



Social learning for innovation in rural sector



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The Chorlaví Group

The Chorlaví Group (www.grupochorlavi.org) is a platform designed to support social learning processes focused on projects for the institutional and productive transformation of poor and traditionally marginalised rural territories in Latin America and the Caribbean. The Chorlaví Group is sponsored by the Interchurch Organisation for Development Cooperation (ICCO, Netherlands, www.icco.nl), and the International Development Research Center (IDRC, Canada, www.idrc.ca).

Rimisp – the Latin American Centre for Rural Development (www.rimisp.org) acts as the Group's Executive Secretariat.

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Introduction



The Chorlaví Group (CG), established in 1997, is an initiative aimed at supporting social learning processes focused on institutional and productive transformation in poor and traditionally marginalized rural areas of Latin America and the Caribbean (LAC).

The Group's general objective is to promote and facilitate decentralized social learning processes in LAC rural societies, thus enriching the quality and improving the effectiveness of transformation initiatives related to a thematic agenda defined within the scope of sustainable rural development.

Participation in the CG is free and open to all non-governmental organizations (NGOs), rural organizations (ROs), foundations, universities, training and research centers, and other organizations and/or individuals who share the mission and objectives of CG.

The Group uses a set of tools to shape the social learning projects upon which its activities are focused. These tools include the Mink'a de Chorlaví Fund (FMC), an annual contest to finance projects systematizing innovative experiences; and tools based on information and communica-

tions technology (ICT), such as the electronic bulleting Intercambios, the Group's website (www.grupochorlavi.org) and e-conferences discussing a wide range of topics.

CG is governed by a Council of eight experts and representatives of sponsoring organizations, which holds strategic and planning responsibility for the Group. Funding for CG is provided by the Interchurch Organization for Development Cooperation (ICCO, Holland, www.icco.nl), and by the International Development Research Centre (IDRC, Canada, www.idrc.ca). The Group is also sponsored by the Latin American Association of Development Promotion Organizations (ALOP, www.alop.ac.cr). Rimisp, the Latin American Centre for Rural Development (www.rimisp.org), houses the CG Executive Secretariat.

The objective of this article is to inform interested parties as to the most important aspects of the working methods developed by CG, along with a summary of the main achievements and products to-date. Throughout the text the two authors, Rimisp researchers who have been in charge of CG over the last three years, seek to communicate and share their working methods with other networks interested in social learning focused on rural organizations.

The method we are presenting here is the result of a constant process of change and innovation. It was made possible through the efforts of many people who, with their valuable contributions, have helped to guide the task. However, we would particularly like to thank the men and women that form the CG Council who have been an important source of ideas and reflection in adapting the Chorlaví Group's working strategy.

The document contains four chapters. The first outlines the context that makes CG relevant for the region and the conceptual framework that sustains its actions. The second chapter provides details of the CG working strategy; the third indicates the results and effects of the Group's work. And finally, the main conclusions and challenges are presented.



Justification and conceptual framework

The region's rural context

Latin American rural societies need creative changes in the areas of institutional development, production transformation and the sustainable management of the environment, in order to combat poverty and social inequality.

These changes are necessary due to social and economic stagnation, environmental deterioration and institutional weaknesses that continue to dominate the Latin American rural setting, as well as the effects of globalization on the region's rural societies. In this sense, such changes can help to establish a new development dynamic, one in which the rural world is transformed from being a problem for its respective countries, into an asset.

Fortunately, there are numerous initiatives underway that are helping to improve the situation. First of all, there are a number of experiences regarding new forms of social action aimed at improving income, welfare and equity in rural areas. Many have emerged from the joint efforts of small producers and rural communities, companies, NGOs, cooperation agencies and government bodies, both at local and national levels.

In spite of their importance as spaces for experimentation and innovation, the teachings and lessons of these experiences are frequently not communicated due to an absence of or weakness in processes and mechanisms that allow for rigorous systematization, lack of comparative analysis with other similar experiences, and a (need for) broader diffusion of learning.

Weaknesses at management level and in knowledge dissemination frequently lead to a repetition of errors, or processes that are initiated without taking into account other previous and similar experiences as points of reference.

Secondly, there are the efforts of many different people, groups and organizations that operate in areas of economic, political, governmental, cultural or trade union power. These actors also work towards profound changes within Latin American rural society, not at the level of specific experiences but rather regarding more general objectives. In these cases outcomes are frequently limited by the weakness or lack of mechanisms and opportunities for critical reflection, dialogue and communication. Innovative experiences taking place in rural societies are thus often not identified or recuperated.

Responding to this situation, the Chorlaví Group (CG) stepped forward as a link to catalyze discussion, critical reflection and exchange between rural societies, their experiences and the areas of power where innovations can become institutionalized.



Over ten years in operation, the Chorlaví Group has developed a dynamic process of innovation and “adaptive management.” It has evolved from an initial approach of experience exchange, to organizational learning, and finally to social learning. The latter is the result of a process of critical reflection where the actors themselves, based on practices of social transformation, are able to develop new visions or perspectives regarding their environment and their missions, thereby improving their strategies and developing the ability to act more efficiently.

This represents a qualitative leap given that it improves the ability to generate changes based on learning processes, a key element that distinguishes the CG platform, especially in relation to the generation of and adding value to, knowledge.

Conceptual framework that sustains the Chorlaví Group

Two schools of thought define the concept of social learning embraced by the Chorlaví Group. The first appeared during the 1960s, and in general terms sought to explain the constant changes in cognitive and behavioral structures of individuals on the basis of their interaction with the surrounding environment (Urquijo et al, 1998). Bandura (1962) refers to this as behavioral modeling or imitation.

The second school of thought, which is more pertinent for the work carried out by the Chorlaví Group, defines social learning as a process for generating knowledge and collective action, thereby forming a basis for the development of social adaptation and innovative change (Roling and Wagemaker, 1998; Wadell, 2005; Wals, 2007). Beyond just the individual, this type of learning is centered on social interactions that people use as a basis for acquiring and constructing knowledge (Bourdieu, 1991).

In this sense, three dimensions are associated with social learning processes:

Context: learning takes place within specific social contexts, which may determine, facilitate or block learning processes undertaken by individuals or groups (P. Bourdieu, 1991).

