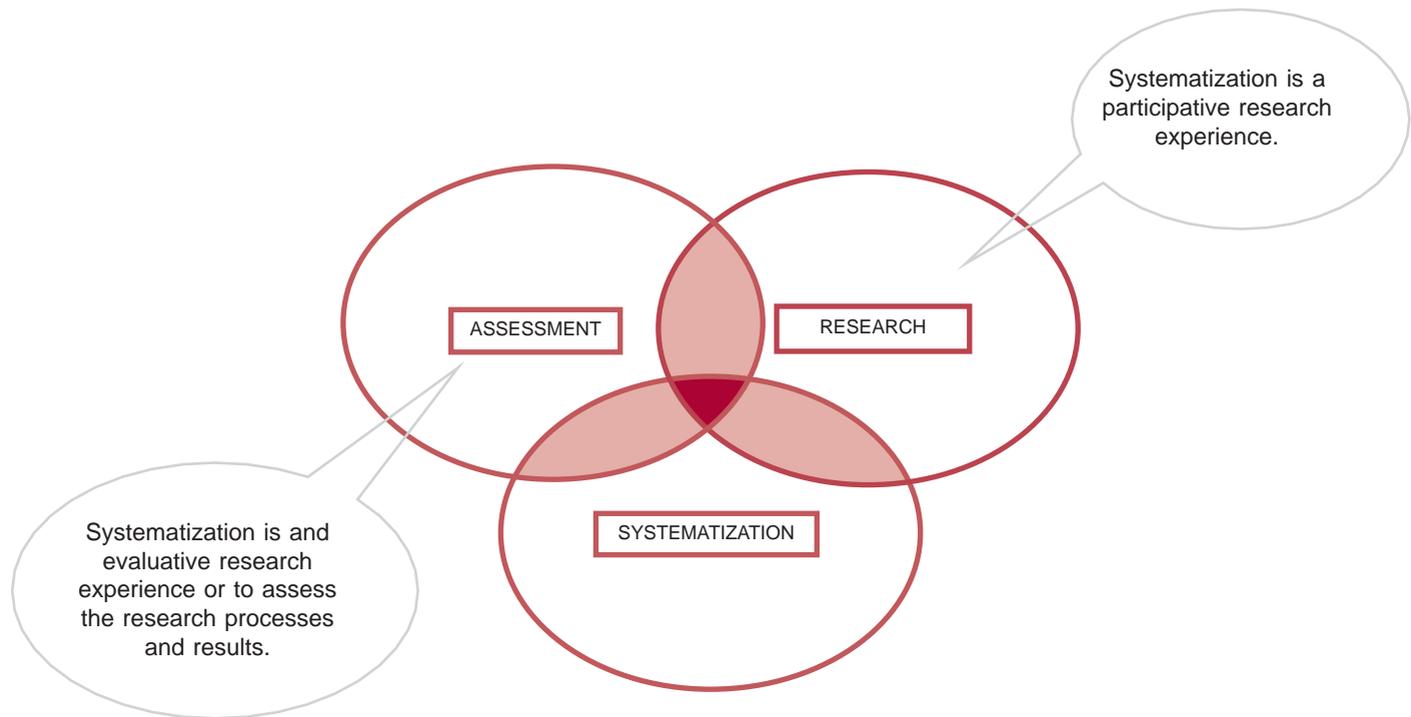
It should be pointed out that these proposals have been characterised as “systematizations of systematizations”, which has allowed them to share different experiences with some common elements and thus extract new learning processes that can then be generalised.

## 2.2. Contemporary Approaches

Current systematization is discussed in a space where theory can be linked with practice. Therefore, it is on the borderline between other proposals that enables us to learn about the situation, with respect to:



And, as we can see in the following figure, there are areas in common with research and assessment, but which also have their own space.



### 2.2.1. Systematization and Research

Systematization shares with research the fact that they are both knowledge processes. Systematization, without being research in the strict sense of the word, is a method of the latter that aims to conceptualise based on practice or practices.

The object of knowledge is an aspect of the reality that we want to understand in order to be able to intervene in it. Systematization tackles a process or some of its dimensions, based on planned and intentioned practice.

The work of Colombian groups, such as the National Pedagogical University or Educational Dimension comes under this line of work.

