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# Generating Knowledge in Popular Education: From Participatory Research to the Systematization of Experiences

Alfonso Torres Carrillo

The article presents a revision of how popular education has integrated into its practices and reflections on participatory research. After a presentation of popular education as an educational movement and pedagogical current, the article develops a historical reconstruction of the relationship between these two, while offering a critique of the legacy and challenges of this kind of double education: research with an emancipatory perspective. The article ends focusing on the systematization of experience as an emergent research mode in the field of popular education. Although there are different approaches to systematization, all of them try to recover and interpret the meanings that manifest themselves in social practices, with the purpose of strengthening them.

**Key words:** popular education, participatory research, thematic research, action research, systemization of experiences

## 1. Popular education, necessary conceptualization

Popular education is an educational movement and pedagogical current that emerged in Latin America in the seventies. It was a result of Paulo Freire's pedagogical proposals happening within the context of the radicalization of the popular struggle and the cultural and intellectual movements.<sup>1</sup> During the past four decades, hundreds of groups, practices and projects have identified

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<sup>1</sup> The following lines are taken from my book *Educación Popular, Trajectory and Current Issues* (El Búho, Bogotá, 2008)

themselves as part of the “popular education” movement; however, this does not mean that there is one unique way to understand it. For Joao Bosco Pinto “there does not exist one universal meaning for popular education; its meaning shall be generated by its political implications and determinations” (Pinto 1894).

Although historically these two words have often appeared together, they do not always refer to popular education as it is understood today. Its definition is based on experiences brought forth by the continuous application of different educational activities intended for the defence and autonomy of the popular world, not by a set of rigid theoretical ideas or doctrines. Nonetheless, in exploring what has been documented about this work, we can identify defining characteristics common to its different discourses and practices:

1. A critical reading of the current social order and an in depth inquiry about the role of formal education in it.
2. An emancipatory political intention to confront the ruling social order.
3. A proposition to strengthen the historically dominated sectors who are able to be the protagonists of their own social change.
4. A conviction about how all of these are possible when acting under a popular subjectivity.
5. An urge for generating and applying educational, active, participatory and dialectic methodologies.

Therefore, and for the purposes of this article, popular education is understood as a set of practices, actors, and discourses in education, with the intention of allowing diverse segments of the popular classes to constitute themselves as subjects and protagonists of profound societal change. Thus, to practice popular education is to recognize the political aspect of education, to seek the transformation of society from the grassroots organizations and movements; to work for the creation and development of the subjective conditions that allow emancipatory actions; to be part of a constant transfor-

mation of the actors themselves; to generate pedagogical alternatives, methodologies, and didactics consistent with all these principles.<sup>2</sup>

Nonetheless, a continuous concern in popular education has been its capacity to produce knowledge from and about its contexts, subjects, and practices. Since its origins it has gestated and integrated research strategies in coherence with its political and epistemological choices; however, this concern demanded more appropriate forms to produce social and political knowledge collectively. Consequently, many processes and practices gave rise to multiple kinds of interactions between popular education and participatory research intending to fulfil some of this need (Streck 2009). The presence of Paulo Freire and Orlando Fals Borda as the first presidents of CEAAL confirms this relationship.

This, however, never meant to make of popular education a homogeneous block of ideas, actions, or research practices. In fact, the different political conjunctures of the continent, the particularities of the regions and nations, the diversity in themes and demographics recommend that popular education should be seen as a cultural field or scenario where different positions and concepts co-exist and occasionally enter in tension and conflict. As Marco Raúl Mejía states (199, 277), “in popular education one can find an infinite set of practices with the most varied methodological projects which depart from multiple places and numerous pedagogical strategies...”.

With respect to the historical approaches to popular education, one can recognize at least three phases, each of which is characterized by the dynamics of its regional context, the dominant readings about reality, the fields of action, the privileged actors, and the ways of understanding and applying its educational practices. These phases are:

1. Generation and development of Paulo Freire’s liberatory pedagogy.

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<sup>2</sup> Popular Education practice is usually carried out by small collectives who work as volunteers in associative processes with grassroot groups, and in Non Governmental Organizations (NGOs); experiences of Popular Education can also be found in schools. Some popular educators come from the groups and grassroots organizations themselves; others are professionals who support such processes through the development of workshops, assist in the training of the participants and engage in the investigation of the educational processes.

2. Emergence of the founding discourse of popular education.
3. The re-founding of popular education.
4. The reactivation of popular education in the context of the new popular movements.

The following is a brief description on the role of reflective inquiry and practical research in each of the mentioned phases. Due to their political, epistemological, and methodological affinity, the tendency has been to identify the construction of knowledge from the perspective of popular education with participatory research. In this article, I propose a hypothesis about the predominance of a particular participatory methodology in each of the phases, with the clarification that, as with any periodization, it is not about a univocal or a linear historical reality, but an opportunity of having a key for its reading and discussion.