Community-practice: this is not related to an individual receiving external information in order to modify his or her subsequent conduct. Instead it refers to people who together carry out determined actions in order to achieve collectively defined goals. This process leads to "lessons learned," which is to say, knowledge acquired through practice and reflection by the actors involved (Guijt, et al. 2003). It has also been referred to as experiential learning (Kolb, 1984).

Collectivization: this aspect refers to socialization and knowledge dissemination processes generated between different actors involved in rural development, which in turn promote the initiation of learning processes in other individuals and with other communities (Vargas and Bustillos, 1993).

Social learning versus organizational learning

Organizational learning can best be defined as "a dynamic process of knowledge creation generated at the core of an organization thanks to the individuals who integrate it and the groups they belong to, and directed at the generation and development of different capacities that allow the organization to improve its performance and results" (Real, 2003). In this sense, "organizations that learn can be defined as those that facilitate a learning process for all of their members, who are in a state of continuous transformation in order to satisfy environmental demands," (Charnes, 2004).

The underlying premise of this type of learning is related to organizations working in complex environments where learning strategies implemented by the organization in search of competitive improvements, range from adaptation to the transformation of the action framework – adaptive and generative perspectives, respectively (Aramburu, 2000).

In terms of social learning, it is important to underline at least two fundamental differences related to the type of actor involved and the use of acquired knowledge via this learning process.

Those actors considered for organizational learning are organizations working in complex and competitive environments, structured around concepts of administration that involve some degree of (centralized or decentralized) bureaucracy. They have working procedures and a workforce (directors, managers, staff, etc.) that remain relatively stable over time and are guided by institutionally defined objectives.

The subjects of social learning, on the other hand, are diverse actors (small farmers, universities, NGOs, government agencies, etc.) linked to development initiatives within their pertinent community. In this process, actors seek to communicate with each other in order to achieve certain economic or social development goals.

We are not referring to organizational learning in particular, but rather to community learning more generally.

Acquired knowledge for organizational learning means greater adaptability to the environment and certain advantages related to competing organizations. Furthermore, acquired knowledge is restricted to the area of the organization itself. In the case of social learning, on the other hand, knowledge is the result of actions by individuals, is adapted by them, and in turn collectivized and articulated with other experiences of other communities, forming a feedback process that goes beyond the borders of the community and its constituent individuals and organizations.

Consequently, those concepts of "social learning" that appear in development discourse, share various elements or guiding "principles."

- The pursuit of a world that is more just and sustainable, leading to an interest in issues of empowerment, poverty, ecology and democratic participation;
- The attempt to actively involve all decision makers, or rather, to stimulate "participation" in the broad sense of all interested parties;
- Placing value on experience as the basis of learning at both individual and collective levels;
- Recognizing that knowledge is neither absolute nor objective, but rather by its very nature, emerging and co-constructed;
- Recognizing that social learning involves "complex behaviors" (which means, learning is produced in an unpredictable and non-linear manner via multiple efforts) and can be conceptually framed within "systems thinking."
- Placing value on a form of facilitation geared towards joint discovery, inclusion and the search to identify solutions.



Strategy of the Chorlaví Group

The CG has developed a particular way of organizing social learning processes focused on the articulation of knowledge acquired by social organizations. This forms the basis for fomenting a process of discussion and reflection shared with those who take policy decisions that may affect the development potentials within rural societies.

This method is characterized by (a) the region (Latin America); (b) involvement of multiple actors such as rural organizations, political sectors, technicians, and both public and private agents; (c) being based on the systematization of specific experiences of rural development; (d) the articulation of specific experiences with lessons that can be institutionalized; (e) the incorporation of a communication dimension, so that results can be shared with those who did not participate in the whole process; (f) the intensive use of new information and communication technologies (ICTs), which allow coverage and participation to be extended at a low cost.

After ten years working to support learning processes in rural organizations, the Chorlaví Group, due to a continuous process of adaptation and innovation, has developed a successful working methodology as outlined in Figure 1.

Based on what Kolb (1984) refers to as experiential learning, this type of learning is rooted in the tacit knowledge of people and organizations which, through dialogue and critical reflection, is transformed into explicit knowledge.

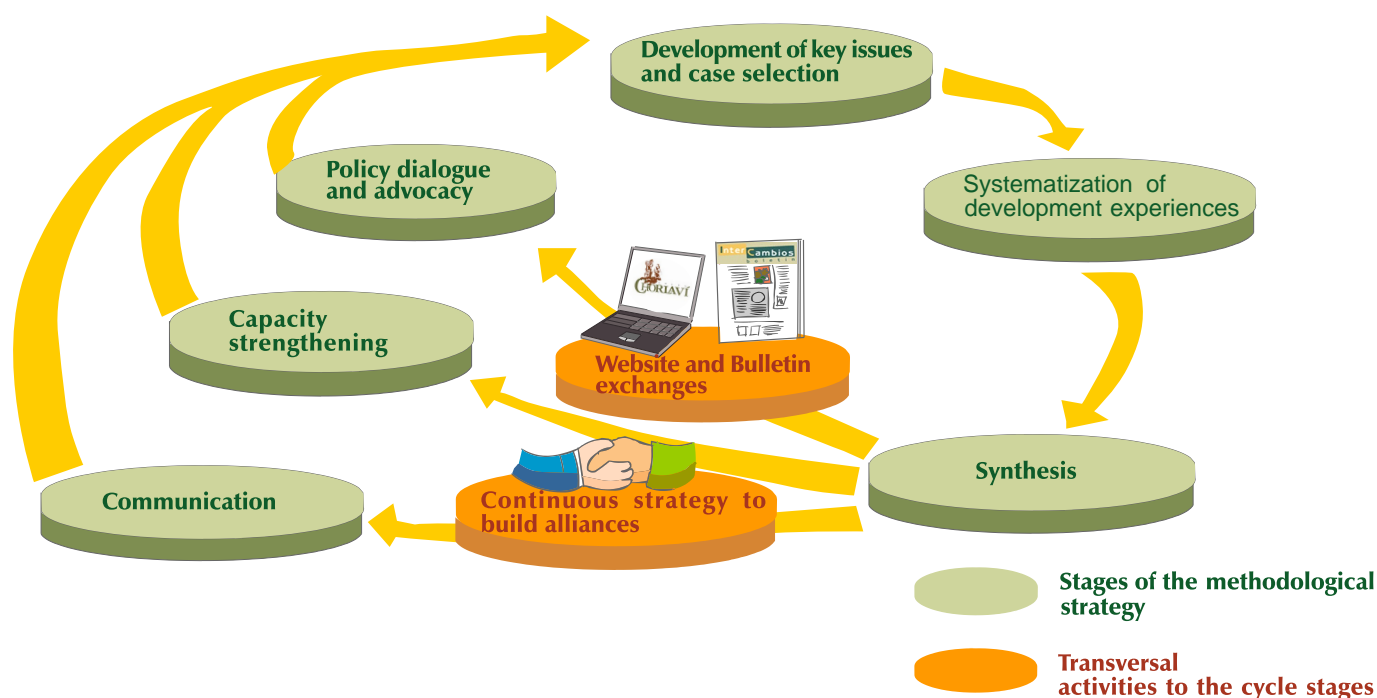
As such, answers are sought to the challenges faced by societies via the integration of formal knowledge with that emerging through practice.

