

The LEISA systematization process

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During part of 2004 and the first half of 2005, the editorial team of *LEISA Revista de Agroecología* ran a pilot systematization project, intending to try out a methodology especially designed to facilitate the process. They wanted to demonstrate that, contrary to popular belief, field experiences can easily be described and analysed, and that there is much to gain by doing so.



Sharing and exchanging the lessons learnt in one of the group discussions.

Photo: Jorge Chavez-Tafur

something which for many different reasons does not generally take place. The process helps those involved to see a project or an experience from another perspective. As such, it can highlight the positive aspects of an experience as well as those which could be improved. Systematization forces us to go through a self-criticism process, and to be open to suggestions and opinions which may come out as a result of the interaction with others.

While many different methodologies have been developed and presented during the last few years, the editorial team in Latin America was interested in developing these further, putting a greater emphasis on the analysis and thus clearly differentiating a systematization process from a mere description. They were also interested in using an easy-to-follow process, hoping this might motivate more people to get started.

The process

The method follows three phases, organising the information and opinions of those involved through a set of charts. This makes it easy to see if the information is complete or not. The first phase is to select and describe the experience or project to be looked at. Not everything that an organisation does can be the subject of a systematization process, and only one particular experience or project can be analysed at a time. Therefore the project needs to be described independently from the rest of the organisation's activities. This can easily be done using the chart shown in Table 1. The title, location, participants, objectives and strategies related to the particular project are clearly presented in columns.

The second phase is to describe the activities and achievements during the period of time chosen. All results should be described here, including unexpected results, difficulties faced, and results or targets that were not reached. By filling out the relevant chart (see Table 2), this should give a complete description of the selected project. From then on, to make the step from pure description into systematization, we move onto the most important phase: the analysis. Here, the opinions, criticisms and value judgements of all participants are gathered and presented in order to critically analyse the project. This is also the hardest part of the process. First it is necessary to define some criteria to assess the success of the project. Examples of such criteria are: community participation, sustainability or replicability of the project. For each criteria, it is then useful to identify some indicators, to measure the criteria in detail (see Table 3). The criteria and indicators should be agreed upon jointly. When filling in the chart, it is essential to include the different opinions of all involved. The analysis looks for the reasons

Systematization

A popular word in Latin America nowadays, systematization refers to a process which seeks to organise information resulting from a given field experience (be it a project or activity), in order to analyse it in detail and draw lessons from it. The main objective is to generate new knowledge from an activity, although the processes through which this is done, such as careful reflection and validation, are also objectives in themselves. Although the term is not as commonly known in English as in the original Spanish, the process itself fits perfectly with ILEIA's and its partners' institutional aim of exchanging knowledge and information for the development of low external input and sustainable agriculture, especially in the tropical and subtropical countries.

Systematization is a process which can help in documenting our everyday activities. It makes it possible to look in detail at what is being done and to reflect critically on what is being achieved,

Table 1. Setting the boundaries

Title	Area / Location	Target group	Starting date and duration	Objectives	Strategy/ approach	Components
Development of a system to support decision making	Patagonian mountain valleys, province of Neuquén	Small scale farmers	Mid 2003, for 3 years	Development and use of a currently non-existing instrument	Presentation of information through simulation models and GIS	1. Planning 2. Fieldwork, collection of information 3. Group analysis 4. Final presentation

Table 2. Describing our experience

Component	Activities	Results	Difficulties	Unexpected results
1. Planning	<ul style="list-style-type: none"> • Definition of what to compile • Task distribution 	<ul style="list-style-type: none"> • Consolidation of the group 	<ul style="list-style-type: none"> • Need to leave previous activities behind 	
2. Fieldwork	<ul style="list-style-type: none"> • Compilation of information • Feedback sessions 	<ul style="list-style-type: none"> • Identification of key issues; analysis of the information found • Opinions of farmers 	<ul style="list-style-type: none"> • Large distances between villages • Lack of time (in the team) 	<ul style="list-style-type: none"> • Advantages of an interdisciplinary approach become evident
3.