## **2. Paulo Freire and thematic research**

In the historical balance of participatory research in Latin America, Marcela Gajardo (1985) places “thematic research” as the first research experience committed to social transformation. It was presented by Paulo Freire in the sixties as part of his methodological proposal to educate adults which was known as the “Freire Method”.

Since 1961, this Brazilian educator had been a member of an ecumenical team of intellectuals who founded the Popular Culture Movement; there, Catholics, Protestants, and Marxists worked together in research aimed to reconstruction popular culture and the emancipation of the popular masses through education. As a result of these efforts, Freire offers a pedagogical proposal interested in having the production and communication of knowledge as part of the same process, an education for adults closer to the life of the educatees, a literacy programme that enables the subjects to “read reality to discover their own history”.

As Freire himself points out in *Education as a Practice of Freedom* (Education como práctica de la libertad), initially published in 1967, his proposal was the result of more than 15 years “of practice in the field of Adult Educa-

tion in the proletarian and subproletarian areas, as well as in the urban and suburban areas” (Freire 1969: 97). By the time he formulated this proposal, he had been teaching Portuguese for 20 years and had actively participated in the popular culture (*cultura popular*) and grassroots education (*educación de base*) movements. From his experience of working with teams, he coordinated the adult education programmes from which emerged cultural circles (*círculos de cultura*) and cultural centers (*centros culturales*). On this, Freire says, “we introduced group debates to clarify the situations as well on the actions themselves that derive from the clarification.” The topics in these discussions always came from the adults who had been previously and informally interviewed.”

It was during this experience that he felt the motivation to teach adult literacy using the perspective of cultural democratization, where adults are themselves the subjects of their own education and the conscious creators of their reality. In 1962 Freire and his interdisciplinary team from the *Servicio de Extensión Cultural* from *Universidad de Recife*, in Pernambuco, taught literacy to 300 workers in 45 days; the following year Freire was invited by president João Goulart to do adult literacy throughout the entire country, a process that was interrupted by the military coup in 1964. During his exile in Chile Freire worked in the Institute for Capacitation and Research on Agrarian Reform (*Instituto de Capacitación e Investigación en Reforma Agraria*) (INCIRA), where he systematized his pedagogical proposals in the books *Education as a Practice of Freedom* (1967) and *Pedagogy of the Oppressed* (1969).

A characteristic of the literacy method proposed by Freire is that it is based in the previous rigorous research advanced by experts, and by the people in the process of becoming literate. This research seeks, first, to identify the problems of the local context where the literacy programme will happen; second, to learn about the perception that the participants have of these problems, their felt needs, their aspirations, and their expectations (the thematic universe). Another practical result of this kind of inquiry is the capacity to recognize the words and expressions that synthesized the interpretation of reality that the research group holds (the vocabulary universe), from which a set of words is established as the generators and organizers of the

contents of the literacy programme. In Freire's words (1969: 110). "The interviews reveal the wishes, frustrations, disbeliefs, hopes, and motivations to participate, as well as highly aesthetic moments of popular language".

These words and phrases are the generators and bases for the cultural circles' discussions. They are analyzed by and with the interviewed subjects to organize and create situations meaningful to their experiences. Once the words are defined with their given social relevance and phonetic potential, the team recreates situations which are then applied and codified through simple drawings made into posters or slides (*thematization*). Once these materials are made into codes, as Freire suggests, they should serve to understand in detail the problems and themes presented in the situations, as well as to disintegrate the phonetic families that serve as reference for the words identified as generators.

Beyond the experiences of Freire in Brazil and in Chile at the beginning of the seventies, there were a few other thematic investigations in Latin America: one in Uruguay toward the end of the seventies about representation and popular culture; one at the beginning of the seventies in Peru, and another one in Colombia. The last two were developed in the context of local planning (Gajardo, 1985:13). The experience with major recognition in Latin America and the Caribbean focused on agrarian reform, rural development, and community organizing, and was called Action-Research (*Investigación-Acción*). It was elaborated by the Brazilian sociologist Joao Bosco Pinto, motivated by the principles of the liberatory education of Freire. This mode of Action-Research was a method to "diagnose, coordinate, execute, and evaluate action projects with the purpose to participate in a major social and educational learning process" (Garjardo 1985: 13).

Generally undertaken by institutions and state programmes, the Freirian proposal was premised as an education oriented toward the expansion of the peasant's consciousness and his or her understanding of the implications of historical reality. This expansion was to be possible through access to universal and scientific knowledge and the development of creativity and social organizing skills. Beyond the political limitations, the widespread use of this kind of research was, in many cases, the motivation for many participants to become popular educators (Cuevas 1996).