Kolb's theory proposes a four-stage learning cycle: (a) development of a concrete experience; (b) reflections on what has happened; (c) conceptualization or analysis of why such results have been obtained; and (d) incorporation of the lessons learnt into development processes.

The Chorlaví Group integrates the stages proposed by Kolb, adjusting them to the particular needs of the Group's work, in order to facilitate processes of social learning based on experiential learning. First of all, the exercise of conceptualizing incorporates a collection of experiences from different regions and countries taking part in each learning cycle. This implies, on the one hand, the design of tools for communication and reflection that involve a significant number of people and organizations from different countries. On the other hand, it involves the development of opportunities for reflection that allow for an integration of specific lessons drawn from each experience as well as the distillation of more general lessons.

Secondly, the Chorlaví Group endeavors to ensure that the lessons gleaned from the experiences of rural organizations not only allow those who have had the experience to better meet their objectives, but also allow this new knowledge to be shared with people at different decision-making levels in the public and private sectors. In this way,

Figure 1. Chorlaví Group Methodological Strategy





they are able to contribute towards improving the situation of poverty and social marginalization affecting many rural areas in the region. This attempt to broaden the base by which support is provided to innovation processes is carried out in accordance with what was referred to in Figure 1 as policy dialogue and capacity building.

Summing up, the aim of the Chorlaví Group's work methodology is both to strengthen the innovation capacity of rural organizations via learning processes driven by the same actors; and to promote exchange between the protagonists of such experiences and other actors. As such changes in development policies implemented by the public sector, and increasingly by the private sector, are supported in order to extend the results of learning to other rural sectors in the region.

Defining the key issue and case selection

One of the most important elements in the Chorlaví Group strategy is the definition of key issues, that is to say, the themes from which we seek to learn about the experiences of rural organizations. Once this question has been answered, a strategy is implemented in the form of a competition, thereby allowing any rural organization to participate and possibly win.

Definition of an issue is undertaken via an annual consultation process involving a group of approximately 250 people. The members of this group are selected by CG taking into account their attributes as agents of change at different levels within rural development activities in the region. The drafting of this list of individuals has become a systematic process of CG.

Once a year, based on a framework theme defined for a three year period, members are consulted via email in order to guide the Chorlaví Group in the definition of a learning theme that is both innovative and relevant for the rural world in terms of projections for policy decisions. As such themes tend to be tabled due to contextual changes. They offer new challenges or opportunities, and tend also to be closely linked with the framework theme established by CG.

For example, for the period between 2005 and 2007, the framework theme was "processes of institutional and production transformation in poor, rural, traditionally marginalized areas that despite facing adverse circumstances, have been able to recreate themselves based on creative strategic visions."¹

Once a learning theme has been decided upon, the Chorlaví Group transforms this definition into a public announcement for the annual Mink'a de Chorlaví Fund (MCF)² competition, which is then disseminated via a communications strategy using the CG and MCF websites along with electronic mailing lists. Over a period of four months enquiries are received and published, along with responses, on the Group's website.

The competition procedure is sustained by two prevailing circumstances and one assumption. The first circumstance is that some experience has already been acquired and that the organization(s) concerned are keen to undertake a systematizing process in order to learn; in other words, there is an underlying demand. The second circumstance is the open recognition that there are many experiences that remain unknown and hence there is a need for the competition to be broad and transparent in order to reflect what is really taking place in the rural environment. Finally, the assumption is that rural organizations and/or their support organizations have access to the Internet.

After the closing date for the presentation of experiences to be systematized, independent referees carry out an assessment using criteria related to quality, innovation, and the level to which the proposals complement and focus on the issue of poverty. The whole process of proposal evaluation is carried out in strict adherence to the rules and procedures published on the CG website while the competition is underway.



¹ The framework theme was defined after broad consultation with different people in the region. A list of the most frequently mentioned themes was discussed by the CG Council, which finally decided on this theme.

² The annual Mink'a de Chorlaví Fund is a tool for the selection and funding of rural development experiences that focuses on the social learning processes directed by the Chorlaví Group.

