



# Grupo Chorlaví

## Building a Social Learning Network 1998 – 2005



# Chorlaví Group

Building a Social  
Learning Network  
1998 – 2005

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Chorlaví Group: Building a Social Learning  
Network 1998 – 2005

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Centro Latinoamericano para el Desarrollo Rural

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This systematization project was undertaken by a team of Rimisp researchers with the collaboration of several others whose ideas helped to improve the team's understanding of Chorlaví Group learning.

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## Preface

Over the past several years there has been growing interest in the learning methods of development organizations. We believe that learning within and amongst development organizations is a crucial requirement for the success of poverty reduction initiatives. However, relatively few well-documented experiences are available. We hope that the content of this document is useful for people working on development and learning. The document describes and analyzes the progress of the initially parallel initiatives of IDRC's Mink'a Fund and ICCO and ALOP's Chorlaví Group, and the cooperative development that led to the formation of what is now the Chorlaví Group and its main tool, the Mink'a de Chorlaví Fund. These initiatives were always facilitated by the *Centro Latinoamericano para el Desarrollo Rural*, Rimisp.

As representatives of support agencies, it has been a great pleasure and opportunity for us to participate in this process. It was a novel experience and we have learned a great deal. It is not common for organizations in the South to share the responsibility of executing programs with financing agencies. This kind of participation allowed us to follow activities closely and participate intensively in discussions and decisions in order to make change possible. We also witnessed the manner in which Rimisp members exercised their role as facilitators throughout the process. As this critical systematization was created by Rimisp, it is understandable that the role of the Rimisp participants does not receive the attention it is due, which is why we feel compelled to briefly shed light on their participation.

The results are no doubt largely due to the professionalism of Rimisp staff. This professionalism was exhibited through punctuality, flexibility, and complete transparency, resulting in excellent management and development throughout the process. Deep knowledge of stakeholders and the rural Latin American context as well as the ability to contribute with ideas in other spaces were key aspects of their professionalism. In addition, the attitude maintained by Rimisp participants throughout the experience was crucial, exemplified by their listening skills and their commitment to learn, improve, and persevere. All of these elements combined to form a foundation that facilitated the project results, including this systematization.

We are excited about what has been achieved to date: the creation of a valuable learning tool and the many lessons learned about natural resource management and rural development. There is still much to do in terms of developing new tools to better spread the results of this type of process to all those who wish to reinforce their abilities and knowledge. These tools should also permit the social organizations, NGOs, and government employees working in rural development and natural resource management to use the results on learning. At the same time, the tools should also facilitate a deeper dialogue between key stakeholders about the social learning process and its role in fair and sustainable development in rural Latin American and the Caribbean.

IDRC and ICCO will undoubtedly continue to be committed to learning for development in work that supports the immense number of rural and poor people who struggle for better living conditions. We hope that this document will serve as a motivating force.

Simon Carter  
IDRC

Maarten Boers  
ICCO

## Abbreviations and acronyms

|         |  |
|---------|--|
| ALOP    | <i>Asociación Latinoamericana de Organizaciones de Promoción</i>                                       |
| CA      | Collective Action  |
| CG      | Chorlaví Group   |
| DEG     | Decentralized Environment Governance   |
| FAO     | Food and Agriculture Organization of the United Nations  |
| FMC     | Mink'a de Chorlaví Fund  |
| FODEPAL | Regional Project for Economics, Agricultural Policies, and Rural Development Training in Latin America |
| ICCO    | Interchurch Organization for Development Cooperation   |
| ICT     | Information and Communications Technology  |
| IDRC    | International Development Research Center  |
| LAC     | Latin American and the Caribbean   |
| NGO     | Non-governmental Organization  |
| NRM     | Natural Resource Management  |
| Rimisp  | <i>Centro Latinoamericano para el Desarrollo Rural</i>   |
| RO      | Rural Organization   |
| RTD     | Rural Territorial Development  |
| SIMAS   | <i>Servicio de Información Mesoamericano sobre Agricultura Sostenible</i>                              |

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# 1. Introduction

The Chorlaví Group (CG) is an initiative aimed at supporting the social learning process focusing on institutional and production transformation in rural, poor, and traditionally marginalized areas in Latin America and the Caribbean (LAC).

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

Its specific objectives are: (a) to facilitate exchanges and dialogues between social agents involved in different points in the social learning process; (b) to disseminate innovative lessons that fight rural poverty and exclusion in Latin America through social learning projects; (c) to promote the use and ownership of social learning processes and products among social agents of sustainable rural development and (d) to systemize the CG's experiences as a social learning network.

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 CG's mission and objectives.

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), which provides grants to projects systemizing innovative experiences; tools based on information and communications technology (ICT), such as: the electronic bulletin InterCambios, the Group's website ([www.grupochorlavi.org](http://www.grupochorlavi.org)), and e-conferences discussing a wide range of topics.

The CG is governed by a Council of eight experts and representatives of sponsoring organizations. The Council has the strategic and planning responsibility of the Group. The CG is financed by the Interchurch Organization for Development Cooperation (ICCO, Holland, [www.icco.nl](http://www.icco.nl)) and the International Development Research Center (IDRC, Canada,). The Group is also sponsored by the Asociación Latinoamericana de Organizaciones de Promoción (ALOP, [www.alop.ac.cr](http://www.alop.ac.cr)). Rimisp, the Centro Latinoamericano para el Desarrollo Rural ([www.rimisp.org](http://www.rimisp.org)), is in charge of the CG Executive Secretariat.

This systematization provides the framework for critically analyzing the process that the CG has undergone since its creation. It is meant to document the CG's development process and identify lessons that might be interesting and useful for other learning networks.

The systematization was based on the following elements: (a) review of the documents produced by the CG and the existing annual monitoring and assessment reports; (b) in-depth interviews with qualified informants related to the CG in different ways (participants in different activities, applicants to the Fund's grants, Council members, donors, Rimisp personnel, etc.); (c) specific analyses of the CG's different tools via in-depth interviews and surveys, emphasizing questions about their usefulness, relevance, and quality and (d) in-depth case studies, including interviews with qualified informants and a literature review of a sample of FMC awardees grouped by country.

This report is organized into nine sections. Following this introduction, Section 2 describes and analyzes CG's origins and development process. Section 3 addresses what can be considered the heart of the CG, that is, the learning cycles or projects. Section 4 shows the tools that comprise the CG. Following that, Section 6 refers to outcomes and impacts. Sections 7 and 8 present the conclusions, recommendations, and lessons learned. References can be found at the end of the report.

## 2. Origin and Development of the Chorlaví Group

### 2.1 The Stages of the Chorlaví Group's Development

#### 2.1.1 Background

The CG was originally based on two activities that emerged independently: (a) the Research Program on Monitoring and Assessment Methodologies for Natural Resource Management Projects in Latin America and the Caribbean, supported by IDRC since 1997 (this initiative financed small research projects focused on natural resource management), and (b) the CG, supported by ICCO and ALOP, which emerged out of a seminar that had the participation of 66 LAC NGOs and Rural Social Organizations.

The general objective of the Research Program on Monitoring and Assessment Methodologies for Natural Resource Management Projects in Latin America and the Caribbean was to improve the ability of LAC societies to define, develop, and implement natural resource management (NRM) strategies that are both sustainable and equitable. Its main tool was the Small Research Project Grant Fund, administrated by Rimisp and governed by a committee of experts responsible for selecting themes, choosing winning proposals, supervising the quality of products, and searching for new sources of support. The project was aimed at creating a multi-donor fund to support research that generated and implemented new knowledge to improve NRM decision-making in LAC societies.

The Chorlaví Group emerged from a meeting held at the Hacienda Chorlaví in Ibarra, Ecuador, in October, 1998, with ALOP and ICCO support. This meeting brought together representatives from 66 ROs and NGOs based in 17 countries. The meeting's objective was to gauge stakeholder interest in establishing a system for sharing experiences in rural development projects and programs, and in establishing relationships with other stakeholders (Chorlaví Group, 1999).

### 2.1.2 Start-up

In December, 1998, ALOP and ICCO held a public bidding competition for projects to establish an information sharing system for agriculture and sustainable rural development in LAC. Rimisp was selected to develop this initiative and thus the CG was created. At this stage, the Group's objective was defined as generating knowledge to strengthen the abilities and understandings of stakeholders and institutions involved in sustainable agriculture and agricultural development. By doing this, it aimed to improve the quality, relevance, and efficiency of development proposals, with special emphasis on rural areas where the majority of the population lives in poverty.