They consider systematization is a research proposal *taken to be a collective knowledge modality, regarding social action and intervention practices that aims to strengthen them and help to conceptualise the relevant field based on the critical interpretation and acknowledgment of the senses and logics that constitute it.*

Some of the features that characterise this systematization proposal are as follows:

1. It is an intentioned knowledge production

At the epistemological level, a position that is aware of from where, why and how the social knowledge occurs.

2. It is an collective knowledge production

The very social players take the main decisions of the research: the what, the why, the wherefore and how to achieve it.

3. It acknowledges the complexity of the social action practices, the object of the systematization

It is conditioned by the contexts, relations, meaning construction, production of effects that are envisaged or not, etc.

4. Seeks to reconstruct the practice in its density

The aim is to produce a descriptive account of the experience from the dialogue of approaches and know how.

5. Seeks a critical interpretation of the logics and meanings that build up the experience

In addition to reconstructing the experience, it aspires to depict its own specific logics, of the meaning that construct it.

#### 6. Seeks to foster social intervention practice

It is based on a pragmatic interest: Improving the practice.

#### 7. It helps to conceptualise social practices in general

It seeks to understand the meanings that make up social practices, and from there, prepare interpretation outlines that allow the social aspect to be understood: the balance of various systematizations on a single practice field may generate more far-reaching theoretical reflections.

And the phases forming part of the systematization process from that perspective are:

1. Generating conditions to implement the research.
2. Reconstructing the past track record of the experience.
3. Analysis and interpretation of the experience.
4. Final synthesis and pooling of the results.

### 2.2.2. Systematization and Assessment

The assessment is noted for being focused on the project and, specifically, on its goals and results. On the one hand, systematization aims to go further into some dimensions of the process including the project, focusing on the link between the professional practice and that of the participants.

Nonetheless, the assessment is now going to expand both what is measured and when it is measured. Despite this, there are important differences such as those set out in the following table:

	Assessment	Systematization
<b>Aim</b>	<ul style="list-style-type: none"> <li>• Measuring the results of a process.</li> <li>• Comparing the results with the goals, challenges and proposed outcomes.</li> <li>• Recommend for future actions.</li> <li>• It is focused on simpler processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Generating knowledge based on experience.</li> <li>• Obtaining lessons to dialogue with other experiences.</li> <li>• Sharing, learning and improving the processes.</li> <li>• It is focused on more complex processes.</li> </ul>
<b>Emphasis</b>	<ul style="list-style-type: none"> <li>• Places special emphasis on comparing the results with the objectives, challenges and proposed actions.</li> <li>• The logics is partial.</li> <li>• Tendency to objectivity.</li> </ul>	<ul style="list-style-type: none"> <li>• It is proposed to reflect about the experience developed, from a connecting thread or reflection core point.</li> <li>• Finding cause and effects that influence a process.</li> <li>• In-depth reflection.</li> <li>• Disseminating the experiences.</li> <li>• Interpreting the logics of the process.</li> <li>• Logics are circular, systematics, complex.</li> <li>• Integrates the subjective dimension.</li> </ul>
<b>Who implements it</b>	<ul style="list-style-type: none"> <li>• The players are not necessarily involved.</li> </ul>	<ul style="list-style-type: none"> <li>• The players must be involved.</li> </ul>
<b>Products goals</b>	<ul style="list-style-type: none"> <li>• Valuation of the scope of the expected.</li> <li>• Acceptance of the techniques.</li> <li>• Determining the cognitive effects.</li> <li>• Defining how the work is to be monitored and validated.</li> <li>• Communication is aimed with greater emphasis on the direct players of the process.</li> </ul>	<ul style="list-style-type: none"> <li>• Learning, conclusions, lessons, communication products, video, document, stories, etc.</li> <li>• Communication transcends the direct players.</li> </ul>

Source: Polygone (International Education Network for Popular Education and Development): Educational Mosaic to leave the maze, Vitoria-Gasteiz.