Box 1. Examples of winning projects for the Mink'a de Chorlaví fund

- The Huasteca Potosina Coordinating Committee for Small Farmer and Indigenous Organizations (COCIHP) in Mexico, has a wealth of experience in collective action in the area of development. This led to the formation of a working group by the Autonomous University of Chapingo and a local company, Agrohuasteca S.C.. Through this working group, they work to systematize their experiences. The University had worked in the region for some time and had already been in contact with the Coordinating Committee. The aim of the project was to analyze, systematize and disseminate the productive and organizational work of COCIHP in order to garner lessons from the collective work and improve production levels, resource use, member's standard of living, and the search for sustainable development. (2001 Cycle: Collective actions and improvements in the living conditions of rural populations).
- The case of Tambogrande in Peru is relevant in terms of natural resource management and conflict with the mining industry. Consequently, the Municipality of Distrital teamed up with the NGO Economic Research Group to systematize the experience and establish requirements for the effective participation of local governments, communities and towns/villages in policy and decision-making processes related to mining sector access to local natural resources. This was seen as a necessary condition for adequate decentralized environmental governance that guarantees resource access for poor producers. (2003 Cycle: Decentralized Environmental Governance).
- Another important task of coordination led to a proposal for the systematization of sustainable development plans in three municipal sectors of Mata in the Minas Gerais region of Brazil. The proposal was headed by the Mata Alternative Technology Centre, in coordination with three rural workers unions, three small farmer associations and the Municipal Prefecture of Acaiaca. The main objective of the proposal was to influence the debate around public policy for sustainable rural development involving civil and public organizations. (2002 Cycle: Rural Territorial Development).
- Women doughnut manufacturers in Somoto, Nicaragua, in partnership with the Research and Development Institute (NITLAPAN – Central American University), proposed the systematization of their experiences. The aim was to contribute to the development and strengthening of their learning capacities, along with those of other actors, regarding territorial development initiatives based on the premise of the market as a strategy for dealing with and overcoming poverty and the segregation of rural families. (2004 Cycle: Access to dynamic markets).
- The communities of Pueblo Nuevo, Santa María Chiquimula and Santa Eulalia in Guatemala, formed the basis of the proposal coordinated by Landivar University in an attempt to promote social capital networks at local, regional and international levels between migrant communities and their places of origin, generating and strengthening self-help mechanisms and public policy advocacy. (2006 Cycle: International Migration and Rural Development).

Systematization of development experiences

The process of systematization is the phase of this work that directly implicates rural organizations involved in the different development experiences. This stage is carried out within the framework of different methodological strategies. However, a minimum criteria is applied to all cases, such as ensuring the participation of a diverse range of actors; incorporating any groups that have been excluded at the reflection stage; establishing opportunities for discussion that allow criticism and self-criticism; and finally, developing a strategy to validate and disseminate results within the communities that comprise the work process.

One critical aspect identified by CG is to ensure the participation of grassroots rural organizations, as their involvement is not always evident or guaranteed; therefore, control and follow-up tools have been designed for this purpose. For example, before signing a contract, a formal letter is required from a representative of the participating organization to establish that there is agreement vis à vis the proposal, its objectives and the working methods to be used.

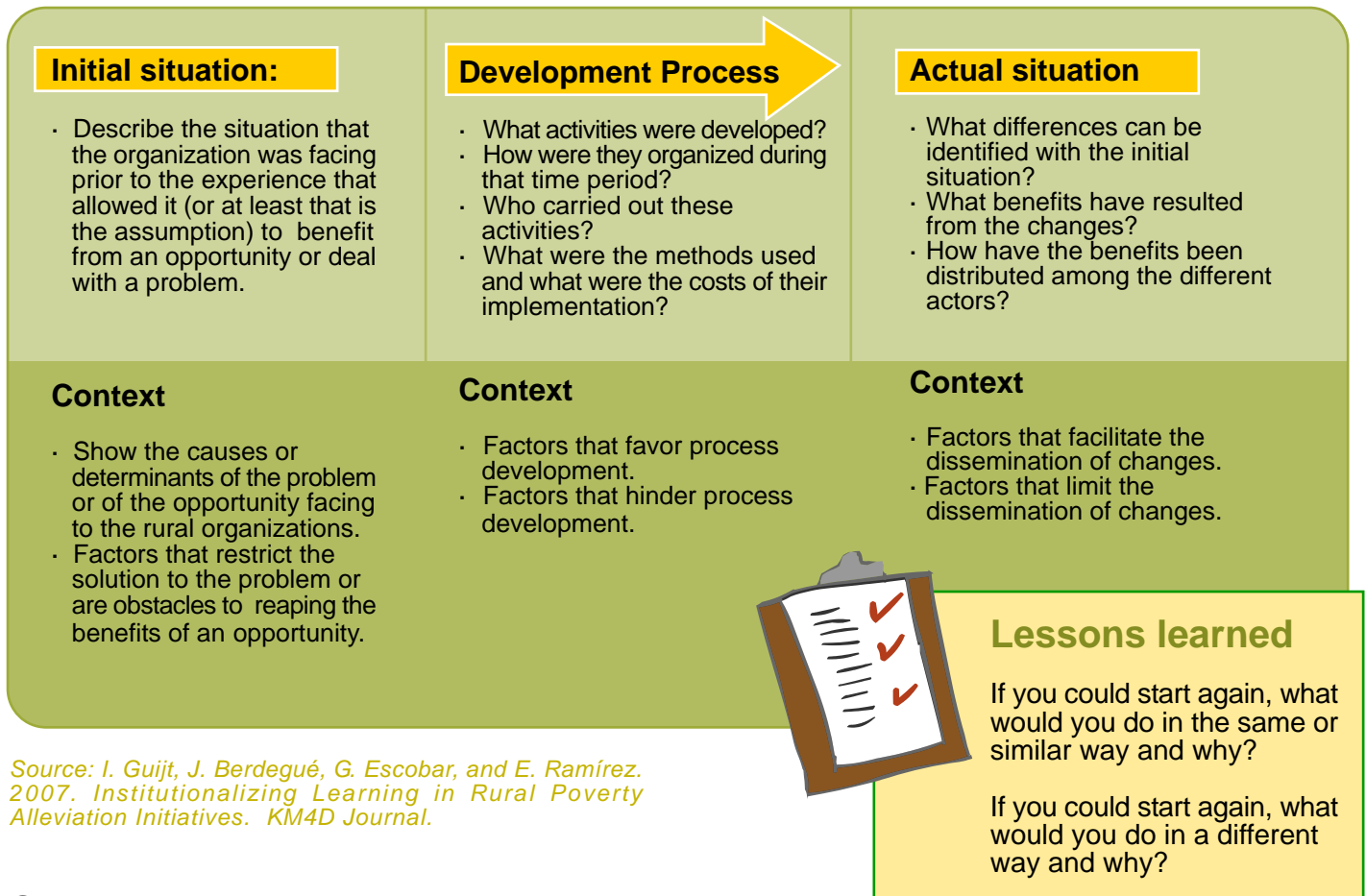
Another characteristic of the systematization methods used in the work carried out by the winning proposals is that precedence is placed on process analysis over impact evaluation. For the Chorlaví group, the priority is to know what rural communities and their organizations have directly experienced, along with how different actors remember and evaluate the whole process. The aim is to promote a process of critical reflection in order to address the main question for all learning procedures: if I were to repeat the experience, what would I do in the same way and what would I do differently?