Upon its formation, the Group relied on two tools: (a) ICT-based communication to stimulate sharing, comparative analysis, and electronic documentation of strategies, methods, and tools used in LAC NGOs and ROs, and (b) the Chorlaví Fund, a grant fund for co-financing projects oriented toward systemizing experiences in certain thematic areas. The organization of the Group at this time reflected the thematic work groups formed during the Chorlaví seminar: land tenure, agro-industry and marketing, micro-regional development, rural financial services, farming organizations, and production systems.

A Council supports and strategically directs the CG, making recommendations that are implemented by Rimisp, the Group's Executive Secretariat.

As for the research program supported by IDRC, research projects were chosen and carried out based on winning proposals from the Small Projects Fund's first grant competition. The process ended with the publication of a book entitled *Monitoring and Assessment of Natural Resource Management* containing reports that presented each research project's results and a comparative analysis of all projects (Berdegué et al. 2000).

The primary achievements accomplished during the start-up period can be summarized as: (a) experience in designing and operating the grant fund for projects via an efficient and transparent process, open to the widest possible range of organizations; (b) development of a set of ICT tools such as e-conferences, electronic lists for online discussion, and circulation of literature relevant to topics of interest; (c) identification of a niche wherein the Group could develop its learning and experience sharing proposal, and (d) networking with individuals and organizations in most Latin American countries, resulting in a solid participation base.

The main weaknesses of the start-up period related to the wide range of themes and low level of accuracy in competition invitations, which created multiple and wide-spread dialogue spaces that could not be adequately synthesized. The result was a wide array of documents and activities that were marginally relevant due to far-reaching scale of the e-conferences, but which had no impact on ROs, the academic field, or public policy debates. This led to the conclusion that learning objectives focused on responses to set and well-founded questions must be adopted.

Similarly, we found that, in practice, thematic work groups duplicated already existing formal or informal networks; the agenda of the Group therefore needed to be oriented towards cross-cutting topics. In addition, the Council's terms of reference and working methods resulted in unequal participation amongst members as well as confusion regarding the spheres of responsibility of the governing body and the Executive Secretariat.

### 2.1.3 The First Three Years

Upon completion of the CG's start-up phase, a new project was developed (2001-2004). The objective at this stage was to facilitate the development of new skills to improve policies and initiatives concerning sustainable agricultural and rural development. The specific objectives included renovating the CG Council, broadening membership by inviting the region's main rural civil society organizations and networks, defining more precise themes, supporting the systematization of innovative experiences in sustainable agricultural and rural development, facilitating comparative analysis of innovative experiences, and communication of conclusions.

The agenda was defined by consulting important members and leaders of networks, NGOs, ROs, governmental organizations (including municipal governments), international organizations, academic institutions, and private companies, as well as individuals and organizations that participated in the CG. The criteria were maintained and perfected over time.

The FMC was created to support the systematization of experiences. The FMC came about through the merger of the two grant funds in order to streamline efficiency and increase participation in the systematization. However, the FMC was given its own governing body, independent of the CG directorate. Separate FMC / CG governance was done for two reasons: first, the need to build trust between two organizations that had not worked together before – ICCO and IDRC – with different, albeit complimentary, traditions and missions. Second, IDRC

restricted financial support to the FMC rather than including other CG tools. The complexity of this arrangement required careful and transparent management by the Executive Secretariat and, in particular, a great deal of flexibility and good will amongst CG Council members and the FMC Committee.

At this stage, the Group relied on a website supported by different dissemination and exchange tools and the *InterCambios* Bulletin. *InterCambios* was edited in association with FIDAMERICA, a learning network of rural development and poverty reduction projects supported by the International Fund for Agricultural Development, IFAD.

Consolidation of the FMC – which involved improving recognition and convening capacity, as well as enhancing procedures and working methods – is one of the main achievements of the first three years of the Chorlavi Group's existence. The CG was publicized through its e-conferences, which allowed idea sharing amongst hundreds of participants. Readership of the *InterCambios* Bulletin reached over ten thousand subscribers. The website is widely recognized and used by NGOs, ROs, and academics interested in LAC's rural issues.

The main weakness of the first three years related to the complexity of the parallel governance systems of the Group and the FMC, which hampered the Fund's integration with other CG tools and resulted in the co-existence of related, but not clearly connected, thematic agendas.

Similarly, a virtually unlimited competition invitation open to all types of audiences and private organizations made it difficult to pinpoint the "target group" or "target population". This problem was exacerbated in the process of identifying the theme for designing and launching the FMC's annual systematization grant competition. Often, the themes chosen by the Group corresponded to more general and abstract questions as opposed to more practical and applicable topics.

In addition, although the quality of electronic communication and tool sharing improved, clear limitations surfaced in terms of impact, especially where the goal was not only communication or dissemination, but also learning.

These strengths and weaknesses in the CG's origin and development were analyzed at a face-to-face meeting between the CG Council and the FMC Committee, held in Lima in February, 2004. During this meeting the following four central questions were discussed and provided further input for the Group's second three-year period: (a) what is the added value of the CG?; (b) who are the CG's target users or population?; (c) how can CG's different tools be integrated to improve the quality and efficiency of the social learning process? and (d) how can the CG's governance system be improved?

### 2.1.4 The Second Three-Year Period

Based on analysis of the CG's strengths, weaknesses, added value, and niche, the proposal for the second three-year period integrated several improvements, some of which are highlighted below:

- a. The Option for Social Learning as a central concept in CG action. Social learning is defined as a learning process with the following characteristics: (i) stemming from and being based on critical reflection of innovative transformation experiences in different environments or dimensions of rural societies; (ii) combining the space for private experiences with the space in which the lessons from these experiences can be mainstreamed; (iii) serving and striving to influence catalysts for change; (iv) employing methods to develop potential and creativity among stakeholders involved in learning, making the formation of new relationships viable; (v) mobilizing players that operate in joint spaces to support each other and support initiatives already underway; (vi) operating on a regional level (continental); and (vii) being multisectorial and responsive to reflections and thematically-specialized organizations.
- b. Main CG focus on facilitating learning processes that involve catalysts for change – people, groups, or organizations – that with their actions and/or ideas are creating new ways of thinking and creating change in rural societies, contributing to a broadening of current limits in knowledge, practice, and policy.
- c. Definition of a conceptual framework to shape the thematic agenda for 2005-2007. This framework was defined in the following manner: “*The CG's activities will focus on 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*” (Rimisp, 2005).
- d. Learning projects as the CG's basic work units. A learning project is a set of systematization, critical reflection, dialogue, communication, and documentation activities that, through a systematic, analytical, and comprehensive process, aims to answer questions raised around a central theme.

The work unit – i.e. the learning project – is comprised of the following stages and components: (a) identification of priority themes via consultation with catalysts for change; (b) synthesis of knowledge and existing experiences related to these themes and, based on this, the formulation of learning objectives and critical

reflection (systematization) processes based on experiences that illustrate the prioritized themes; (c) comparative analysis of systematization results in order to extract lesson conclusions, and recommendations; (d) communication of results and (e) capacity-building via distance learning and other learning methods.

The following table (Table 1) presents a summary of the stages in the history of the CG.

Table 1. Key Stages and Milestones in Chorlaví Group's Development

| Year      | Stage  | Key Milestones   |
|-----------|--|--|
| 1997/1998 | Group background                               | <ul style="list-style-type: none"> <li>- Research Program on Monitoring and Assessment Methodologies for Natural Resource Management Projects in Latin America and the Caribbean, with IDRC funding; first experience with a small project grant fund.</li> <li>- Seminar held in Ibarra, Ecuador (at the Chorlaví Hacienda), organized by ALOP and ICCO, to discuss experience sharing mechanisms between NGOs and ROs.</li> </ul>  |
| 1999/2000 | Group start-up                                 | <ul style="list-style-type: none"> <li>- ALOP and ICCO select Rimisp via a public bidding process to implement a pilot plan for the Chorlaví Group's development.</li> <li>- Pilot project implementation.</li> </ul>  |
| 2001/2004 | The Group's first three years                  | <ul style="list-style-type: none"> <li>- Merging of the Minka Fund (supported by IDRC) and the Chorlaví Fund (supported by ICCO and ALOP), forming the FMC.</li> <li>- Joint launching of the InterCambios Bulletin with FIDAMERICA.</li> <li>- Launching of the CG and FMC web sites.</li> <li>- At the end of 2004, the CG Council and the FMC Committee meet extensively to reflect on the experience and draw lessons for the design of a new stage of the Group.</li> </ul> |
| 2005/2007 | The Group's second three years (current stage) | <ul style="list-style-type: none"> <li>- Merger of the CG Council and the FMC Committee in a single governing body (CG Council).</li> <li>- Definition of a central learning theme for the three year period.</li> <li>- Definition of social learning projects as the Group's main strategy.</li> <li>- Detailed definition of the Group's target population.</li> </ul>  |



## 2.2 Highlights of the Chorlaví Group

As explained in the previous section, the Chorlaví Group journey has been a very dynamic process of innovation and “adaptive management.” It exhibits a rapid and informal process of constant reflection and decision-making based on the problems, successes and “surprises” encountered en route – supported by annual assessments of the CG and its tools – and critical analysis of concepts, strategies, and stakeholder responses. Throughout CG development, the following aspects emerged:

*The conceptual framework.* “Experience sharing” developed into organizational learning and later into social learning.

