

# Tips for trainers

## Reflective action-learning: building capacity in systematisation methodologies

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### Systematisation and the production of useful knowledge

Systematisation methodologies allow the participants of a shared experience (a project, for example) to:

- reflect collectively upon their experience; and
- understand and learn from the successes, difficulties and failures of their shared experience.

The process relies heavily on techniques to encourage dialogue among participants so that they share and compare their perspectives and construct knowledge that is useful for future action. It facilitates the democratic production, dissemination and use of knowledge by bringing together people from diverse backgrounds to reflect and learn together.

### The capacity-building process

We trained 20 NGO leaders from Latin America and the Caribbean (LAC) between 2001 and 2003 so that they could systematise their own project experiences (see 'From participatory systematisation to a regional network for policy change', this issue). The NGOs had undertaken demonstration projects in local food security and sovereignty designed to overcome hunger and malnutrition in

rural communities. The findings were intended to:

- influence public policies;
- promote local learning and refinement of community-level strategies; and
- disseminate and exchange experiences and lessons.

The capacity-building process was undertaken in two phases, organised in a 'cascade':

- A first group of ten facilitators was trained by two consultants with expertise in systematisation and social communications, using a reflective 'action-learning' approach. Learning and reflection took place during face-to-face workshops; the 'trainee' facilitators then put their learning into action in their own projects with online assistance from the consultants. They were also oriented in basic training skills so that they could support the learning process of the second cohort of facilitators.
- A second group of ten facilitators was trained to systematise its own projects by way of workshops and on-site assistance from the first generation of facilitators. First and second generation facilitators were matched according to geographical proximity as well as thematic and/or strategic affinity. All the facilitators received ongoing online support from the consultants.

The facilitators were trained to conduct four core systematisation activities:

- the selection and careful delineation of a theme or line of work (this may be some element of work which will help participants to overcome a current challenge in their joint work);
- the collection and organisation of information from a wide variety of participants through dialogue and participatory activities;
- the analysis of the information, designed to take into account contextual and external factors as well as project activities; and
- the opportune and targeted dissemination of findings according to the participants' objectives.<sup>1</sup>

### Lessons and reflections from our experience

#### Benefits of the 'cascade' capacity-building approach

The 'cascade' capacity-building approach was an effective way to replicate and multiply the action-learning process among a relatively large group of facilitators (from nine countries of the LAC region) with limited external 'expertise'. Recently trained facilitators (the 'first genera-

<sup>1</sup> For a more complete explanation of the steps involved see our article in this issue.

tion') shared their learning with new 'trainees' (the 'second generation'). This was done with minimal input and support from the external consultants. The freshness of the 'first generation' facilitators' learning and practical experience made them especially effective trainers. This approach can potentially be applied to extend the reach of capacity building in many different settings. A similar approach at the local level – the transfer of learning and the institutionalisation of action-learning approaches within NGOs and communities – ensured the replication of skills at the local level.

### Resistance to active learning methods

Some of the trainee facilitators wanted to receive precise, step-by-step instructions to apply in their project systematisations rather than experimenting, reflecting and discovering the most effective approaches in their context. This is largely due to traditional educational methods, which encourage passive learning, based on copying and memorisation. As a general rule, discovery leads to more effective and sustained learning. In the specific case of learning to apply systematisation methodologies, approaches need to be context-specific and developed in situ to be effective.

### The consultants' role

The role of the consultants was to help trainee facilitators to understand the

logic and principles that guide the systematisation process. They also helped them gain skills in the methods and techniques that can be used in its application. We resisted the use of set formulas. Instead, we encouraged the facilitators to explore how to apply a set of broad guidelines to the specific conditions of each project context through in situ experimentation and learning.

### Systematisation is not the same as evaluation

Systematisation is easily confused with qualitative evaluation. But the distinction cannot be over-emphasised. It was some time before the facilitators fully understood that their task was not to assess or 'judge' the value of their project experience. Instead, their task was to understand and explain the experience from diverse viewpoints, and to generate knowledge for multiple uses on that basis. We re-emphasised the distinction at the beginning of the second phase of capacity building so that the 'second generation' facilitators did not fear that their project experiences would be evaluated by the 'first generation' of facilitators.

### Systematising 'unsuccessful' projects

On this occasion we chose to train facilitators from 'successful' projects (the definition of 'successful', in this instance, was a project that gener-

ated positive results by innovative approaches). However, it is just as valuable to systematise 'unsuccessful' experiences from which equally useful lessons can be learnt.

### Networking as a complementary strategy

We have discovered that systematisation and networking function as complementary strategies to achieve common ends. In our case, the systematisation process produced local knowledge and valuable learning which could be disseminated and exchanged among local actors. Networking at the regional level (Latin America and the Caribbean) has facilitated the political projection of that knowledge beyond the local level. This can be used as a means to influence public policy at national and regional levels and to replicate or scale up successful approaches beyond the initial geographic scope of the project.

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