This implies that these experiences are generally divided into three stages on the basis of a timeline. This entails recognizing an initial situation, the process and a final outcome.

The proposed stages and key questions for each stage are shown in Figure 2.

Figure 2. General model for experience systematization



Source: I. Guijt, J. Berdegué, G. Escobar, and E. Ramírez. 2007. *Institutionalizing Learning in Rural Poverty Alleviation Initiatives*. *KM4D Journal*.

Synthesis

In order to integrate the different experiences that have been systematized into the framework of the Chorlaví Group, general elements observed in synthesized experiences in each of the learning cycles have been selected. Although this process was developed at the end of the field work period (lasting on average one year), there are a number of intermediate activities that provide fundamental inputs for the synthesis process.

Consequently, it is possible to identify five phases, not necessarily occurring in this order: (a) the definition of recurrent questions before beginning systematization in the field. For example, what are the contexts that facilitate or impede organizations from accessing dynamic markets or what are the (formal or informal) regulations that help improve the development of rural organizations; (b) drafting of a state-of-the-art document using the main elements defined by related literature for the questions that need to be answered; (c) two electronic discussions with participation of the systematization teams and local and national agents interested in the issues involved



in the work – approximately 200 people; (d) an electronic conference³ involving a large number of interested participants – around four thousand passive and 300 active participants⁴ – discussing issues related to common questions regarding the systematization of experiences and the state-of-the-art document, and; (e) a face-to-face synthesis workshop wherein three or four people follow-up on the state-of-the-art document, experiences and electronic debates. Participants are selected from different groups developing systematizations with rural organizations, from those who have actively taken part in the electronic discussions, and from specialists responsible for drafting the state-of-the-art document.

The final product of this phase is a summary document dealing with the main lessons that appear throughout the systematizations, findings and pending issues. For example, in the cycle dedicated to the issue of poor and traditionally marginalized areas accessing dynamic markets, the following lessons were highlighted.

Box 2.

The main lessons from the learning cycle dealing with poor and traditionally marginalized rural territories in Latin America and the Caribbean, which have been successful in accessing dynamic markets, are the following:

- The first lesson is that under certain conditions producers and their organizations in poor and marginalized territories are still able to identify dynamic markets for their products.
- Poor and marginalized territories can identify dynamic markets at both local and non-local levels. Local markets can be used by producers and their organizations to gather important information (regarding prices, quality, and types of consumers) that can provide relevant inputs for (local) economies. In other words, 'dynamic' is not necessarily synonymous with non-local markets.
- The way producers are organized within a given territory is a fundamental condition for sustainability and access to dynamic markets. The 'ideal' organization does not exist. In some situations, informal structures are enough to establish trade relations. However, when markets are non-local, organizations should formalize their structure and establish very clear guidelines in order to adequately respond to market demands.
- Successful linkages involving poor and marginalized territories always need external support at the initial stages that lasts for a sufficient period of time. This type of support may come in different, but complementary forms. For example, via NGOs implementing international cooperation projects; through the direct



intervention of central governments or private-sector service providers; and/or directly from private firms.

- The innovation of institutions and production processes is vital for access to and a sustainable relationship with dynamic markets. Institutions that govern the relationships between producers and their organizations, and with the markets, have to adapt themselves to the conditions imposed by food distribution systems. Production processes, in turn, need to develop in order to deal with two specific factors: quality and cost structures.
- When poor and marginalized territories are able to appreciate aspects of their own identity either through their products or services provided (for example, craftwork or tourism), new markets can be created that can, under certain conditions, transform local economies.
- In such territories, the effects of access to dynamic markets are variable. Firstly, it depends on the size of the projects: smaller organizations tend to have less territorial impact. Secondly, the equity of the effects on the territory depend on the level of initial access to assets, mainly land, knowledge and capital. The same projects or organizations are often able to loosen funding and knowledge restrictions. However, the flexibility of barriers regarding natural resource access at national policy level, are less frequent.
- Generally, the territorial effects of access to dynamic markets are demonstrated in rising employment as well as increased income for those taking part in the commercial chain directly linked to the products being traded. Effects on other economic activities in the territory are less evident.

³ An electronic conference is an exchange of ideas over the Internet. In general, such processes have a two-week duration and are conducted by a moderator who writes a daily report incorporating the main ideas and proposing questions that will be developed prior to being presented in a work programme.

⁴ 'Active participant' refers to someone who submits an email to the electronic conference with their ideas and opinions: a 'passive participant' is someone who has registered for the conference but does not submit any emails.

Communication

The Chorlaví Group communications strategy is implemented through intensive use of the Internet, along with other activities where people are physically present; written material is also produced to support specific communication initiatives. Organizations that annually systematize their experiences implement their own complementary communication activities.

The Internet-based communications strategy is supported by a website that contains all the information and reports produced by CG in each of its learning cycles. Additionally, a monthly electronic bulletin is published and distributed to an extensive list of interested parties.

The communication strategy for events where people are physically present is more focused on people and organizations that are directly linked to the design of rural development policies and/or programs in the region. These may include the presentation of results to the Ministries of Agriculture or rural planning working groups from the different countries involved as well as national or international meetings of specialists in related issues.

Capacity Building

The CG strategy for capacity building focuses on three levels of operation. The first relates to rural organizations and people and/or institutions that support the systematization process. Most efforts are targeted at this level. On the one hand, rural organizations can use the lessons obtained in the systematization process to improve their work, for example, control mechanisms for organizations, or improvements to communication systems with members. On the other, at this level, it is possible to access working methods to improve the ability of organizations to learn from the practice of increasing their levels of innovation.