### 2.2.3. Systematization and Memories and Reports

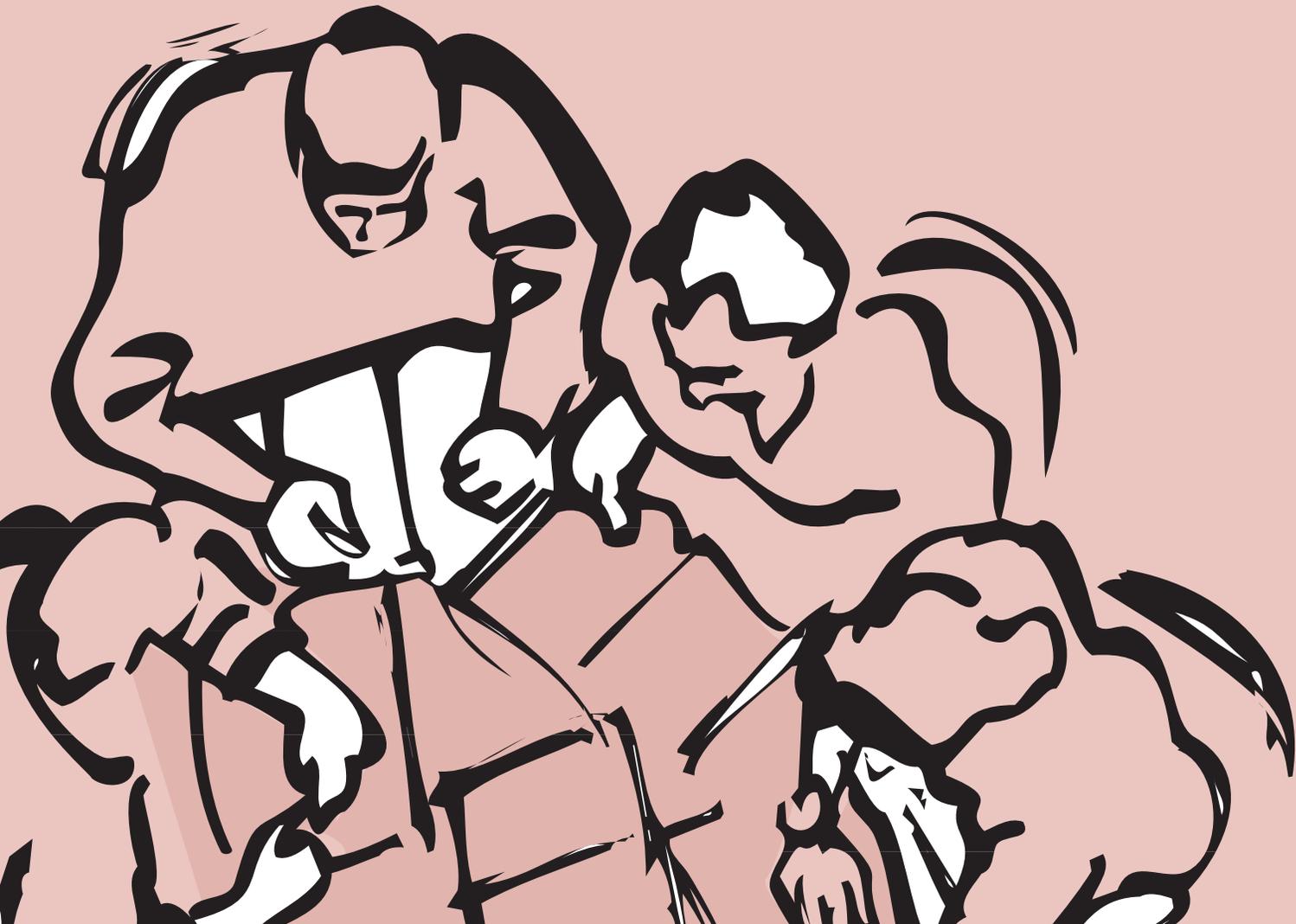
One of the results of the systematization is the presentation of a narrative document. As has been previously said, the outcome is as important as the process in systematization. Therefore, the systematization cannot be reduced to a report or memory that recalls and describes an experience. The whole process in itself is as important as the final result that may or may not be set out in a report.

In addition to this, the reports or memories of experiences are limited to chronologically describing the fact. In the case of the systematization, however, the resulting report or document should synthetically describe what happened, but also the "why did what happen, happen", apart from highlighting the lessons learnt and the recommendations that emerge from the systematization.



### 3. Facing the Vision

Organising  
systematization





### 3.1. Systematization Requirements

In order to be useful, any methodology needs to be applied by starting from certain requirements and in suitable contexts and times. In addition, in order to implement a participative process such as systematization, there should be prior agreements so that it is not a frustrating experience.

We therefore have set out below set the key elements to take into account when choosing and using this methodology:

#### ◆ **Minimum agreement regarding the systematization**

The persons involved in the target systematization have to agree to systematise the experience. It is particularly important that there is an institutional commitment by the participating entities.