*The thematic agenda.* Six well defined themes were a starting point that provided a thematic opening based on annual independent definitions, which in turn, facilitated the definition of a framework theme for the three year period that links the learning projects launched each year.

*The tools.* Transition from the Chorlaví Fund and initial IDRC Fund projects to the FMC resulted in a stronger funding tool. This tool is improved each year, as is evident in changes to the operational guidelines. Over time, other tools emerge which introduce new skills and capabilities that support learning processes and broaden user and stakeholder networks. A continuing issue was how to improve the links amongst different tools before the learning project theme was chosen.

*The users.* At the outset, the target population centered on thematic work groups. Shortly afterwards, it was concluded that this duplicated the work of other networks and emphasis was instead placed on providing support and services to a population broadly and vaguely defined as NGOs and ROs. One concern during this stage was how to reach “invisible” NGOs and ROs, i.e. those that are not integrated into the more or less formal international circuits. The many problems resulting from such a broad and vague definition of CG users resulted in the decision that catalysts for change would be the primary “owners and users” of the CG. However, the CG retains its obligation to disseminate the partial and final results of learning projects amongst the broadest possible group of NGOs and ROs interested in rural Latin America. This participation and adherence from different CG audiences and stakeholders aims to introduce the inputs and points of view of multiple players in rural development, at the same time addressing the quality of their participation.

*Governance and management.* An ongoing concern was the establishment of a governance system – council or committee -- able to strategically and programmatically direct the CG without transforming it into a weighty and burdensome bureaucracy. Similarly, at the Executive Secretariat level, ways to continually improve the quality, efficiency, and transparency of the process have been sought, ensuring the widest possible participation while maintaining low administrative and working costs so that the largest share of funds is invested in the activities. The fundamental criteria are for the CG to be a network or platform focusing on activities with minimal and simple administrative "apparatus".

## 3. Learning Cycles and Projects

### 3.1 From Organizational Learning to Social Learning

The CG focuses on learning using networks that rely heavily upon electronic communication. Since the audience is dispersed and unspecified, specific features, both in terms of learning and assessment of potential achievements, emerge.

"Learning in action" results from the practice of implementing a program, project, or initiative that produces knowledge: the so-called lessons learned. This knowledge is applied to improve in-field implementation (mainstreaming) and to contribute to the greater body of knowledge on the learning cycle theme (Guijt et al. 2002).

From this point of view, the CG has evolved. The first three-year project aimed to facilitate organizational learning in order to improve initiatives focusing on poverty alleviation, modification of exclusion systems, promoting sustainable rural development, and improving natural resource management. The idea was a response to the need to facilitate learning processes in public and private organizations whose actions affect inequality, rural poverty, natural resource management, and sustainable rural development (Rimisp, 2002).

Organizations have the ability to learn through the individuals they are comprised of; therefore, the training and development of such individuals is critical in order to create the potential for organizational learning. This type of learning leads to innovation and processes of change in the attitudes of personnel within the organizations.

Social learning focuses on determining the extent to which individuals learn from observing what happens to others, in addition to their own direct experience. Social learning is the way in which individuals gain knowledge – knowledge that modifies their cognitive and behavioral structures – through socialization and interaction with other individuals in a defined socio-cultural and physical context. This type of learning is centered on processes of social interaction upon which people acquire and build knowledge, rather than focus on an individual person (Suné Torrents, 2004; Urquijo et al. 1998).

The project that is currently underway proposes that, "the Chorlavi Group's general objective is to promote and facilitate decentralized processes of social learning aimed at enriching the quality and strengthening the effectiveness of the transforming initiatives in rural societies in Latin American and the Caribbean, in relation to a defined thematic agenda of rural sustainable development (conceptual framework)" (Rimisp, 2005).

The evolution from organizational to social learning is a qualitative leap that better reflects the platform's characteristics, especially concerning the process of generating and adding value to knowledge gained in the learning cycles. Both the recovery of empirical knowledge and the participatory tools used, model the specific knowledge and contribution to thematic development of individual experiences. As such the final result incorporates social conditioning and the context in which knowledge is produced and analyzed, which form the basis of learning.

### 3.2 The Chorlavi Group's Learning Cycle

The concept of “learning cycles” was established early in the first three years of operation of the Chorlavi Group. This concept is that the Group puts into practice a succession of activities in order generate learning processes that stem from critical reflection on rural development experiences. Both the practice of these activities and the analytical efforts facilitate stakeholder learning at different times and on different levels.

A learning cycle is comprised of different stages: the construction of a conceptual framework, a body of knowledge based on the systematization of experiences; the enrichment of the analyses and concepts through the participation of many stakeholders; a thematic synthesis based on concepts and experiences; and, ideally, a training scheme for practitioners of, and stakeholders in, rural development issues. In terms of CG projects, these cycles last almost two years, use all CG tools, and directly target learning toward the audiences and participants identified by the CG.

The cycle begins with the identification and clear definition of a central learning theme. In the case of the CG, defining the learning axes has varied at each stage of CG development. In the start-up phase, themes were defined in the workshop held by ICCO and ALOP. During the first three years, the theme selection occurred yearly via a broad consultation process that was finally approved by the CG Council, which drew on the expertise of researchers, development agents, social organizations, and NGOs. For the second three years, themes were identified through consultation with catalysts for change within the sphere defined by the tri-annual conceptual framework. The result of the consultation was analyzed and

approved by the CG Council. This procedure was rigorously applied in 2005, but also faced the challenges mentioned earlier related to the type of questions and type of people using the results. Local organizations aspire to make more "down-to-earth" recommendations relative to institutions and people more focused on the realm of public policy or social research.

Once a central theme is identified, the CG invites organizations to participate in the competition for systematizing FMC experiences. This invitation, which is widely advertised via electronic means, is based on publicly known procedures and rules previously approved by the CG Council. This facilitates selection of the best systematization proposals based on project quality, innovative aspects of the experiences, connection with ongoing work, and qualification of the institutions and professionals involved. Once the winning proposals have been selected, field work begins and is later completed by the rural communities who are in charge of the experience. Communities are often accompanied by NGOs or researchers from universities or research centers in conjunction with heterogeneous institutions. This process is encouraged by the CG.

Following the systematization of specific experiences, a synthesis is done, which consists of identifying the main elements of each experience and looking for common elements that lead to the formulation of lessons and recommendations that can be applied to other situations. In other words, it is an exercise that strives to go beyond the particulars of each experience and discover more general, overarching issues. This stage includes an e-conference that seeks to enrich the synthesis and is open to all interested parties.

After the synthesis stage, different strategies are used for communication and capacity-building amongst different organizations and people involved in rural development. In general, electronic dissemination, the publication of articles, training workshops, and distance learning courses are used. New tools are under consideration for 2005-2007, such as learning tours and other innovative communication initiatives. Another aspect of this effort – though not directly managed by the CG – involves communication amongst organizations that have participated in the process and, especially, in the systematizations supported through the FMC.

Figure 1 is an illustration of the Chorlavi Group's learning cycle, showing the different times that the CG tools are joined together in the learning cycle. This set of activities, based on ICT and face-to-face tools, creates the learning project, as explained in the following chapter.