The second level is capacity building that is centrally driven by the Chorlaví Group, which happens through two types of activities: the implementation of on-line courses based on the materials produced during the learning cycles⁵; and the development of conferences or focused training activities using synthesized systematization materials. Such was the case in the main presentations made at the meeting of rural municipal authorities in Peru, or at the FLACSO (Latin American Faculty of Social Sciences) seminar organized in Ecuador to celebrate its 50th anniversary.

A third level of capacity building is carried out through the organization and development of learning tours. These are on-site visits to sub-groups taking part in the learning cycle. A lot of care is taken in the selection of experiences for these tours. The underlying idea is that through direct observation and dialogue with the instigators of the experiences being documented and analyzed, it will be possible to identify the main shared elements and general lessons

as defined by synthesizing the learning process. The participants on these tours are private and public sector development agents who were not involved in the systematization teams. Consequently, learning elements supported by the Chorlaví Group have a greater chance of broadening their effects; that is to say that more people are introduced to the learning.

Policy and Advocacy Dialogue

The Chorlaví Group has a vested interest in the lessons learnt through the different cycles being considered and applied by a broader number and range of people and organizations. The belief is that rural development policies and programs in the region, supported by either the public or private sector, or through international cooperation, can incorporate the lessons learnt by rural organizations into their design, thereby becoming more efficient.

Over its ten years of work, the Group has placed a greater emphasis on this part of its methodological strategy, which at the beginning focused primarily on communication. However, given the limitations of such a focus, the Group has experimented with other activities that tend to be more effective. For example, grassroots organizations – the protagonists of the systematizations carried out in each cycle – have been given support to implement face-to-face workshops involving local and national actors. These provide an opportunity to showcase experiences that have been systematized, along with the results obtained from other experiences around the region, and synthesis reports.

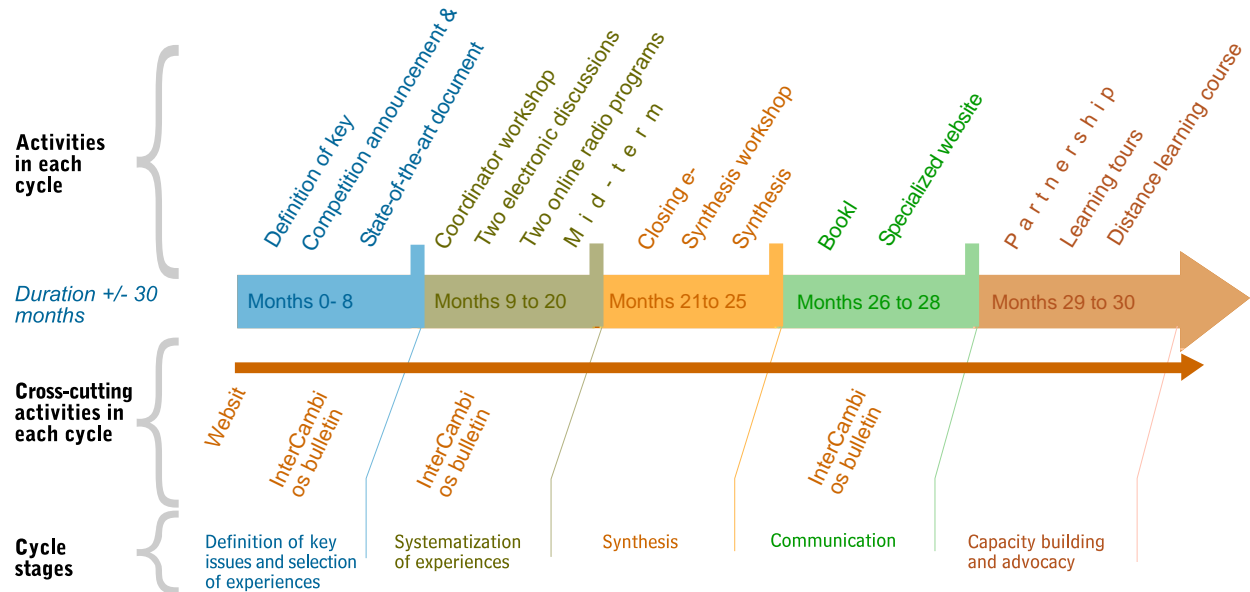


⁵ For example, the collaboration agreement with the Internet education platform implemented by FODEPAL and the FAO.

Such events have a dual purpose: first, to integrate the demands of rural organizations with specific offers made by public and/or private sector policies; and secondly, to demonstrate to technicians how they might improve these instruments. These alliance workshops are organized and implemented by rural organizations themselves.

Summing up, the strategy and activities of the Chorlaví Group can be illustrated in a chronological reference timeline⁶ synchronized to the number of months that a cycle lasts, which is generally about 30 months. (Figure 3)

Figure 3. Reference timeline of a learning cycle



Results and Effects

For the most part this report is reflecting on the work carried out by the Chorlaví Group between 2004 and 2006. However, it also integrates cycles undertaken earlier stages, and the cycle that has since been initiated with the new programme. This allows for a greater understanding of the real achievements of the Group's working methodology.

The issues dealt with over six years of work undertaken by the Chorlaví Group, established following consultations with people involved in regional rural development, were as follows:

- Collective action and improvements in the living conditions of rural populations (2001)
- Rural Territorial Development (2002)
- Decentralized environmental governance (2003)
- Poor and traditionally marginalized rural areas of Latin America and the Caribbean that have successfully accessed dynamic markets (2004)
- The role of local governments and decentralization in strengthening strategies that allow poor and marginalized rural areas to be revalued: partnership experiences between local and municipal governments. (2005)
- International migration and the development of poor rural areas in Latin America and the Caribbean (2006)

- Participation of traditionally excluded groups in new, non-farming, rural markets (2007)