#### ◆ **Definition of what is to be systematised and who is going to capitalise the results**

One of the moments of the methodology is to define specifically that is going to be systematised. However, there should be a clear and an agreed general idea of what is going to be systematised (not everything can be systematised and, therefore, false expectations can be avoided). It is also important to bear in mind who is going to capitalise the results of the systematization, as many people are involved in the process.

#### ◆ **Economic resources**

Once the timeline has been established for the activities to perform the systematization, the costs have to be budgeted for the processes and ensure that the necessary resources are available.

#### ◆ **Training process**

As it has learning characteristics, the systematization must be assumed as a training process.

#### ◆ **Time required**

In order to be able to carry out a correct systematization process, a minimum time needs to be scheduled to implement the necessary systematization exercises.

#### ◆ **Materials conditions**

This refers to the appropriate conditions in order to be able to implement a systematization activity (spaces, materials and instruments required, etc.).

### 3.2. Systematization Annotation

The situation in its whole complexity cannot be tackled in an analysis. Thus, when planning a systematization, it is necessary to specifically define what part or what aspect of the experience we want to analyse.

Subsequently, and depending on that choice, it will have to be established which players will be available for the process, together with the times and resources available to carry out the systematization.

We therefore have to take into account the limitation, in our projects and proposals, of the resources and time available to be able to take on ambitious systematization processes. Therefore, it is fundamental to previously establish these elements in order to mark out the scope that the systematization is going to have, from a realistic position regarding our capacities and possibilities, so as not be personally frustrated or frustrate the expectations of other persons.

### 3.3. Participation Definition

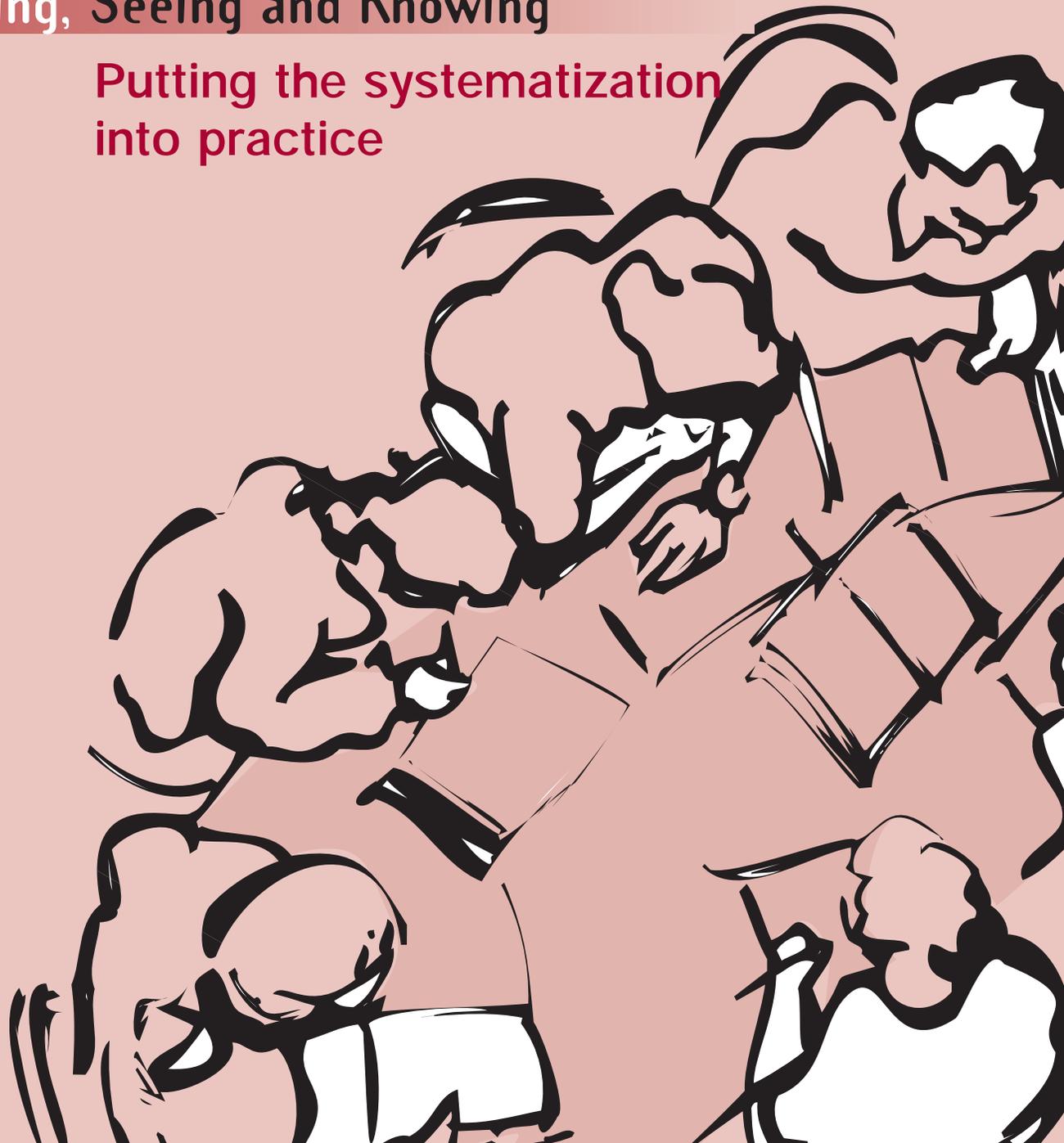
The people involved in the systematization need to know what is going to be asked of them and how they can participate. This all depends on the object that is going to be systematised, together with the priority of ensuring the participation of all the people involved. In any event, as it is not normally possible for all of them to be able to participate, times, functions, involvement and different responsibilities should be set.