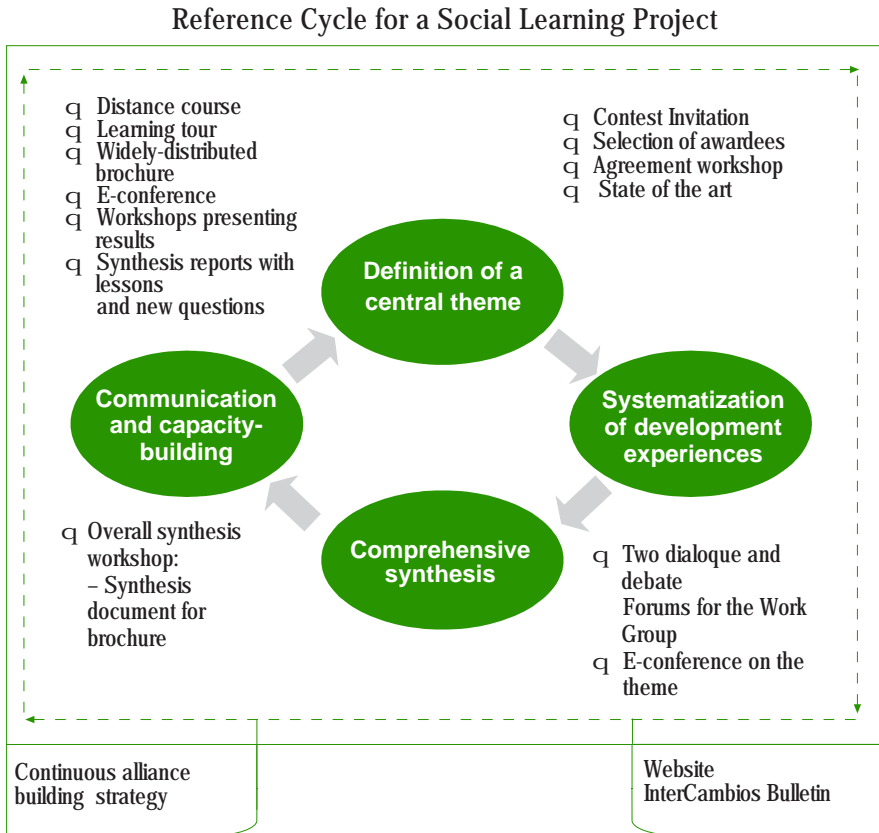


Figure 1. The Chorlavi Group's Learning Cycle.

### 3.3 From Cycle to Learning Project

The cycle illustrated in Figure 1, describes the organizational learning strategy of the CG's first three years. During that period three cycles were completed on the themes of Collective Action (CA), Rural Territorial Development (RTD), and Decentralized Environmental Governance (DEG).

A remarkable element in the results assessment at this stage in the project was that participation and valorization of different CG tools varied depending on the type of stakeholder. For example, 47% of those who participated in the Fund's competitions with winning systematization proposals found the conference discussions and conclusions to be 'very relevant' or 'relevant', in contrast to 85% and 68% of participants and bulletin users respectively who evaluated the conference, illustrating that those who are more involved with the systematization also find the final e-conference activity less useful.

The cycle on RTD closed with several modifications to the previous cycles, including the identification of common themes and collective tasks amongst researchers in order to ensure that they contributed to the theme selection and the establishment of a closed network in which the technical teams systematizing the network also participated and shared experiences. In the assessment, the changes were highly valued by the systematization teams who especially appreciated the sharing and mutual assistance on themes of common interest, methodology, and systematization.

Later, in the DEG cycle, a second face-to-face meeting was held with the contest winners towards the end of the systematization process. This new activity was suggested and financed by the participants with the goal of finalizing the group products, as well as continuing and refining experience sharing and work methodologies.

The weakest points identified during the first three years were: (a) the relatively long time lag between the beginning of the experience systematization projects and the value-adding activities such as the final e-conference and the overall synthesis; (b) isolation of the people working on the systematization from the experiences; (c) the lack of closer technical support for coordinators of the systematization proposals and (d) the poor quality of the final reports. The proposal for the second three years aimed to address these weaknesses, transforming organizational learning strategies into social learning, correcting flaws, and strengthening the positive points from the CG's previous experience.

The change from learning cycle to social learning project not only implies greater precision in the learning objectives, but also the integration of all CG tools. In addition, it also meant improved connections between different types of participation, emphasizing integration of the catalysts for change at different stages in the work. One proposal is that this set of measures for improving the quality of the Group's products may also result in an improved and more accurate definition of the different stakeholders using the results of each social learning project, thereby responding to the weaknesses found in the previous stage.

### 3.4 Stakeholders

An aspect closely linked to the learning cycles relates to the characteristics of work done through ICT applications. For the CG, the ICT applications have involved an evolutionary networking process with the participation of different audiences reached via different tools. However, the second three year period aimed to focus participation on a better-defined target population: catalysts for change.

The original proposal made during the CG's start-up phase sought to include less visible NGOs and ROs. Analysis of the outputs when the proposals for the first three-year project were prepared indicated that the less visible NGOs and ROs do not prioritize experience sharing and international dialogue. Instead, their main connections are national and, in a limited sense, sub-regional. The only interest in international connections expressed by these groups related to access to new funding sources. In addition, most organizations in this category were not connected to the Internet in the late 1990s.

Many of these organizations were part of formal and informal networks on a national and/or sub-regional level. This led to the proposal for a strategy connecting the main organizations within networks. This proposal was altered by the Executive Council that reviewed the CG's target population, clarifying that the emphasis in reaching less visible organizations should be modified to reaching organizations that in some way could be considered "nodes" for formal or informal networks, so that these groups could circulate information and knowledge or form opinions. This decision resulted in the wider, but more diffuse target population with whom the CG worked over its first three years.



After the experience of the first three years, it was considered necessary to redesign the strategy surrounding the target population and transition toward a more precise target group, attempting to establish a more direct relationship with those who might be able to “mainstream” the learning systemized by the CG. In order to accomplish this, catalysts for change were introduced as the target population for the second three year period. The role of this target population is to indicate the priorities of the social learning process through direct participation in consultation and dialogue.

In addition, the CG website was created during the first three years, with more than 900,000 hits annually. A list of over 2,000 email addresses of people interested in participating in e-conferences was compiled. In addition, the *InterCambios* electronic bulletin – a monthly publication – was launched and today has more than ten thousand subscribers. These components continue in this third three-year period, allowing the wide, albeit diffuse, participation of different organizations and individuals interested in the CG’s themes and results.

The website, e-conference list, and the bulletin all reflect a very heterogeneous audience. While it is difficult to articulate this audience’s main characteristics, it can be described as relatively dynamic and demonstrating continual growth over time. The audience can further be described as passive since its interaction with the CG is low and its main activity is to receive or search for information and documentation available in the *InterCambios* bulletin and on the website.

In addition, since the CG began, another audience with different characteristics has surfaced – this one composed of technicians and institutions with interests related to the themes and competitions that are offered annually through the FMC. This audience is fairly homogeneous, with more defined characteristics and a relatively high level of participation in the case of awardees.

Deliberate efforts have been made to more fully integrate the CG’s different audiences. For example, users of the FMC were encouraged to take more advantage of the communications tools available and efforts were made to ensure that themes stem from the experiences of Fund users. This task, however, is not easy; only a small

fraction of non-selected applicants continue to participate actively in electronic deliberations regarding the theme under which they apply. Also, large-scale participation in activities like e-conferences inevitably leads to the generalization of analyses and blurring of details that are of interest to those discussing their own experiences with the rest of the audience. The catalysts for change, the new target group for the CG, must now be added to this scenario; they should work to alter the platform and tools to better serve the intended group of people and their organizations.

In summary, the creation of an open electronic network for social learning cannot only focus on a clearly defined and identifiable target population when the network focuses on social learning based the experiences of rural societies. The design of CG tools and the social learning cycles appeal to different audiences, whose involvement in the learning cycles enrich the knowledge created. This is an elements that has drawn a great deal of attention within the Group. An adequate solution to this tension between themes, users, and participation via different tools, is crucial to ensuring that the work of the CG has an impact on those engaging with it.

## 4. The Chorlaví Group's Tools

### 4.1 The Group's Tools at Different Stages

During the CG's start-up phase, two instruments supported the learning strategy: thematic groups and e-conferences. It was assumed that the thematic groups would develop electronic discussions on specific themes; however, this only occurred in three or four of the six groups. This was explained by the fact that participants were already involved in other formal or informal networks on the same themes. The discussions were supported by small systematizations assigned through the Chorlaví Fund.

The FMC was formed during the first three years of the CG and was meant to be a tool to aid in CG organizational learning strategy. During this stage, the CG website was created as a space for consultations and communication, not just for results of FMC systematizations and e-conferences, but also as a place where current information could be found that was relevant to organizations and individuals interested in rural development in Latin America. Likewise, over the first three years, the *InterCambios* electronic bulletin was launched and the first distance-learning course was held on Collective Action and Rural Development in FAO - FEDEPAL agreements.

For the second three year period, three additional activities were considered to be tools for CG's social learning strategy: a leader or facilitator for the social learning projects, learning tours, and workshops where the results would be presented and discussed with interest groups. These new tools aimed to strengthen the dissemination and mainstreaming of CG results.

## 4.2 The Mink'a de Chorlaví Fund

The Chorlavi Fund was created in the CG's start-up phase as an open fund focused on generating new knowledge via systematization and local experience sharing activities. From that point onwards, the Fund has supported value adding activities through cooperative and inter-institutional joint initiatives. Institutions interested in systemizing experiences and sharing their experiences, analyses and documentation of this new knowledge, can apply to the Fund. The proposals must show diverse collaboration and cooperation, meaning that they must include institutions of different types from different countries, or institutions specialized in distinct themes with differing schools of thought. The goal is meant to ensure the convergence of different perspectives, several research approaches, and applied work similar to the institutional heterogeneity that formed the CG and the Fund at the outset. With these criteria, the first five projects were approved and launched activities at the beginning of 2000.