Table 3. Analysis

CRITERIA 1: Participation			
Indicators	Positive aspects	Negative aspects	Unknown aspects
participation of farmers		was planned, but could not take place, farmers not convinced	potential contribution
involvement of the local institutions	a lot of willingness	required constant pressure from the coordination of the project; all very busy	
participation of INTA teams	good, especially the first two years	difficulties to access information, roles not totally clear	the motives for a general lack of interest in the final year
...
CRITERIA 2: ...			
Indicators	Positive aspects	Negative aspects	Unknown aspects
...

behind the results and achievements and should not repeat the information in phase two. The outcome of this phase is the identification of some lessons learnt, and recommendations. A more in-depth look at the analysis allows for the identification of what can be presented as new knowledge as a result of an organisations' project in a specific location.

Finally, these charts are the basis for presenting the systematization of a project or experience in your chosen form, for example, writing an article, a document or even making a video.

Looking for participants (or guinea pigs?)

Having presented and successfully tried out the methodology with several institutions in Peru, the Latin American LEISA team was interested in trying it out with organisations or institutions in other countries. This meant replacing face-to-face

workshops with e-mail and the internet. Therefore, a special section was added to the LEISA website, and an e-mail bulletin was later developed to raise awareness about the pilot project, and invite comments from readers, in addition to the regular communication the editors have with their readers.

It was not difficult to find a few organisations interested in trying the methodology. Many institutions and organisations had answered the readers' survey sent by the magazine in 2003, which also asked if the readers knew of an experience which could be described and analysed. Many ideas were submitted, including ours (referring to "the development of a system to support decision-making"). This was how we were invited to take part in the systematization project, and, as one of the research stations of the *Instituto Nacional de Tecnología Agropecuaria* (INTA), the Argentinian agricultural research institute, we eagerly accepted. Interested in learning more from

our own experience, and at the same time in getting a better idea of how to go about it, we added the systematization project to our list of activities.

Together with eight other Latin American institutions, we started to organise the information we had on our project and activities according to the charts for each phase of the methodology (as described briefly above). We were then asked to send these together with any additional information we might find relevant, and all this was put online. Visitors were then able to see this regardless of where they were, and to give comments which immediately became visible. This generated an interesting exchange, allowing us and all the participants to clarify ideas and adjust what was said. We also got comments from the editorial team, which helped us to complete the description and the analysis, including information which was not originally considered. This helped us look at our own work from another angle, all of which made for a better systematization process, assisting us to reach our original objective: the generation of new knowledge.



One of the authors presenting the results of their work to all other participants.

The whole process was complemented with a workshop held in Lima in August 2005. Apart from meeting all the other participants, the workshop was useful as we were able to present what we had done and achieved with the systematization process, and at the same time analyse the advantages and difficulties of the methodology. We also discussed the advantages of using the internet and e-mail, and the need to have a manual or guidebook which could help us finalise the process and help institutions willing to start a similar process.

Results

As seen in the examples, the whole process enabled us to present our work in a detailed and complete way. By showing this to others we were also able to see it more clearly ourselves. We have therefore been able to learn from our own experience, not only in the sense that we generally learn from our daily activities, but rather by forcing us to take a critical standpoint and look at ourselves and at what we do. Together with this, we feel that following the process increased our capacities to analyse what we do, and we also realise that a systematization process can in fact be very useful. The correct application of a

systematization methodology ensures that the results of our work are more and more successful.

One of the most important aspects of the process has been the possibility of being seen all over the world through the internet and, through the printed version of the magazine, by the more than 10 000 persons who read *LEISA Revista de Agroecología* every trimester (where we expect our coming article to be published soon). The final stage of the methodology allows for the sharing of knowledge, information, and even of the methodology for systematization itself.

But as to the methodology itself, we frequently felt that the terminology used may lead to confusion in many cases, so it may therefore be necessary to clarify or explain it in greater detail. At the same time, the selection of criteria and indicators in the analysis may lead to biases, as the virtues and achievements of the project can easily be prioritised over the errors or difficulties found. The responsibility rests with those in charge of the project or of the experience being analysed.

The internet has proved to be a very good tool for this work, facilitating access to worldwide information and to the simultaneous interaction with many users. But its use is limited to those directly involved in the process. The challenge therefore remains as to how to make readers and website visitors more interested in systematization. This is linked to one of our observations during the process, where some of the experiences being systematized received more comments or suggestions than others, which made us wonder how much this external participation contributes to the final results. Getting more visitors interested has to be linked to a more detailed analysis of their actual contribution to such a process.