### **3. The foundational discourse of popular education and the participatory action research**

Popular education emerged in Latin America as a consequence of the discussion and application on Freire's proposals which had been influenced by the radicalization of the popular struggles lived under the narrative of revolution. In fact, the seventies and eighties are known for the rise of community organizations and unionism amongst peasants, ecclesiastics, women, and youth, as well as the formation of leftist parties and political movements.

Popular education is the union of politics and education toward the emancipation of the marginalized classes of society. This union is developed in two ways; first, the politicalization of education when it has objectives associated with political action; second, the making of a pedagogical politics when political action is considered to be a space of learning. Thus, politics and education are taken to reach all spheres of life: we learn from everything, everything is political.

The influence that Marxist thought had on popular educators permitted a structural understanding of society and of transformative social action. However, by taking the conflict between capital and labour, and between exploited and exploiters, as the central contradiction, it led the analysis of the structural reality of Latin American societies to a kind of reductionism. Consequently, popular education began to make itself accountable to the areas considered susceptible to be politicized in as much as they denounced the exploitation and announced the revolution. Daily life, the educatees' cultural experiences, their previous knowledge, were only useful while they exemplified the given postulates, or were simply denied as alienated.

The radicalization of the Latin American political spectrum lived at the end of the seventies was also felt among social scientists. After the enthusiastic adoption of the functionalist approaches for the analysis of positivist research, and the escalation of the social conflicts generated by the capitalistic modernization of the academic world, there came the dissatisfaction of many social researchers who had hegemonic frameworks and had assumed neutrality in science. The influence of Marxism and the progressive commitment of some social researchers with the popular struggle demanded inte-



grated research methodologies capable of articulating the production of knowledge with political and social transformations of the time.

Within this perspective and during the first half of the seventies, the Colombian Orlando Fals Borda, together with his team of researchers, elaborated and applied Participatory Action Research (Investigación Acción Participativa, IAP) from which he supported peasant organizations in the Atlantic Coast of Colombia. This proposal is what Gajardo (1985) has called the sociological stream of participatory research. Based on the reflections and conceptualizations of this research experience, Fals Borda (1979, 1998) summarized the characteristics of IAP in the following methodological principles:

1. Authenticity and commitment from the social researcher toward the popular movements.
2. Antidogmatism. No rigidity in the application or in the methodological strategies.
3. A systematic feed-back to the educatees. Appropriation and development of their critical knowledge for the advancement of their social awareness and language.
5. To communicate in and use the language and communication style of the educatees, respecting their political and educational level.
5. Self inquiry and collective control of the process.
6. Friendly techniques for recollection and analysis of information.
7. Continuous action and reflection.
8. Dialogue and symmetric communication.
9. Historical recovery, understood as a technique to identify and make visible the sense of past that the popular sectors hold.
10. Wisdom and appropriate judgment throughout the experience.

Fals Borda and his team brought these principles to many countries in Latin America and Africa. In 1977 many participatory researchers met at the World Wide Symposium in Cartagena to exchange experiences, solidify their iden-

tity, and evaluate the similarities and differences among the many kinds of research: participatory observation, observation: insertion, action research and militant research.

From that moment on, the IAP presented itself as the most coherent methodology, along with other liberatory practices such as Theology of Liberation and Alternative Communication, thus acquiring visibility within the popular education movement as another accredited methodology for the production of knowledge. This is made evident in the numerous books and materials published that refer to the participatory methodologies used in Adult Education (Schutter 1981; Vio Grossi 1983).

Francisco Vio Grossi, at the beginning of the eighties, manifested a challenge: despite the great potential of participatory research for Adult Education in Latin America, “its findings continue to stay in an initial stage. There is still much to advance in the generation of experiences and in the techniques for ground work” (1983: 33). Maria Cristina Mata offers a similar review for the First Meeting for Action Research and Popular Education in Santiago de Chile 1980: “To talk about action research as a substantial practice within popular education is very common now, however, it is much less common to talk about how it has been integrated into the educational processes” (1981: 114). At the same, she recognizes how the practice of research was still taboo among educators who consider it to be the practice of experts whose goals were just to develop theories and sophisticated techniques.

After a whole decade only a few things had changed. In 1989 Fals Borda co-ordinated a study done through the CEAAL<sup>3</sup> Commission that revealed little increase in the use of participatory methods, emphasizing that it was not even a practice in many of the popular education centers and organizations. Moreover, it also showed that “there is still a lot of insecurity about when and how to apply it in the educational processes” (Nuñez et al. 1992: 68).