Over the first three years, the Chorlavi Fund, supported by ICCO and the IDRC-supported Research Program on Monitoring and Assessment Methodologies for Natural Resource Management Projects in Latin America and the Caribbean's Grant Fund, merged to create the FMC. The FMC continues to be a CG tool, but with a new institutional arrangement wherein the Fund Committee provides leadership, makes major decisions, approves guidelines, and selects the winning proposals for each competition, amongst other responsibilities. As such, two separate governing bodies were established – one for the FMC and another for the CG.

It must be noted that the competition is publicized via electronic means, both on the CG and FMC websites and in the *InterCambios* bulletin, as well as through other electronic mailing lists of CG users. Overall, the participation response to each competition is highly satisfactory. Over 90 proposals are received on average each year, involving more than 120 organizations and approximately 12 to 15 countries in the region in each round.

An ongoing component in the dynamic process of designing and managing the FMC has been the commitment to maintain very clear and strong mechanisms that ensure the competition's transparency. Announcements for the competition publicly state eligibility and assessment criteria for the selection of winning proposals. Each eligible proposal is reviewed and analyzed independently by two

anonymous evaluators, and in the case of important differences between the two initial evaluators, an “arbitrator” is brought in. The Council reviews and certifies the evaluation and scoring process. Likewise, the Council makes final selections using strict, score-based criteria, with pre-established, objective provisions to correct eventual imbalances between geographic regions and types of organizations.

For the second three-year period, the FMC underwent important modifications: (a) a merger of the councils governing the CG and the FMC into a single Council that directs strategic and planning strategies; (b) selection of an external consultant by the Council, independent of the Executive Secretariat, who directs the evaluation, and monitors and certifies the qualifying process of the FMC competition (Monitoring permits a transparent, objective, and impartial process); and (c) the introduction of mechanisms –always within the limits of score precedence – related to the selection of FMC awardees, with the aim of correcting eventual imbalances as to the type of winning organization and geographic zone.

The correction of these imbalances has been a constant concern. Initial results led to the conclusion that certain types of organizations, like ROs, and some sub-regions –especially Central America – tended to be under-represented among awardees. In 2003, a special effort was made to promote the competition in Central America, in an attempt to involve more ROs from this sub-region. The following promotional activities were undertaken:

2003. Publicity raising workshops presented by a consultant in Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua. As a result, applications from this region increased from 10% in 2002 to 14% in 2003 (Escobar et al. 2005).

2004. Competition publicizing the workshops in Central American countries (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama), led by the same consultant. The percentage of participation for Central American countries remained practically the same this year as compared to the previous year (Escobar et al. 2005).

2005. Publicity raising workshops in Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua, led by an NGO – Mesoamerican Information Service on Sustainable Agriculture (SIMAS) from Nicaragua – with reinforced dissemination of information via electronic means. A CG technician was present at two of these workshops. This round proposals from Central America accounted for 18% of the total received.

In sum, participation from Central American countries has almost doubled over the period 2003–2005.

### 4.3 E-conferences

The CG held a total of 12 e-conferences. On average, one e-conference produces over 150 messages from participants and is followed by more than 1,500 people. The list of conference themes to date is as follows:

1. Experiences of poor, rural areas in accessing dynamic markets (two conferences).
2. Decentralized environmental governance in rural areas of Latin America and the Caribbean.
3. Rural territorial development.
4. Rural poverty, income distribution, and social policies in Latin America and the Caribbean.
5. Land constitution and scheme.
6. Collective action and improvements in the living conditions of rural populations.
7. The coffee crisis: causes, implications and response strategies from rural communities.
8. Farmer access to organic markets.
9. Rethinking rural finance.
10. Land reforms and land markets.
11. The multi-use character of land and agriculture.

As shown in graphs 1 to 3, evaluation of the past four years of e-conferences via participant surveys indicates that a high proportion of participants read all or most of the materials shared during the conference. Ninety-six percent of those who read the messages find the content 'very useful' or 'useful'. A little over 76% of those who responded to the evaluation survey considered the quality of the e-conferences to be 'good' or 'excellent'. These criteria are based on comparisons that the participants make between the material from CG conferences and that of other e-conferences run by rural development agencies.

In summary, the e-conferences are extremely important in meeting the CG objectives, for at least two reasons: (a) the use of “two-way” communication and dialogue within the learning projects and (b) the large number of participants. Clearly the e-conferences contribute to the platform’s interactive network.

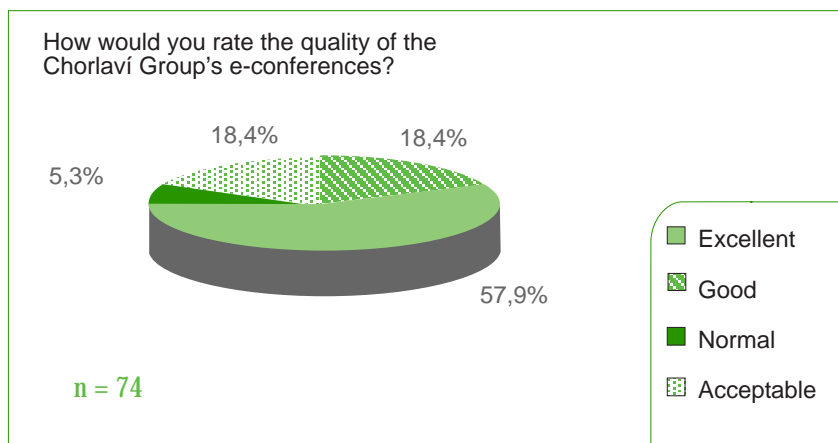


Figure 1. Perception of the quality of the Chorlavi Group's e-conferences.

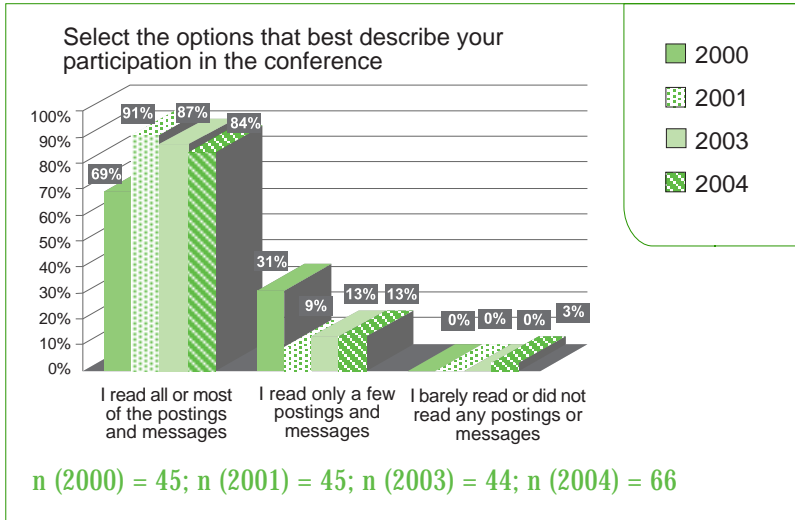


Figure 2. Participation in the Chorlavi Group's e-conferences.

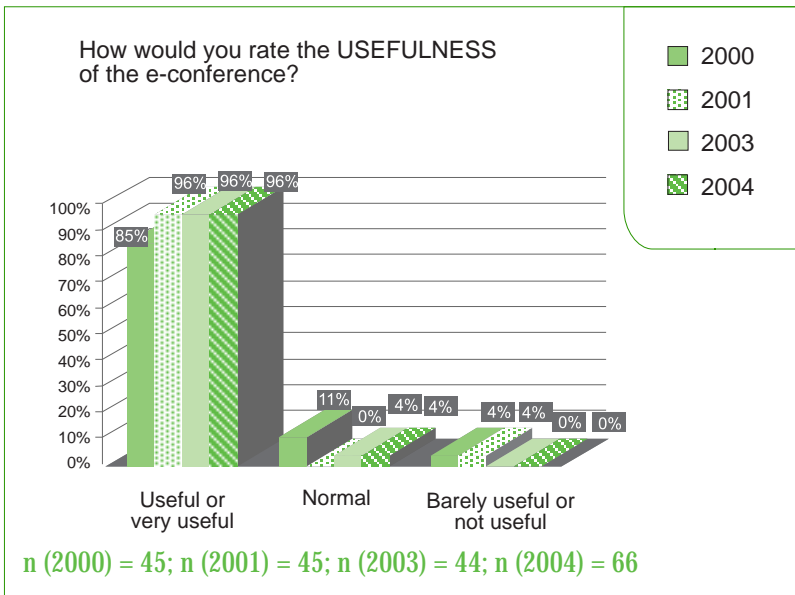


Figure 3. Perception of the usefulness of the Chorlavi Group's e-conferences.