The group of organisations or institutions involved in this process consisted only of those interested and willing to go through it. Considering the Latin American universe, with an enormous number of institutions working in rural development and of projects worthy of being described, analysed and disseminated, it may seem that the participants were very few. We therefore think it would be useful to work on the dissemination of the methodology, and to make sure that all those interested in documenting their work have the opportunity to take part in such a process, and receive the necessary inputs and contributions of others.

Recommendations

It is common to associate a systematization process with a final evaluation stage, once a project or programme is finished. Having taken part in this experience, we feel it is advisable to include a similar process at three different moments during a project: when it is being formulated (the planning stage), during its implementation (on-going monitoring), and also at the end (the final review). Similarly, we recognise that time and other resources necessary to run this process effectively need to be taken into account as part of the project itself. They need to be assigned from the very beginning, or there is a risk that they will not be available later.

Our experience has also shown that this is a tool to be used by all those involved in a project, helping them establish stronger linkages among themselves, while at the same time helping them look at their project as a whole. Systematization should therefore not be an activity left to only some of the members of a team.

Photo: Jorge Chavez-Tafur

Our participation in the systematization process

Teresa Santiago and Máximo García

Arte Natura is a small NGO working in the southern Mexican state of Chiapas. We provide advice to local organisations, assisting them in their transition to ecological agricultural production. In 2004 we received an invitation from the Latin American LEISA Magazine to take part in a systematization process. We thought that our many experiences with ecological agriculture would be interesting to look at in detail, and accepted the invitation. We saw this as a good opportunity to get to know a systematization methodology and be part of its further development. This process proved particularly interesting, especially because of the relationships established between all those involved, and the effectiveness of the method.

Participation and interrelationships

Concerning the relationship between all parties, we all shared an interest with the LEISA team in examining our experience and practices in detail. This made it easy to establish a dialogue with them, even though at times we felt that communication between Arte Natura and the LEISA team could have been better. At the beginning of the process we were not clear about the level of communication that was expected. Besides, we were very busy, we did not see the advantages in making time for systematization, and we needed time for our other activities. Looking back, we see that these difficulties were part of the adjustment process at the beginning of a new institutional relationship. We have since made space and time for systematization in

our organisation. This adjustment was easily made because we are a small institution and the people who design the project are the same as those who work on it.

On the other hand, we felt that we were coming up with a lot of negative criticism, which did not help the process. Our intention to reflect critically on our work was at times too extreme, and some of the positive points were lost. We sometimes thought that our experience was not good enough to be shared, while now we know that was not the case. It is often easier to disregard a practice rather than to look for elements in it that may be useful to others.

The methodology

We used the methodology developed by the LEISA team, putting our information on the internet and getting feedback from them and others. We also took part in a workshop in Lima, where we met the other participants and collectively reviewed the method and the results each had after using it.

The methodology was fundamental in helping us understand our reality better, even if this was the first time we had used it. We experienced several setbacks, and the continual assistance of the facilitation team was vital to help us reach the end product. By sharing our experience with the other

participants, we received useful feedback, while also getting to know similar experiences. This helped to answer the doubts we had about the method, and at the same time share related information. It gave us confidence to come up with an article from the puzzle of our experience which can now be published in the magazine.

While writing the first draft, we noticed a difference with other methods that often have open questions listed in chronological order. In this case the charts used are more complex, something that helped us look for an explanation behind each fact. Still, it would be very helpful to have an exercise on writing something concrete, before deciding which information to communicate.

One unavoidable companion we had all through the way was our biased professional viewpoint. We tried to be objective, but realise that we have been trained as conventional scientists. We believe that one of the main results of following the systematization process has been finding a way to understand our situation with a constructive critical view, and, from there, promote new strategies of working with nature.

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Finally, it is worth recognising that there are two main obstacles to a systematization process. Firstly, we found ourselves overwhelmed with information, and the need to establish filters, so that we only read what may be interesting, can eventually result in barriers which cannot be overcome. Secondly, we must recognise that time always seems to be a limiting factor, especially for new initiatives, which are not immediately adopted by those who could benefit from them. Future initiatives should also follow the example here, which tried to encourage projects going through the process at the same time to interact. Considering there are so many organisations who share

common realities and problems, it may be interesting to create a forum where they could meet, exchange experiences and opinions, and enrich the analysis of their work together. ■

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