The same document affirms that popular education and the Investigación-Acción Participativa (IAP) hold “a shared commitment to understand, recruit, train, communicate, act, and transform, through active participation, the

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<sup>3</sup> Consejo de Educación de Adultos de America Latina (Latin American Council of Adult Education).

foundations of society” (Nuñez et al. 1992: 73). The document concluded that the priority is to train popular educators in the concepts and methodologies of IAP. Still there is no balance about the participatory research done at the CEAAL centers.

#### **4. Recognizing the historicity of the popular world**

Many educational initiatives rooted and consolidated themselves in the popular sectors. This confronted educators’ abstract conceptions of “popular” and “popular classes,” with the reality of working with social collectives who had their very own references of identity: neighbours, women, peasants, youth, afro, etc. The experience called for an inclusive understanding of the cultural and historical singularities, manners, and habits that make up the culture and struggles popular community organization.

In this way, and during the second half of the eighties, various proposals emerged with the intention to “recuperate popular history.” These proposals wanted to distance themselves from the conventional forms and ideologies used to build history. Therefore, many practitioners of popular education, along with some professional historians, proposed to build a “history from the bottom” concept which had already been developed by historians such as George Rudé, Edward Thompson, Eric Hobsbawm and Raphael Samuels.

For instance, Raphael Samuels’ proposal coincided with the IAP on that the protagonists of the labour movement should be the participants of the “history workshops”. Fals Borda, on the other hand, presents “historical recovery” as a technique relevant to the rescue of the testimonials, archives, and historical experiences of the popular sectors. In 1985, and after working with peasants in Nicaragua, Mexico, and Colombia, he writes about the “recovery of the people’s history as ‘the process to put together the selective memories about the social class conflicts through activities of collective memory, individual remembrances, storytelling, and the gathering of documents and objects often kept in the old chest drawers of humble houses’” (Fals Borda 1985: 88).

With this kind of work, the collective recovery of history began to organize itself as a research mode with its own identity, objectives and methodolo-

gies. Its efforts resulted in a simultaneous construction of designs and methodological strategies applied throughout many countries by popular education centres who wanted to proudly expose their set of tools and contributions to the history from the bottom movement (Cuevas 2009).<sup>4</sup>

Based on the critiques made to the character and uses of the history considered official and academic, the new approaches to reconstruct the history of the marginalized classes and sectors of society vindicated the need to activate the personal and collective memory, the subject's capacity to interpret his or her own past, and its multiple forms of sharing (Cedales/Pereson/Torres 1990; Rubio/Valenzuela 1990; Cedales/Torres 2000). Even though there is a lack of rigorous studies on the production of participatory historiography in the popular education movement, it is important to recognize the transitions that have taken place, one being the shift from a disciplinarian focus (a popular history) to a cultural focus (the social memories), and another being the need to move from producing or recovering the "the real history" to construct and strengthen subordinate memories (Torres 2006).

Today there is a growing interest in Latin America to "produce memory" of the recent past, in particular of the repression experienced in countries such as Argentina, Uruguay, Chile and Peru during the military and civil dictatorships (Jelin 2001; Degregori 2003) and the armed conflicts in Central America and Colombia (Serna 2008). In many of these experiences the reconstruction of memories uses methodological strategies borrowed from popular education, complemented with techniques from Psychology, given the emotional impact in facing the traumatic events and processes.

Something similar happens with regard to the process of claiming ethnic identities, in particular those of the indigenous movements in Bolivia, Mexico, Ecuador and Colombia, where there are developed studies for reconstructing their ancestral memories and their struggles (Rappaport 2000). Considering that the various social processes are accompanied by popular educators, the practical traditions of transmission of memory themselves are

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<sup>4</sup> Ph. D. Thesis. Pilar Cuevas (2008). It analyses the cases in the Centro de Divulgacion de Historia Popular (CEDHIP) in Peru and in the Dimension Educativa in Colombia. Other organizations such as ECO in Chile and TAREA in Peru also pushed for processes on historical recuperation.

articulated with the methodologies and techniques of activating collective memory proper to popular education (Jiménez/Guerra 2009).

## **5. The redefinitions of popular education and the systemization of experiences**

### ***5.1 The re-foundation of popular education***

Toward the end of the eighties, popular educators started to express dissatisfaction with their work and their orienting assumptions. Although this preoccupation had already been expressed in Chile several years earlier, now, due to the Soviet's socialism crisis represented by the fall of the Berlin Wall in 1989, the Sandinista regime, and the processes of democracy in various countries of the continent, it was not until 1991 that this concern was able to make it into the agenda of the CEAAL in the Assembly held in Havana, Cuba (Osorio 2004).