## 4.4 The InterCambios Bulletin and the Chorlavi Group Website<sup>1</sup>

Regarding the *InterCambios* electronic bulletin, Figures 4 to 7 illustrate regularity of readership, usefulness of the newsletter, and relevance of the themes analyzed in the monthly editions. These results indicate that a high percentage of those who read the newsletter (67%) find that it helped them to improve their work performance. Additionally, 82% find that the newsletter's themes are relevant to the institutions where they work.

Opinions as to the quality of the newsletter are illustrated in Figure 4. Over 54% state that the quality is 'excellent'. More than 70% compare the newsletter with publications specializing in rural development when evaluating the quality of the *InterCambios* bulletin.

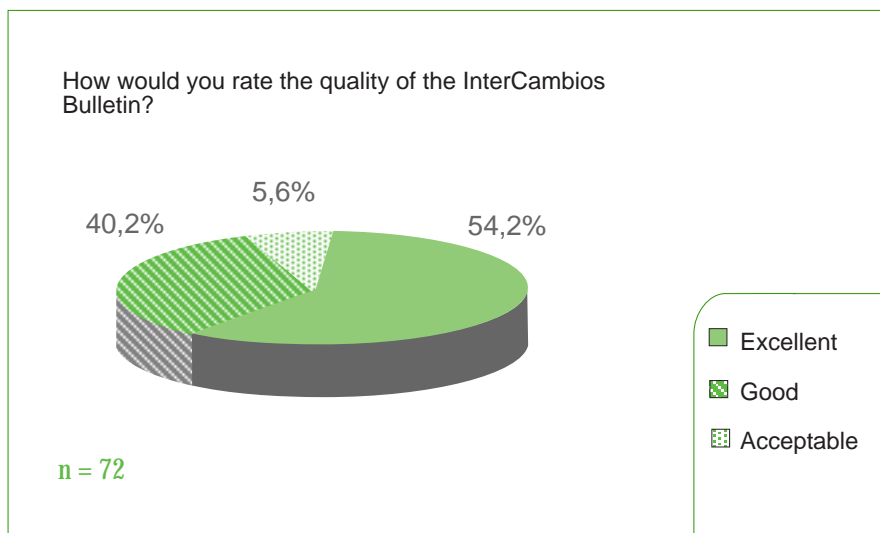


Figure 4. On the quality of the *InterCambios* Bulletin.

<sup>1</sup> The results presented here could be biased in the sense that those who participate, and therefore those who complete the evaluation, are people who are interested in the topic raised.

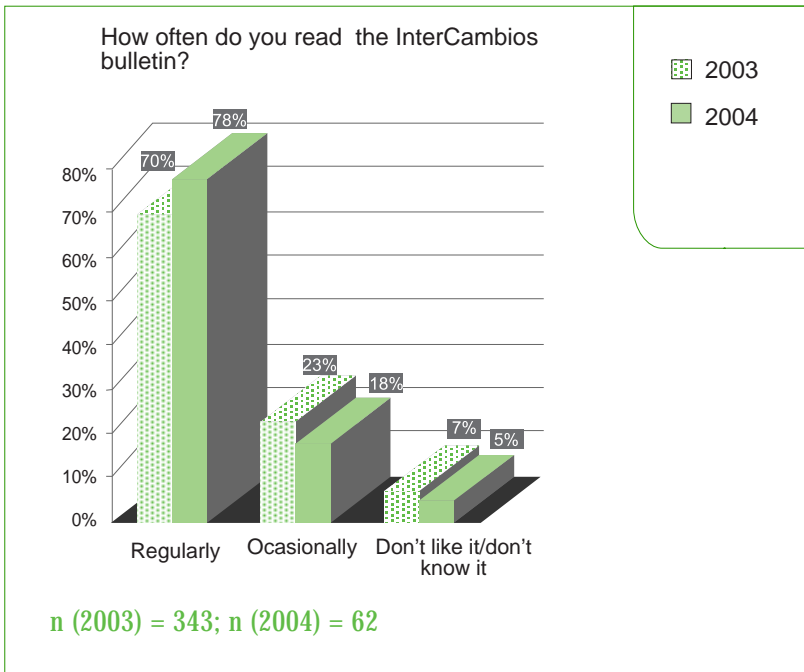


Figure 5. Classification of *InterCambios* bulletin readership habits.

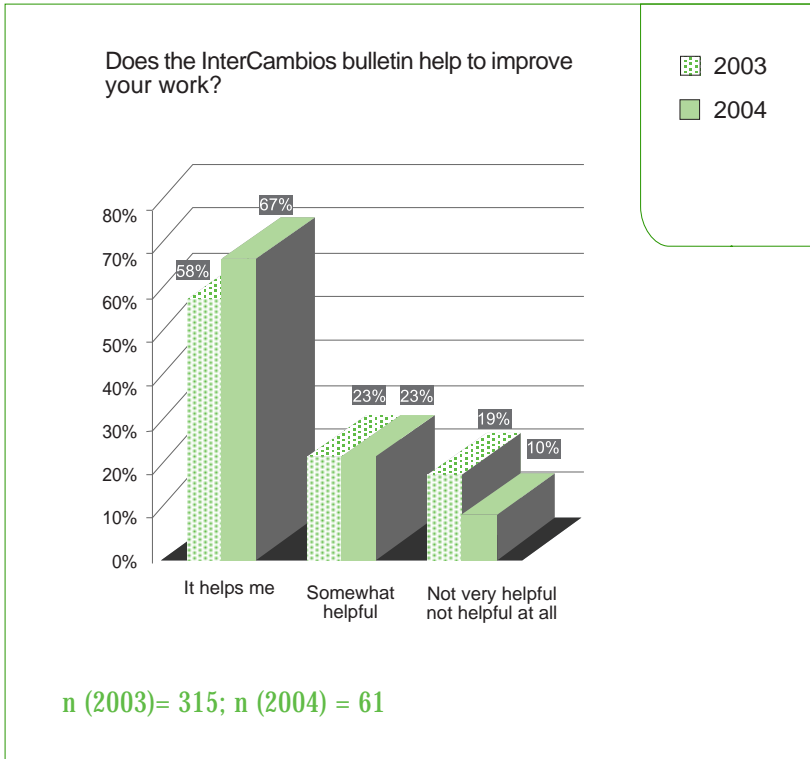


Figure 6. Usefulness of the *InterCambios* bulletin.

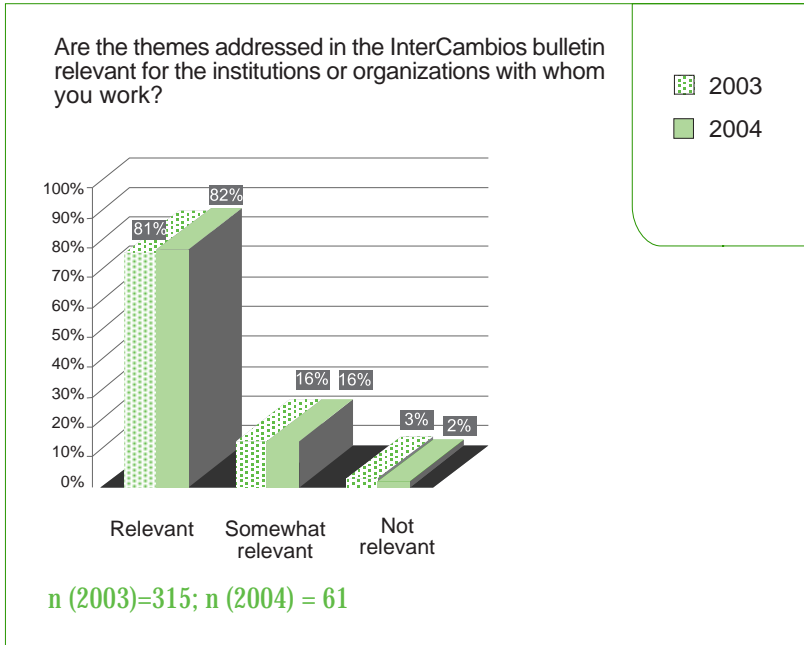


Figure 7. Relevance of *InterCambios* bulletin themes.

The CG website also shows a constant increase over time in the number of users who frequently visit the website. As is illustrated in Figure 10, there are over 800,000 annual hits on the site, with a considerable increase in 2003 that reached over 900,000 hits. Three quarters of the users consider the content to be relevant to their institutions and half believe that the content helps them improve job performance. This explains the 15-fold increase in the number of documents obtained from the CG website between 2001 and 2005 – a jump from 2,000 to 32,000 documents successfully requested per year.