It is likewise necessary to initially establish if the presence of an external team is necessary to oversee the systematization process and what its functions would be.

Finally, progress reports need to be sent, together with the final results, to all the people that have participated in the systematization.

## 4. Looking, Seeing and Knowing

Putting the systematization  
into practice





## Introduction: "The systemization snail"

As has already been stated that there are different methodological proposals according to the various systematization approaches, and we have set out the different steps that are developed in the process.

The FULCO Association (Mexico) has highlighted these ten steps in the systematization process:

1. Importance, utility and relevance of the systematization.
2. Recalling and reconstructing the experience (first approach).
3. The object to be systematised.
4. Recording and reordering the experience according to the object to be systematised.
5. Component of the object to be systematised.
6. Recovering and recording the information.
7. Tools and techniques to organise, record and reconstruct the experience.
8. Written communication skills.
9. Analysis and interpretation
10. Pooling.

We have likewise indicated that we propose to implement systematization using a version of the Red Alforja methodology. The different systematization steps are set out below. In each step, it is described, along with:



The **fundamental elements**,



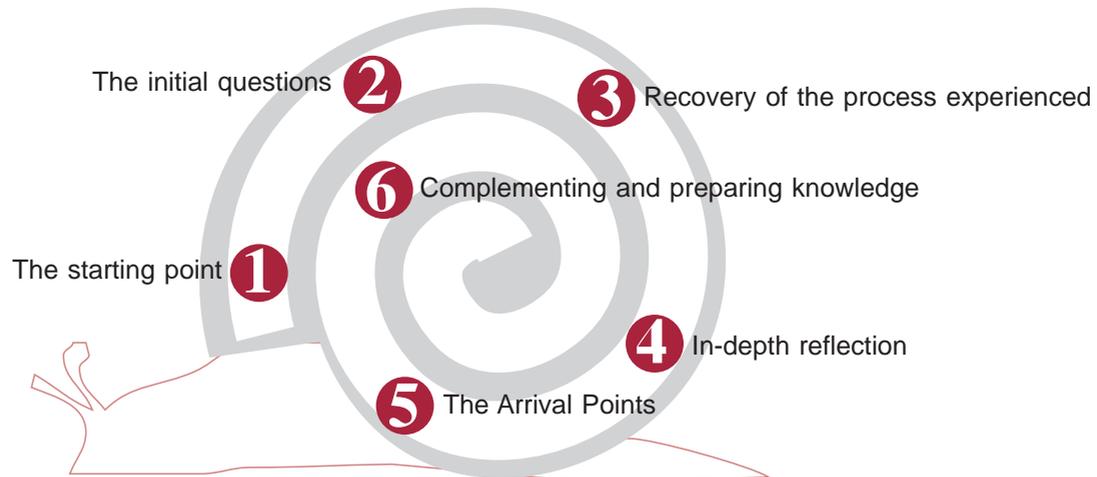
The **recommendations** and



The frequent **doubts** and **comments**

Before beginning...