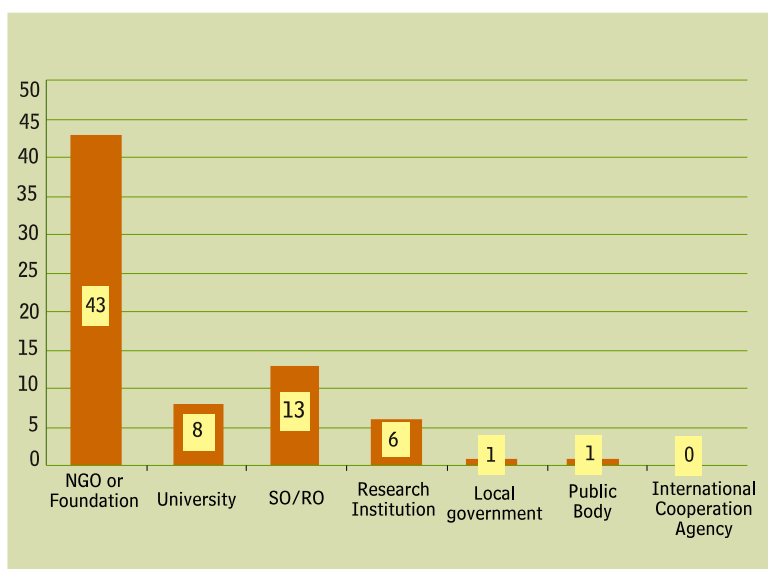
On average, approximately 119 organizations take part in each contest by submitting systematization proposals. Of the 833 organizations that have participated so far, 72 were selected as awardees⁷. As can be observed in Graph 1, in 18% of cases (13 winning proposals), the rural organizations also acted as coordinators of the systematization proposals; or rather, the technical teams that draft and implement the systematization, are members of the rural organization involved in the experience.

Regarding the remaining 82% of rural organizations, these are linked to other groups that provide technical know-how to develop and implement the systematization process. NGOs are the type of organization that most frequently accompanies rural organizations in the process of systematization, followed by universities and research institutions or centers.

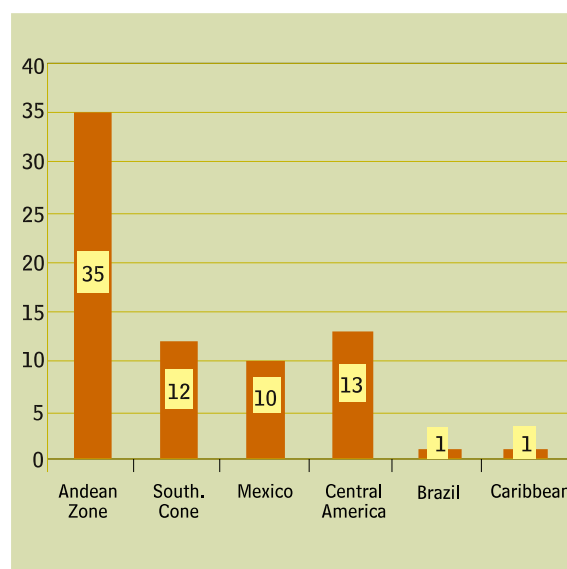
⁶ In practice, the development of a cycle entails activities that are carried out simultaneously but separately at the communications, capacity building and advocacy stages, or are merged together in the same event. As such, the timeline should be treated as a reference.

⁷ Only four organizations have won the contest twice. None has won it more than twice.

Graph 1. Number of winning proposal per type of institution.



Graph 2. Total number of winning proposals per region.



Graph 2 shows the number of winning proposals distributed across the following regions: Andean Zone; Southern Cone; Central America; Mexico; Brazil; the Caribbean. The data shows that the Andean Zone contains the largest proportion of winning proposals (48.6%), followed by Central America (18%). Brazil stands out for its limited participation in the contest. One possible cause of this is that while the contest application documents are distributed in Portuguese, Spanish and English, all other information contained on the website, the InterCambios Bulletin, and so on, are published mainly in Spanish.

Table 1 shows the number of individuals and organizations that have taken part in the main learning activities organized by the Chorlaví Group. No data is presented regarding participation and alliance workshops due to the problems involved in obtaining comparative information disaggregated per region.

Additionally, given that the Group embraces an approach of constant innovative management, there are activities now underway that were not implemented during the first year, such as distance learning courses or local and national working groups.

Table 1. Summary of individual and organizational participation in different learning activities per zone of origin (number) (1)

Activity	South. Cone	Andean Zone	Brazil	Central America	Mexico	Other Regions	Total
E-conferences	279	579	106	149	110	1.315	2.538
Distance courses	30	77	2	23	16	4	152
Local and national groups discussing and exchanging lessons (2)	35	203	-	97	56	-	391
Total number of individuals	344	859	108	269	182	1.319	3.081
Projects applying to the MCF competition	200	369	52	138	76	-	835
Projects winning the MCF competition	12	35	1	14	10	-	72
Rural organizations directly involved in the winning projects (3)	17	54	6	18	14	1	110
Total Organizations	229	458	59	170	100	1	1017

(1) Data on the most recently initiated cycle relates only to contest applicants, awardees and the organizations involved.

(2) There is no data on the cycle that began in January 2008.

(3) In a given proposal there is more than one organization involved, as such, this category should be added to that of winning organizations.

The Table highlights a key characteristic of the Chorlaví Group: its regional span. As can be seen in the Table, a significant portion of those directly or indirectly involved are located in Central America reflecting the focused efforts to incorporate grassroots organizations in this sub-region. The percentage of organizations in Central America has risen from 9% in the first social learning project in 2001, to 23% in the project now underway. In short, the Chorlaví Group is a regional network whose reach, activities and participants are distributed throughout every sub-region of Latin America.

Regarding costs and funding sources, the Chorlaví Group has designed a strategy to support its objective to broaden the financial support base. Effectively, a social learning project also mobilizes the resources of participating organizations and other donors. Approximately 42% of each learning project is funded by ICCO and 18% by IDRC. Organizations who submit winning proposals provide 20% of funding, and another 20% comes from other donors.

The visible effects of learning projects are difficult to measure and quantify. The work of the Chorlaví Group is sustained by two basic principles: (a) the existence of experiences that can provide lessons via participatory systematization proposals, and (b) the discussion and exchange of ideas and lessons using information technology tools. If both actions are executed appropriately, efficiently and effectively, they can generate lessons that contribute towards societal transformation and innovation.