Almost all participants who evaluate the website rate its contents as either ‘good’ or ‘excellent’. Over 60% of those who evaluate the content quality compare it to the websites of rural development networks.

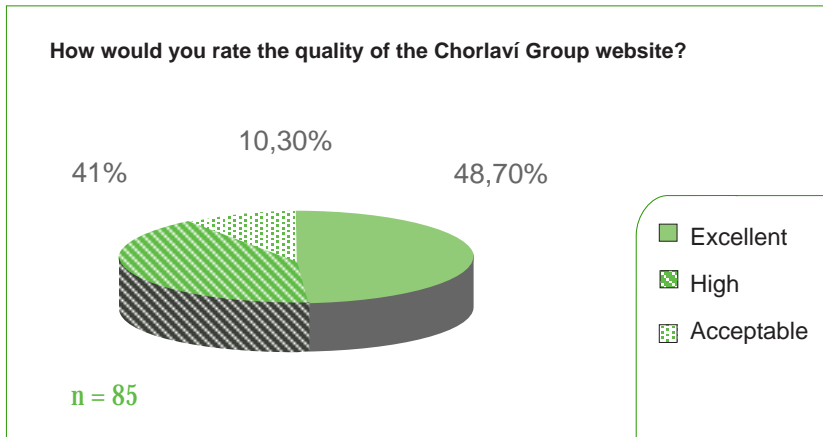


Figure 8. Quality of the Chorlavi Group website.

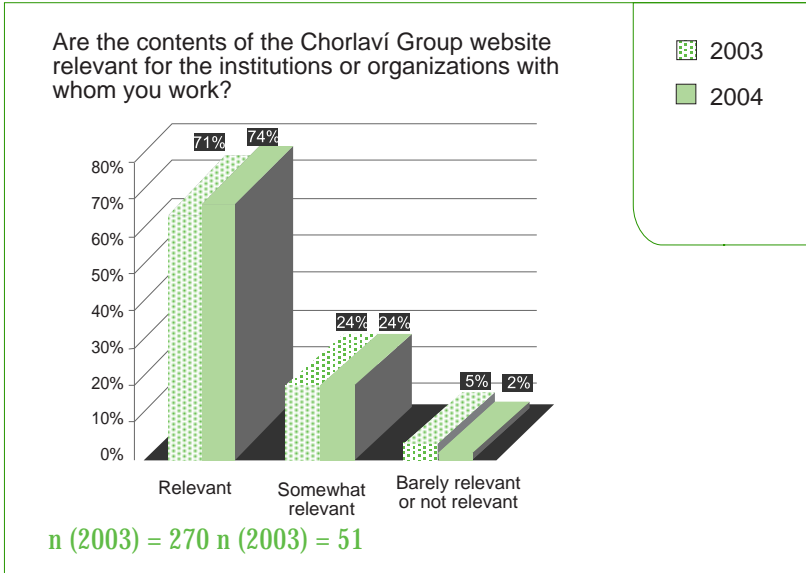


Figure 9. Relevance of information on the Chorlaví Group website.

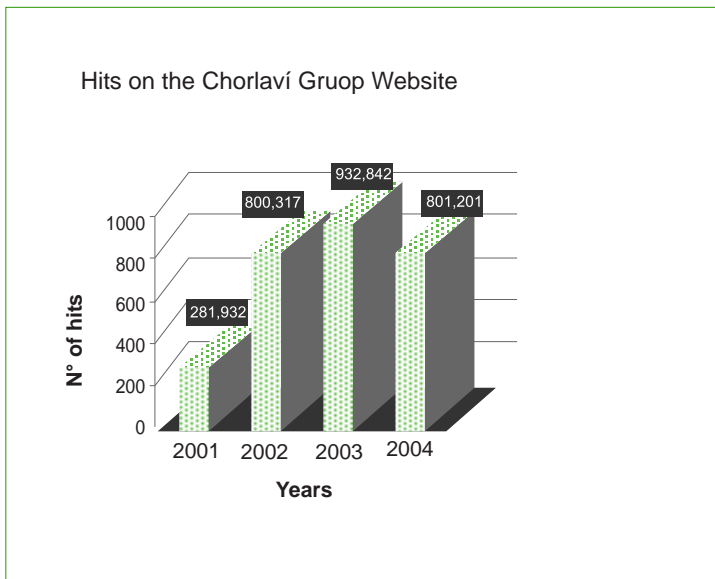


Figure 10. Annual hits on the Chorlaví Group website.

## 4.5 Capacity-Building via Distance Learning Courses

Once the learning cycle entitled, “Collective action and improvement in the living conditions of rural households” was completed in 2002, the FAO and FODEPAL signed a cooperation agreement to edit CG materials on that topic in order to develop a distance training course for professionals working in rural development in Latin America.

This course has been held twice with more than 40 students from over 12 countries in the region. The materials used are based on the development experiences of rural communities and have had very positive evaluations, which resulted in a new agreement signed with the FAO-FODEPAL for 2006.

Interestingly, a large proportion of students appreciated being able to apply the theoretical concepts of collective action to the real life situations supported by the CG. This combination of theory and practice has resulted in high levels of discussion and information use, as well as the lessons drawn from CG work.

## 5. Leadership and Management of the Chorlaví Group

### 5.1 The Chorlaví Group's Governance

At different stages, governance within the CG has changed and improved. In the CG's start-up phase, a Technical Committee composed of five experts was in place with the broad mandate covering everything from planning to evaluation of projects submitted for the Fund's competition. Committee discussions were entirely virtual (via email), with some use of telephone conferencing. The Council members participated on an individual and voluntary basis, which is still the case today.

During the CG's start-up phase, two forms of management can be distinguished. One was the Research Program Technical Committee supported by IDRC and the other was the CG Council, composed of seven people recognized as leaders on rural development issues in the region. This Council directed and made decisions related to the Chorlavi Fund. The discussions and deliberations in both governing bodies were carried out via electronic means.

During the CG's first three years, two structures were considered for the Group's management: an Advisory Council for the CG of no more than eight voluntary members who were responsible for advising ALOP, ICCO, and Rimisp in the Group's planning and strategic decisions; and an independent Executive Committee for managing the FMC. The Executive Committee merged the two separate committees for the IDRC-supported Research Program and for the Chorlavi Fund supported by ICCO and ALOP. Both executive bodies operate via electronic means.

The evaluations of the CG indicate three elements that hampered CG management at this stage. The first problem was the very unequal participation amongst advisors, with some barely participating in CG activities. The second problem was the complexity of the mechanisms linking the CG Council and the FMC Committee; for example, the CG Council should have contributed ideas to the FMC Committee for selecting themes for the contests, but decisions were instead made within the FMC Committee. A third weakness was deliberation via electronic methods, which although very inexpensive, was not conducive to a suitable level of discussion and integration of the members managing the CG, who, in many instances, did not even know one another personally.



An aspect that merits emphasis is the active participation of donors in the platform's governance. This involvement not only demonstrates a certain level of solidarity throughout the project phases, but also an openness to learn about the progress of the experience. This was invaluable in establishing the CG's very active dynamic and facilitating the successful introduction of modifications and adaptations throughout the project.

In the second three years, lessons learned are being applied in the complete integration of the CG and FMC decision-making structures into one Council of 10 people for the CG. This Council, now meets once a year to make strategic and planning decisions for the Group and communicates electronically throughout the year, especially regarding the selection of themes for the social learning projects and the selection of FMC awardees. In addition, a formal rotation requirement for Council members was established during this phase, dictating that at least 25% of members should change every two years.

## 5.2 The Chorlaví Group Executive Secretariat

The CG Executive Secretariat has also evolved over time. In the formation and start-up stages of the CG, a permanent Executive Secretariat was not considered since Rimisp, as the organization responsible for executing projects, assigned its researchers to specific tasks identified by the CG's governing bodies.

Over the first three years, the role of the coordinator was more apparent. However, there was no pre-established term in place, but rather a set of tasks and responsibilities for development during the organizational learning project cycle.

For the second three years, the CG has a part-time coordinator and each learning project has a part-time Facilitator (for approximately two months per year). Rimisp researchers are also available to provide support when necessary, one of the matching contributions negotiated in relation to CG funding.

### 5.3 Monitoring and Assessment of the Chorlaví Group

The monitoring and assessment of CG activities, outcomes, and impacts formally began in the CG's first three year phase. Since 2001, the annual assessments carried out have had different methodological foci, though they have always revolved around interviews and surveys among samples of different types of stakeholders. Statistics on the use of communications tools are also considered. Overall, activities were initially assessed relative to the annual work plans.