Draw a snail with the following steps around the shell:



- 1**
  - Have taken part in the experience.
  - Have records of the experiences.
- 2**
  - Why do we want to systematise? (Goal).
  - What experience do we want to systematise? (Object).
  - What central aspects of the experience interest us? (Core).
- 3**
  - Reconstructing the background.
  - Ordering and classifying the information.
- 4**
  - Analysing, synthesising and critically interpreting process.
- 5**
  - Formulating conclusions.
  - Communicating what has been learnt.
- 6**
  - Systematising systematizations.
  - New learning processes.

## 4.1. The starting point

The practice is the starting point of any systematization experience. Practice comes first, followed by systematization. Therefore, it can be said that the people need to have experienced the experience to participate in any systematization. Other people may be required to participate, but the ones that must always do so are the people who have been involved or some of them that have directly experienced the experience.



- Having taken part in the experience.



- Keeping a record of the experience information that is useful for the systematization process.
- The records can be meeting minutes, diaries or field logs, draft documents, planning schedules, seminar reports, photographs, recordings, videos, graphs, maps, drawings...
- They can be used to prepare record tables depending on what is to be systematised and how. There is an infinite variety of possibilities that depend on the creativity of the persons and the group. In any event, the record should be as most useful and less complicated as possible.



- “Records nearly always exist, but it is difficult for them to contain everything that is needed”. We will have to optimise the existing records.
- The information from the records can be completed with what people remember, which creates a triangulation effect (reality, records and memory).
- The verbal sources have to be processed with all their potential and limitations.

## 4.2. The initial questions

The previous step could be “moment zero”: when the experience really has to be take place. We now move on to the true first moment of the systematization. It involves defining the what, why and wherefore of the systematization. It is rarely performed before the experience finalises, even though if it is thought about previously, the records collected would be clearer and the information better and more relevant. There are at least three initial questions.

### The wherefores of systematization

The reason why we want to systematise helps us to define the objective of the systematization. We have to be clear, concise and realistic when defining the objective of the systematization. This objective depends on the group, the expectations, the moment, the time...

As we have already stated there is a wide range of possibilities to answer the question regarding why we want to systematise. The answer to this question is also going to mark out how to do it. It is not the same to establish the experience of a group that systematises, as to analyse the causes of the success/failure of the experience, etc. According to where we place the emphasis, the definition of the methodology, participants and other aspects of the process will be different.



- The reason why we want to do this exercise.
- Be clear about the usefulness of this systematization (compared to considering systematization as a burden or obligation).



- Take the mission and institutional strategy into account.
- Take the institutional and personal opportunities and interests into account.



- It is essential for institutional and personal possibilities and resources be assigned.
- Readiness to carry out a critical approach to an experience, particularly by the institution.

## What experience do we want to systematise?

The experience to be systematised is to be marked out in time and space. What is established may depend on the goal of the experience in itself, of the specific context, etc.

A start date and a completion date should be set for the specific experience that is going to be systematised. This is known as the object to be systematised.



- Choose which experience we are going to systematise.
- Set the time, subjects and space of the experience.



- The whole experience does not have to be tackled.

## What central aspects of that experience are we interested in systematising?

The core of the systematization needs to be specified: which is rather the focus or “the glasses” with which we are going to looking at that specific experience.

It means looking from a perspective at that experience so that we do not overstretch ourselves too much, by not trying to tackle the experience in its whole complexity.

The core may be formulated in very different ways and an experience may be even systematised while considering different cores depending on what is of interest.



- Knowing which aspects, dimensions, factors, components we are most interested in (helps to select the type of information, the sources we need).
- Specifying the central focus and avoid dispersion.



- Thinking of it as a thread that runs through the whole experience.



- It has to be coherent with the goal.
- The formulas should always be explained, so we know what we are talking about.

**Some of the questions to be raised during this phase of the systematization may be:**

- Do I know the institution and project in depth: its mission, vision, target population, objectives, methodology, results, hindrances, facilitators and stages?
- Do I have access to the information: initial documents, reports, plans, assessments, etc.?
- Can I achieve the information through indirect and direct sources?
- Why this portion of the experience and not the other? How useful is it? Who does it serve?
- What benefits does it contribute to the practice?
- What information do we need?
- What would be the final product?
- What are the components of our object to be systematised?
- What are the components of the context our object to be systematised?
- What is the time cut off of our experience?
- What information is needed to reconstruct the object to be systematised?

### 4.3. Recovering the Experienced Process

This is one of the fundamental systematization steps: reconstructing the background, ordering and classifying the information. As has been previously mentioned, there are schools, approaches or current that give a fundamental importance to this moment. In any event, all the approaches consider this recovery as a key moment for the systematization.