For Osorio (2004: 9) the major critique about popular education was how it had become reduced to a community organizing option that lacked a pedagogical discourse, and had remained insensitive to the changes in the political and conceptual context of Latin America and the world. For others, popular education had failed to produce the expected results; it was weak in the systemization of its practices, and did not develop efficient strategies to dialogue with other critical thought perspectives. At the same time, it was also considered relevant that its conceptual approach kept its focus on understanding society, politics, and actors of change, popular culture, and pedagogy.

On a contextual level, some authors such as Mejia (1993) insisted that the world was going not through a superficial or conjectural crisis, but through a period of crisis in which many of the bases and institutions of the modern world were being thrown over; therefore, popular education and the critical thinking movement needed to assume those changes as unavoidable challenges. In Latin America the challenges were even more pressing due to the impact of neo-liberalism on the economy and society.

This general assessment of popular education also exposed the need to have the recent actors and community organizing efforts in Latin American

share their demands, spaces, and expertise. These efforts had challenged the idea of the industry being the one and only source of social conflict, and went beyond the working class and peasant dicotomy to include other popular identities (women, youth, ecologists, human rights activists, etc.) and spaces (neighbourhood life, the health system, the family) in need of attention for their active work.

This inclusivity took many actors – indigenous people, women, youth, human rights activists, and environmentalists – to report from their experiences that the economical subordination in which society had placed them, was not the only source of social tension nor their only motivation for organizing. The social sciences being at the disposition of the new political and social contexts, whether influenced by the renovated versions of the Marxism or other theoretical perspectives, were then pushing popular education to face its own efforts to stretch the reductionist perspectives in use since the seventies and eighties.

Consequently, the new popular educational practices started to institutionalize themselves to generate stable networks of communication, through national and international projects, seminars and continental publications.<sup>5</sup> During the eighties and nineties many small centres of development and research became very influential non-governmental organizations with large budgets and professional teams, some of which were comprised of renowned practitioners of popular education, who were later called on by the new governments to direct educational, social, and local development programmes.

The discourse on society and politics suffered significant transformations; to understand social movements as protagonists of great importance for social change meant a transition from viewing them as forms of revolutionary change to seeing them as part of a gradual construction of a substantial democracy, for instance, the State and the political parties were no longer seen as the only channels of political action. There was not one publication in

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<sup>5</sup> The ecumenical proposal by Comisión Latinoamericana de Educación Cristiana (CELADEC), Peru, (*Cultura Popular Magazine* 1981-1985) had a significant role in the process as did the Consejo de Educación de Adultos de América Latina CEAAL, in Chile.

the last decade of the 20<sup>th</sup> century that did not mention the need to allow popular education to be at the service of the new social movements. For instance, Osorio (1991) suggests that the process of building new subjects and social movements for a new society has been able to bring into being a different way of doing education: an education that comes from the needs of specific social subjects, allied with the immediate interests in the struggle for a better life.

Along with the recent symbolic value of the social movements, and the new social fabric being represented, popular education was also actively informing about the new ways of seeing and doing politics. Thus, the emergence of a grassroots political culture in one's every day life is assumed to be an objective reached through the popular education activity. The priority now is to strengthen civil society and other organizations, rather than getting access to political power through the traditional political parties or through an assault on power.

From an initial experience with adult education in different countries, many other actions emerged with women in areas such as human rights, citizenship education, environmental education and others. These new educators looked for current sources to renew their sense of the work. Paulo Freire was one of the practitioners who in his commitment to always improve and update his work, and after recognizing the limitations of his first proposals, revises and radicalizes his own pedagogical ideas in publications such as *Pedagogy of Hope* (1993).

### ***5.2 Systematization as participatory research***

With regard to the production of knowledge in popular education, two contributions were developed in the nineties: one, how production of knowledge is understood through a re-evaluation of the popular education's classical paradigm; two, the practices led by this kind of production of knowledge that brought a gradual positioning of the systematization of the experiences, now considered legacy of popular education to the field of participatory research.

La Piragua Magazine became the privileged medium to document the questioning and redefinition process undertaken by popular education. For

instance, in the editions number 7 (1993), 10 y 11 (1995), various articles refer to the contemporary changes in the production and circulation of knowledge in the scientific, social, and cultural worlds, and to the implications of a “paradigm crisis” in popular education, and its research practices.

The importance of this documentation was such that CEAAL coordinated two important endeavours during the nineties: an entire publication of *La Piragua* (No. 9, 1994) to make an assessment of the research done on education in Latin America, and a seminar (1996) dedicated to the process for knowledge production in popular education. In this seminar one of the most important discussions focused on the unique characteristics and on the reach of the knowledge produced in popular investigative and educational processes. These documents and many other future publications of *La Piragua* (No. 12 -13, 1996) studied the logic of the popular culture (Mariño, Tabora), the character of the knowledge circulating in the practice of popular education (Martinic), and the growing approach toward qualitative methodologies and techniques for its research (Torres, Infante).