Through its follow-up and evaluation system, the Chorlaví Group has identified changes that occur over the course of different working cycles. These effects can be classified into five main groups:

1. Concrete changes in the way rural organizations and/or NGOs and the local governments supporting them, carry out their tasks. For example, in the learning cycle related to decentralized environmental governance, a clear increase could be seen in capacity of organizations that have systematized their experiences, to negotiate with mining companies working in their area. (Participation of Municipalities and local populations in policies regarding mining sector access to local natural resources: the case of Tambogrande, Peru).
2. Changes in the form of implementing and organizing development projects for local communities – turning experiential learning into an action strategy. An example is the case of Ayuda en Acción (AeA), with their project “the systematization of experiences related to rural territorial development in three development areas” (Locoma in Bolivia, Santa Elena in Ecuador and Bambamarca in Peru).
3. Application of the definition of criteria used in public rural development programs. Thus, the cycle on Poor and Traditionally Marginalized Rural Areas in Latin America and the Caribbean that have successfully accessed dynamic markets, allowed “a strengthening

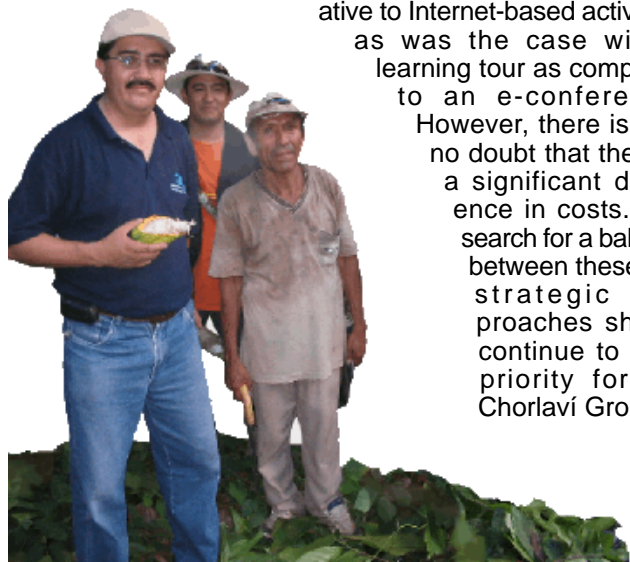
of the knowledge that is applied by the Ministry of Production programs and in areas of theoretical research linked to self-managed, integrated and sustainable rural development in the southern part of Santa Fe province, Argentina.”

4. Useful elements for defining legal and regulatory bodies such as the case regarding the incorporation of key systematization concepts in discussions vis à vis the Forestry Law in Honduras, using contents from the Environmental Governance learning cycle.
5. The possibility of establishing agreements between organizations that systematize their experiences, and organizations that support rural development. For example, in Somoto, Nicaragua organizations such as the Municipal Mayor’s Office, the Netherlands Development Organization (SNV) and Swiss Contact were involved in the discussion and search to identify solutions for problems faced when producing and trading products (e.g. rural families selling doughnuts on the street, Nicaragua).

However, there are a number of critical aspects, problems and deficiencies that urgently need to be addressed by both the Chorlaví Group as well as projects seeking to develop learning platforms based on ICT tools.

Firstly, the issue of users or target populations: the Chorlaví Group has no justification if its results trigger improvements only in the organizations that directly carry out the systematization projects. The area that the Group can reasonably be expected to reach with information for improving decision-making processes must be extended. In this sense, the Chorlaví Group faces a challenge to consolidate spaces providing greater participation for all of the people with whom it wants to foment certain changes. Consequently, not only the identification strategy for the target or reference group chosen should be the priority issue, but also the design of new work methods to increase participation in the discussion and synthesis of each learning cycle.

Secondly, the Chorlaví Group faces a growing conflict between being an interactive network based on the use of Internet tools, or on the contrary, a network employing more face-to-face activities. There is no doubt that the development of face-to-face activities has a greater impact on participants relative to Internet-based activities, as was the case with a learning tour as compared to an e-conference. However, there is also no doubt that there is a significant difference in costs. The search for a balance between these two strategic approaches should continue to be a priority for the Chorlaví Group.



Finally, the Chorlaví Group should focus on improving its capacity building strategies, so that the same rural organizations that participate in learning cycles are able to transform themselves into agents of change at their own locations, thus increasing the effectiveness of the processes supported by CG.

7. In order to foster social learning strategies such as those detailed in this report, there is not only a need for social organizations that drive innovative processes in the struggle against poverty, but also for an ethic and environment that permits critical reflection.

8. Finally, it is imperative to bear in mind the possibility that rural organizations and their representatives need to be able to effectively access to the Internet.

Conclusions

1. Through its flexible management approach, the Chorlaví Group has developed a working methodology that allows the innovations being developed by rural organizations as a strategy to face the challenges and opportunities imposed by a constantly changing context, to be made visible. This visibility strategy means that the design of programs and/or policies aimed at rural development in our region are fed and complemented by lessons gathered from the experiences of rural societies themselves.
2. The Chorlaví Group is a learning experience that was made possible due to the flexibility of donor agencies (ICCO and IDRC), which while maintaining a detailed follow-up of CG's work, supported innovation. However, reliance on a Council that offers constructive criticism and, above all, offers proposals to improve the work, has also been very important. Finally, it is essential that we highlight the value of the existence of a proactive Executive Secretariat that makes full use of all opportunities that are created.
3. The exchange of ideas and critical reflection regarding specific issues via the use of ICT tools, apart from being very economical, allows value to be increased as regards particular systematization experiences, which contributes to the integration and synthesis of more comprehensive lessons.
4. The results of the application of CG working methods with rural organizations to increase learning founded on experiential knowledge, contributes towards modifying political and institutional contexts in favor of the most marginalized segments of our rural societies. Other supporting elements to this process are dialogue, critical reflection and synthesis strategies with those actors who are closely linked to the processes of policy and economical decisions.
5. Learning strategies such as those implemented by CG incur important costs. For example, it is important to support the systematization processes of rural organizations, due to the fact that in general, there are no other funding sources for these kinds of activities. Additionally, the implementation of ICT-based virtual activities should go hand-in-hand with face-to-face events.
6. The existence of a proactive Council that understands the reality of social organizations in rural regions has played a fundamental role in the development of the Chorlaví Group.

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