- Reconstructing in an ordered way what happened, as it happened.
- Identifying the stages of the process.
- Classifying the available information (the basic components are defined that we will later analyse).



- Based on all the possible registries.
- Organising the information clearly and visibly.



- You are going to come across gaps or be snowed under and you wonder "why are we changing?" You can raise questions or things emerge unexpectedly... It is sometimes is a "moment of catharsis", and trust therefore needs to be created.
- Simultaneous systematization steps can be taken from then onwards (depending on the criteria that is used).
- Historical reconstruction is essential for the systematization.

#### 4.4. In-depth reflection Why did what happen, happen?

We have now reached the moment of the critical interpretation. The aim is to analyse, synthesise and critically interpret the experience process, comparing all the information collected in the previous step.



- Ask about the causes of what happened: why did it happen in this way?
- Analyse each component separately and carry out synthesis and interrelations.
- Observe specific features and the overall, what is personal and what is collective.



- Seek to understand the key factors.
- Seek to understand the logics of the experience.
- Compare with other experiences and theories.



- We go through the stages to discover what happened, what really was useful and not the difference about what was considered in the project (reconstruction logics compared to the planning logics).
- It is important to have a relationship with the institutional management.
- The theoretical understanding is consolidated and we can reconceptualise part of what had been previously defined. It is the moment of the dialogue with the theoretical interpretation (what do we say to the theory and what it tell us?)
- Guilt is what is most “annoying” and when there are penalties behind it. The role of someone who is not in the team often helps to objectify certain things (they can ask you questions that you have not done, it will help you to look in a mirror...). They can help us to deal with what is being expressed, the silences... to remain objective.

## 4.5. The Arrival Points

Based on the previous interpretation, we put forward our conclusions about what we have obtained from that experience and we consider how we are going to share what we have learnt with other persons and/or institutions.

### a) Reaching conclusions



- They are the main statements that emerge from the process.
- They can be practical or theoretical statements.



- They are starting points for new learning processes.
- They may be doubts or new concerns.

### b) Prepare various communication products



- Make the teaching of the experiences communicable.
- Prepare communication products (in various formats).



- Share the results with all the people involved in the experience
- Resort to creative and diverse forms.



- The different ethical and practical considerations have to now be taken into account.
- It must be useful and communicable.
- Not every one can always be consulted to give validity to the whole. proposal. Balance has to be found (disseminate a draft, for people to discuss it...). It is better to propose various outcomes, different “products”, which are included in the debates (even if there is no second product, but in the first, the debate that has generated is included).
- The communication is marked out by the goal if it is precise, otherwise it will be known to know who to communicate. The important thing is to communicate to continue debating.

## 4.6. Complementing and preparing knowledge

The systematization ends when we manage to understand the internal logics of the process and to obtain valid learning in relation to what happened which should translate into greater knowledge that will be used for further intervention in that field. Thus, the conclusions of a systematization process should be formulated in learning terms for forthcoming actions or interventions.

Likewise, it should conclude with some lessons that can represent “generalisation seeds” so that what we have learnt with our experience can be used for similar experiences, as well as when formulating specific policies or re-conceptualising the theory and concepts based on our own practices or, at least, to raise new concerns and new questions for their theoretical preparation.

Finally, it should be pointed out that there are systematizations, "small systematizations" and "major systematizations"... and according to their scope and diversity, they will contribute to the generating of new knowledge to a greater or lesser extent.

In any event, we have recently discovered the “systematization of systematization” process, which is, to systematise various different experience systematization, but which share the core of what is systematised or some thematic element. Given the diversity of experiences and the wealth can be contributed by systematising them, these proposals helps to make contributions to the social theory from the practice with greater fundament.



## 5. Already Seeing Results



Presenting  
the Systematization Results



The experience itself together with the learning and knowledge generated by it, may be submitted in various formats, also taking into consideration the goal of the communication and the target audience at which it is directed.

Some systematization communication proposals that have been performed are:

- ◆ Conference and seminars.
- ◆ Skills courses and workshops.
- ◆ Exchanges and visits to projects.
- ◆ Publications.
- ◆ Fostering informal or formal networks.
- ◆ Educational materials.
- ◆ Films, videos and slides.
- ◆ Leaflets.
- ◆ Posters.
- ◆ Community or street theatre.
- ◆ ...