Although the so-called “Systematization of Experiences”<sup>6</sup> began to be a technique used for the production of knowledge since the mid-eighties, it is in the nineties when this kind of activity gains protagonism. Therefore, its method is taken, adapted, and developed by diverse institutions such as the Centro Latinoamericano de Trabajo Social (CELATS), the Consejo Regional de Fomento a la Educación de Adultos, CREFAL (México), the Red ALFORJA (Centro América), the Centro de Investigaciones y Desarrollo de la Educación, CIDE (Chile) and the Asociación Dimensión Educativa (Colombia). Even CEAAL itself created the Programa Latinoamericano de Sistematización, first led by Felix Cadena and later by Oscar Jara.

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<sup>6</sup> In Spanish, the use of the Word “sistematización” had been limited to the process of ordering and organizing information within a research project; in the context when there appears the new meaning of systematization, which is developed in this article, the word was intended to express the idea of “organizing the practice within a system”, “to order experience as a system of stable elements and relations”. From there on, there is the acceptance and difusion of the word which today seems too short to express the richness of meaning which presently characterizes the systematization of experiences.



During this period, meetings, seminars, and systematization workshops become common practice; there are books, magazines, anthologies and manuals published on the theme of systematization as well. The methodology documented presents the integration of a vast spectrum of the projects undertaken by education and socially conscious institutions. Also during the nineties some universities incorporated the systematization of experiences into their social work and undergraduate and graduate curriculums. The nineties ended with a Latin American Seminar in Medellín on systematization practices, co-organized by a Colombian university and CEAAL. There were more than two hundred participants from all over the continent (La Piragua No. 16, 1999).

A common theme in the debates and publications has been the need to present valid arguments for the implementation of this new research mode. Some of the justifications are (Jara 1994; Hernandez et al. 1995; Carvajal 2006):

- Systematizing improves the quality of the practices and a comprehensive reading of these.
- Systematizing permits the sharing of the information extracted with other or similar groups efforts.
- Systematizing offers the possibility of organizing and reusing the material generated in the practice.
- Systematizing enriches the reflections and discussions in the collectives interested in advancing their activism.
- Systematizing serves as a base to conceptualize and generate emancipatory theory.
- Systematizing allows for a recognition and appropriation of methodologies for social change.
- Systematizing empowers organizations and transforms power relations.
- Systematizing allows constant re-organization, and signifies the subjective experiences of the participants.

Systematization can have different emphasis. While some see it as a strategy to organize the educational and social projects (Cadena 1987), others (Bernechea/Morgan/Gonzalez) take it as a self-reflection done by professionals about their own knowledge. Still others insist that systematization possesses, as popular education does, a “dialectic method” in its core; others, however, prefer to see it as a way to develop constructions of language and conversatory patterns that configures the social and popular educational efforts (Martinic/De Sousa/Falkembach).

From the perspective of the Colombian collective, to which I belong, we have understood systematization as “a mode of collective knowledge about practices of intervention and social action which, based on the critical recognition and interpretation of the meanings and logic which constitute these practices, attempts to potentialize and contribute for the conceptualization of the thematic field in which they are inscribed” (Torres 1999: 14). Such a definition involves the central aspects that, in our perspective, characterize systematization, as follow:

1. Intentional production of knowledge. To simply register and share the results of a research is not considered systematizing, for it seeks a recognition in depth and advancement of the knowledge and meanings communicated by actors. Systematizing requires researchers to have a conscious position about the where from, what for, and the how of this social knowledge production as well as a clear understanding of the reach of its incidences. The research team has to be explicit about the reality to be systematized, the character of the knowledge we are able to produce about this reality and the adequate methodological strategy to do it.
2. Collective production of knowledge. Like participatory research, historical recuperation and participatory diagnosis, the systematization process also recognizes the actors as subjects. Without ignoring the work of the external experts, the subjects are those who make the main decisions in the research about the what, the why, the what for, and the how to do it.
3. It is aware of the complexity of the practices, which are the systematization’s object. These practices are much more than the simple sum of objectives, activities, actors, roles and institutional processes. Because they

are conditioned by the political, social and cultural contexts that inform the initial hypothesis, they have the capacity to use the emerging kinds of actors, relationships, institutions, rituals, meanings, and perceptions as feedback to the familiar context while also working with the possible arising contingencies.

4. It seeks to document the process. Systematizing first seeks to produce a description of the experience, then to reconstruct its trajectory and complexity from the actor's diverse perspectives. Multiple techniques are used to provoke the stories that expose the readings, themes, and meanings in the experiences of the actors. These fragments or partial perspectives, sometimes even contradictory, build the narrative that describes the practice of systematization.
5. Critical interpretation of the logic that shapes the experience. Systematizing, besides reconstructing the experience, aspires to explain the logic that gives order to it. In order to reveal the "grammar" that is at the base of the structure of the experience, the team needs to name the external and internal influences, the structural relations, and the cultural codes that give unity and/or are the source of the fragmented versions of the stories. In other words, systematizing should produce an overall reading of the individualized stories and of its approach.
6. It seeks to potentialize the social intervention practice. Along with the cognitive benefits of the systematization comes its methodological compromise to update itself as required by the development of the project being systematized. This continual updating is not done mechanically; it takes place during the entire process so that as the actors gather results, these results may reciprocally inform the dynamics, relationships and readings in the research, should the case need to be reoriented in its focus or approach.
7. Systematizing nourishes the conceptualization of social practices in general. Systematization intends to comprehend the general and particular ideas specific to some of the social practices with the intention of interpreting the material within the appropriate social context. Publishing the

systematization should expand the knowledge available about a specific social reality; for instance, of social movements, popular organizations and popular education. The balance from various systematization processes focused on the same theme can generate deep theoretical reflection.

We can define systematization as the self-reflection done by the subjects who launch the social or educational action in their communities<sup>7</sup>. In order to strengthen and transform it they start by acknowledging what they already have and know for the systematization as well as by identifying their intentional and shared efforts to rebuild it with an understanding of the contexts, factors, meanings and elements that recreate it. Therefore, the systematization is, in itself, an experience that shapes and shares new meanings to the practice and its practitioners (Falkembach 2009).

The systematization of experiences, the IAP and in the collective recovery of history, are modalities that while generating knowledge and meaning about social life, are also experiences in formation. Through these, educators appropriate approaches, strategies, techniques, and a set of research-oriented attitudes that contribute to enrich the quality of their practices, while including the systematizing of their own experiences in order to develop their own popular educator identity. It allows recognizing the limits and possibilities of practices and makes it possible to transform them; as an example, some organizations redefine their lines of action, organize their archives, incorporate new strategies of work and revise their relations with their context.

### ***5.3 Methodological Routes***<sup>8</sup>

As there is not only one method to understand systematization, there is neither one simple way to embark on it as a methodological process. Next, there is a summary of some methodological routes, each with its correspondent phase and stage: points that can be taken separately or together. Depend-

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<sup>7</sup> These are projects of leadership training, of productive solidary enterprises, processes of communitary organization, cultural projects, etc.

<sup>8</sup> This footnote is based on Nydia Constanza Mendoza's article, "The systematization of experiences. Epistemological assumptions and methodological processes", to be published.

ing on the needs of each of the systematized experiences. Also, although each one has its own singularities one will note greater points of convergence than divergence.

The first approach was elaborated by Sergio Martinic (1991, 1998), who recognizes in systematization a mode of social action research taking place within the paradigm of change that characterizes this period. For the author (1999), the systematization practice seeks to build its own descriptive language “from within” to develop a sense and a critical reading of the experiences that will lead toward its very own gradual transformation. From these assumptions he proposes the following methodological route:

- To analyze the contextual aspects that structure and influence any practice toward action.

The intention is to build a space where the meanings and interactions of the processes can be understood as the result of an experience. Thus, the author suggests analyzing the following:

1. The way participants enter the experience.
  2. The nature of the educational institution and its position in a national, regional and local context.
  3. Social relationships, conflicts, and interactions that establish the pedagogic experience with groups, institutions, organizations.
- To make explicit the assumptions that create the bases for the work and which organize the experience.

For Martinic (1999), any systematization seeks to rebuild the logic of the practice through the very same principles and ideas that orient it. Therefore, he suggests elaborating hypotheses that refer to the “predictions” and “searches” that animate the educational actions. The experience and the accumulated knowledge are then taken as premises. The interpretations and cultural conceptions are analyzed to build a new interpretation of what was lived. The hypothesis offers, later on, codes to read and analyze the practice.

- To revise the pedagogical experience to study how it develops within a specific time and space.

This phase proposes to analyze the step by step process of the research, starting from the first gestating idea, passing through its realization, and ending with its documentation. All of them should include aspects such as the time and space of the developments, the sources used, and the institutional and community relations.

A second approach is the one offered by Oscar Jara (1996, 2001), who names the following as the objectives of systematization: to improve and comprehend the practice, to analyze its teachings, and to generate theoretical and generalization processes. He also states that to systematize an experience implies to analyze it as an historical process in which different actors are involved with different views and feelings. This is done to recognize that all experiences take place within a determined socio-economical context inter-related with the institutional stage to which it belongs. Because of this, he proposes to develop the following processes for systematization (Jara 1996):

- To organize and reconstruct the experience.