## To Learn More

The majority of publications related to systematization have been published in Latin America and, in general, their dissemination in other countries is very limited. Therefore, we offer a list of different publications (books and monographs) that are publicly available in the Alboan and Hegoa Documentation Centres and the Pedro Arrupe Human Rights Institute at Deusto University.

### Theories, approaches and methodologies in systematization

AA.VV: *La sistematización en el trabajo de educación popular*, Revista Aportes nº 32, Dimensión Educativa, Bogotá, Colombia, 1989.

AA.VV: *Sistematización de experiencias. Búsquedas recientes*, Revista Aportes nº 44, Dimensión Educativa, Bogotá, Colombia, 1996.

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ARDÓN, M.: *Guía metodológica para la sistematización participativa de experiencias en agricultura sostenible*, PASOLAC, San Salvador, 2000.

AYLLÓN, M.R.: *Una propuesta operativa para sistematizar: aprendiendo desde la práctica*, Asociación Kallpa, Lima, 2002.

BARNECHEA, M.M., E. GONZÁLEZ y M.L. MORGAN: *¿Y cómo lo hace? Propuesta de método de sistematización*, Taller Permanente de Sistematización-CEAAL Perú, Lima, 1992.

BOLÍVAR, L.: *Sistematización de experiencias educativas en derechos humanos. Una Guía para la acción*, Instituto Interamericano de Derechos Humanos, San José de Costa Rica.

FRANCKE, M. y M.L. MORGAN: *La Sistematización: Apuesta por la generación de conocimientos a partir de las experiencias de promoción*, Materiales Didácticos nº 1, Escuela para el Desarrollo, Lima, 1995.

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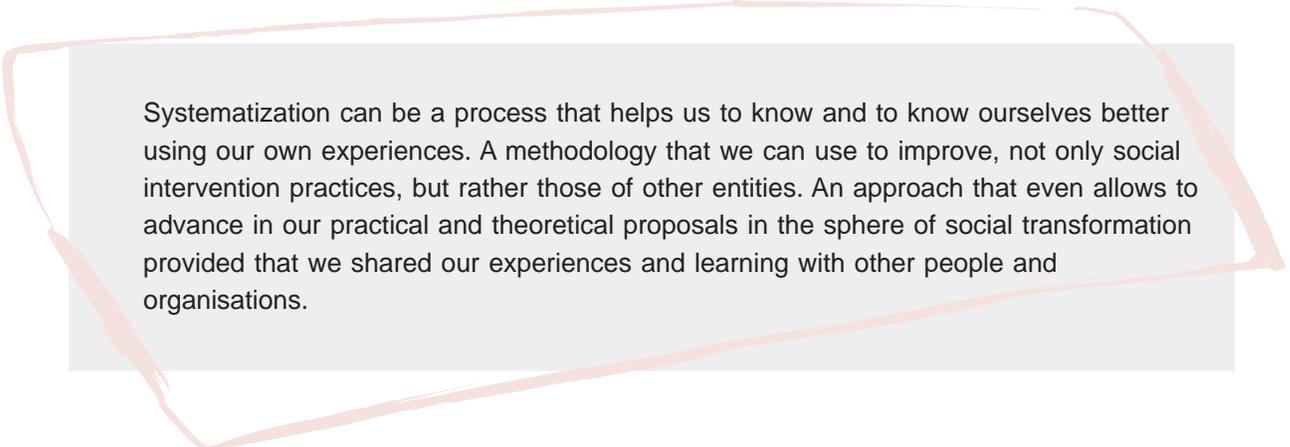
In addition to this guide, [www.alboan.org/sistematizacion](http://www.alboan.org/sistematizacion) website provides further information.





## A Bird's Eye View...

How can the fundamental aspect of this publication be summarised?



Systematization can be a process that helps us to know and to know ourselves better using our own experiences. A methodology that we can use to improve, not only social intervention practices, but rather those of other entities. An approach that even allows to advance in our practical and theoretical proposals in the sphere of social transformation provided that we shared our experiences and learning with other people and organisations.

For many publications that we prepare and we read, we will never know everything, nor even sufficiently as to be able to systematise correctly. **And systematization fundamentally needs a dialogue with our practice**, our identity and our contradictions. And therefore, all we need to have are the desire and predisposition to do so, as well as to pay attention to what our own practices indicate. Therefore, there is nobody better than ourselves, and finally...

**systematising is learnt from systematising!**

So if you have an experience that deserves to be systematised due to its success or its failures...

**Get down to work!**