During this phase the emphasis is on the lived process; therefore, the referential elements are identified, classified and reorganized. The objective is to retrace with the actors the whole experience.

- To recognize the rationality that organizes the experience.

During this phase all the potential influential factors are identified with the correspondent relationships among them. The objective is that the participants of the process try their best effort to distance themselves from the experience at the moments of gathering and analyzing their interpretations and understandings.

- To interpret the experience theoretically.

Once a sense of the experience is established, the conceptual theories underlying it are analyzed and brought to discussion through other conceptual frames.

- To interpret the experience critically.

This is about confronting the results of the first two phases -- the general sense of the experience with its theoretical interpretation. The objective is to

build a critical interpretation of the process in order to transform it. Jara (1996) considers that with this exercise the process finds itself between description and theory.

The third approach is the one developed by the research school, *Memoria, Identidad y Constitución de Sujetos* (Memory, Identity, and Subjects Constitution) at the Universidad Pedagógica Nacional of Colombia, in collaboration with other popular educators who have also worked with systematizing experiences. The stages proposed for the systematization are:

- Building a team and the appropriate research conditions.

This first stage is intended to generate a favourable process by having its research members define the criteria and objectives together. Given the participatory method of the research, this is a fundamental stage to have complete clarity about what and the how of the tasks to follow.

- Reconstruction of the historical trajectory of the experience.

Once the team, the objectives and the criteria are set, the questions, themes, and techniques (i.e. documental consultations, in-depth interviews, discussion groups, workshops, among others) are chosen to generate an accurate description of the experience. At the end of this process there is produced a document, with a full analysis of all the historical moments of the research methodology.

- Analysis and interpretation of the experience.

Once the reconstruction is done, the next stage is to do a transversal reading to identify the recurring themes that appear to be significant in both, the stories of the actors and the descriptive summary. Based on the themes, a first analysis is done, which is discussed by the team permanently and concludes with the creation of a summary.

From this analytical summary a global interpretation about the reconstruction process of the historical and descriptive processes is done. This is to generate new explicative readings, in accordance with the experiences and the different factors, strategies, and logics used. In this way, the decisions resulting from this process can be made legible and evaluated.

– Summary and socialization

Having discussed and worked with both, the descriptive accounts and interpretative analytical axes, a narrative structure is defined to be presented and socialized with a final report as planned in the initial proposal.

**Conclusions: between the accumulated experience and the emancipatory paradigms**

Having made this journey through the links between popular education and participatory research, in particular with the systematization of experiences, it is seen that while the former is a pedagogic movement of continental reach, the latter is consolidating itself as an intellectual and practical field worldwide.

The confluences, synergies and overlaps between them show that we face an epistemological, pedagogical and political challenge: the need for further forms and practices of knowledge production linked to educational processes and emancipation movements. Indeed, this "sisterhood" of cultural practices aimed at social transformation did not always ensure a systematic and rigorous production of knowledge by popular educators. Not even in the late eighties when discussion about the scope and challenges of the research practices were so close to some of the pressing questions and experiences of the researches. Currently, however, it seems that many Latin American social movements and liberatory cultural practices are being revitalized, offering great conditions to re-adopt and enrich the research already committed to advance social transformation practices and critical thinking.

One indicator of this is that since the year 2000, the CEAAL has integrated, as one of its main themes, popular education and emancipatory paradigms. That is, it has accepted the need to recognize the limits of the known ways of thinking and the legacy of the modern project to receive, recreate and generate leads that permit us to remain as a force in the liberatory practice. I agree with Marco Raúl Mejía (2009) in that the reconfiguration paradigm must be fueled by one's own tradition of critical pedagogy, and in particular, from the full force Paulo Freire's work still offers, as well as from the knowledge generated by the systematization and dialogue with others in academia,



and with political and social critics engaged in the same search. The emerging knowledge, generated from the social movements themselves, has been very creative in its forms of action, organization, and thought.

The systematization of experiences has been an important construction and proposition from popular education in the field of research. The production of valuable insights from our own practices and our own knowledge has transcended the work of educational actors and is now embraced in many fields of social action. It is also a platform to conceptualize and re-signify the debates about the emancipatory paradigms that are the base for the unique processes and practices at the hands of the popular educators.

Some recent reflections (Cendales/Torres 2006; Falkembach 2009) emphasize the formative experience of systematization of those who participate in the process, as well as its instrumental character for affirming political options and collective identities. To talk about one's experiences, reconstruct them systematically and generate reflexive processes about them, is a way of strengthening the practices. Once, for permitting the creation and ordering the archives of the group, for challenging to transform practices and work styles, for incorporating new thematics and perspectives, and second for restructuring the internal and external relations of the organizations.

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