Upon introducing the learning focus, the CG funded a study (Guijt et al, 2002) that defined a conceptual and methodological framework for monitoring and assessment within the context of learning networks based on intensive use of the Internet. In the new situation, monitoring and assessment practices – instead of work plans – are used to focus on the quality of the processes and the fulfillment of learning objectives. The document of Guijt resulted in reflection that contributed to what, three years later, became the idea of learning projects and catalysts for change.

This focus on monitoring and assessment has provided good information on the quality of processes, tools, and products. These results have helped identify changes needed in the methods, foci, and tools, as well as FMC guidelines. In other words, the available assessment and monitoring system has been extremely useful in improving CG management.

Since the beginning in the second three year period, monitoring and assessment have had the following aims: (a) to monitor and evaluate the quality and effectiveness of the social learning process; (b) to measure the progress foreseen in the project and accurately identify this progress in relation to the categories of different catalysts for change involved; (c) to strengthen the process and expected products following the systematization of the CG's experience as a networking system and (d) to apply feedback to the CG's coordination and Council to make the necessary adjustments, applying adaptive management practices.

In order to fulfill this commitment, it was decided that Rimisp must establish an assessment plan that combines the foci of past years while simultaneously adapting the methodology for measuring progress, primarily through in-depth interviews from a sample of catalysts for change. Each year different categories will be selected until all of the categories foreseen are complete.

## 5.4 The Chorlaví Group's Costs and Human Resources

The cost of the program over four years (2001-2004) amounted to US\$800,000. Of this, a little less than 10% was spent on management and administration expenditures, leaving 85.5% to fund and support CG activities. Table 2 illustrates the cost breakdown as a share of the total versus total income.

Table 2. Expenditures of the Chorlaví Group during the First Three Years

| Total Income (in US\$)  | 813.093,00 | 100.0% |
|---|------------|--------|
| Mink'a de Chorlaví Fund   | 593.048    | 72,9%  |
| Activities (in-person meetings of FMC awardees communications strategies, e-conferences, the <i>InterCambios</i> bulletin, website) | 118.604    | 14,6%  |
| Executive Secretariat (part-time coordinator and other expenses)  | 62.900     | 7,7%   |
| Monitoring and assessment   | 25.000     | 3,1%   |
| Indirect Costs  | 13.541     | 1,7%   |
|   | 813.093    | 100,0% |

## 6. Outcomes and Impacts

This systematization included in-depth analysis of the learning processes through sampling a portion of FMC awardees.

For these studies, countries were selected on two levels: (I) Bolivia, Chile, and Nicaragua, which entailed visits and in-depth interviews with the technical teams and other stakeholders in each project's process and (ii) Argentina, Honduras, and Peru, with a lesser-scale analysis, focusing on the stakeholders who facilitated the systematization. In the projects from Peru, community representatives participated; in Argentina and Honduras, only the project was evaluated.

A total of 14 winning projects were analyzed and classified as follows: (a) one project (Argentina) corresponds to the project supported by IDRC before the creation of the Chorlaví Group and therefore constitutes a base line (1999); (b) four projects are from the competition on "Collective action and improvements in the living conditions of rural households" (2001); (c) four projects are from the contest on "Rural territorial development" (2002) and (d) five projects are from the contest on "Decentralized environmental governance" (2003).

For these case studies, the following research question was posed: Are the strategies and processes developed by the CG and FMC suitable for organizational learning? The analysis focused on different stakeholder perceptions of the quality of the process and products, as well as the identification of results and effects of each of the experiences analyzed.

In-depth interviews were conducted with thirty people who coordinated and executed winning projects (institutional workers and consultants). Over 53 people from the communities, social organizations, and other groups that participated in or were linked to the projects in some way, such as municipalities or social organization networks, were interviewed and, in some cases, participated in workshops. The results of this process are presented in the following chapters.

## 6.1 The Mink'a de Chorlaví Fund as a Social Learning Process <sup>2</sup>

Analysis of the learning process driven by the FMC reveals a set of elements that have been organized into the following categories: (a) Mechanisms and tools; (b) Participation; (c) Dynamic social learning cycle and (d) Impacts: what is all this good for?

### 6.1.1 Mechanisms and Tools

The case studies show a high level of unanimous response regarding the quality of the main mechanisms and tools used by the Fund, described as follows:

*Accessing information on how to apply to the competition.* Most of the institutions found out about the competition via the networks to which they belong and the Internet. The Fund's competition is widely known and publicized through NGOs, cooperation agencies, research centers, some universities, and development programs. It seems to be less known amongst public institutions – mostly regulatory agencies and municipalities – and ROs, although some of the group coordinators are already accessing the electronic networks and connections and therefore do know about the CG.

*Competition mechanism.* This mechanism is recognized as being very suitable and transparent for the presentation and selection of cases for systematization. *“The invitation to apply and procedures are well established, the terms of reference are explicit and meticulous, the requirements sufficiently simple, the time frames reasonable.”* This opinion was not only expressed by the winning institutions but also by those that were not selected and by RO coordinators who are familiar with the CG. Some of the latter group state that *“the competition is a good tool for fostering participation, channeling funds, and developing more democratic knowledge.”* The act of “competing” is considered to be a stage in the learning cycle that, in many cases, requires the applicants to adjust their concepts and methods. An additional element is that there are few resources available for performing the systematizations and, consequently, it is considered acceptable to compete for these resources on a clear and publicized basis such as that provided by the Fund.

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<sup>2</sup> The quotations in this chapter are taken from interviews completed for the case studies of the Mink'a de Chorlaví Fund's awardee institutions.

*Motivations for participation in the systematization projects.* In general, two motivations are mentioned: (a) several of the institution's technicians and workers, occasionally in collaboration with other local groups, become involved right from the design phase of the proposal, which facilitates greater inter-institutional learning and (b) one or two people, sometimes consultants, are in charge of formulating and executing the project, tending to concentrate the learning and other benefits of the systematization.

*Initial meeting and definition of the common value-adding themes.* There is consensus regarding the fact that the initial meeting is a key activity. This meeting is useful to: (a) introduce concepts related to the competition's theme, with critical reflection on this experience; (b) identify the axes of the systematization oriented by common questions; (c) define shared work rules that emphasize methodological issues; (d) connect all awardees, establishing a basis for future sharing, and (e) clarify administrative and procedural aspects, including, for example, the expected format and length of the final report. "*It is valuable and important to make a specific effort to add value to the FMC competition themes. The initial meeting represented the compass for thematic development because it oriented the individual and team work when identifying collective actions that each team should carry out. Likewise, understanding of the theme was improved, facilitating comparison between cases and establishing development points that would not otherwise have been taken into account when formulating the proposal for each individual case.*"

*Mechanisms and support for the conclusion of the learning cycle.* In this area, several comments were made as to the need to continue with value-adding processes through a more connected, consistent, and sustained effort, directed toward adequately “closing” the learning cycle. The suggestions have focused on the following areas:

- A final meeting or second workshop with the following objectives: (a) share experiences “in-person and directly” and evaluate individual and collective results; (b) receive more feedback on behalf of Rimisp and other colleagues regarding the quality of the final product and its contribution to the central theme; (c) teach more dynamic ways of presenting the product using visual aids and (d) discuss ways of disseminating the results, differentiating products by type of audience.
- Refocusing the final e-conference. Opinions, in broad terms, have been critical and showed that participation of awardees, particularly in the 2001-2002 competitions, has been poor. In general, concerns were expressed regarding this tool as the central activity for closing the learning cycle. The main observations were as follows: (a) a permanent connection implies a lot of time and dedication; (b) electronic contact is colder and more distant than face-to-face contact; (c) because of the type of intervention, the sequencing and rhythm of interventions does not always create a fluid link with a clear connecting idea, (d) the rare custom of reading and commenting leads to passive participation, and (e) the contributions do not always reflect the richness of individual learning from each systematization nor do they contribute significantly to improving analysis.
- The broadening and diversification of final products. The final synthesis publication received several remarks, with emphasis on the following themes: (a) the fact that it is “difficult to recognize” Contributions: “*The work completed is excessively diluted in the synthesis... we try to find ourselves and cannot, there is not an explicit recognition of the experiences.*” For this reason, it was said that this type of document would not be suitable for local dissemination; (b) the generality of the aspects addressed and the abstraction of specific results makes them difficult to apply. It is stated that “*if the main uses of the institutional systematizations were defined beforehand like the general systematization, more accurate work would be possible, avoiding such a general synthesis and making more applied thematic contributions,*” and (c) the very limited number of copies currently being distributed.

Apart from participant opinions, three other critical aspects have emerged from the analysis:

- The quality of the institutional reports. The authors tend not to be very critical regarding the quality of their products, which they consider to be good and suitable for distribution in a number of realms (international cooperation, national governments, other networks and NGOs, and, in some cases, in more academic environments). However, a review of these reports shows highly variable quality levels. In particular, the reports from the first years – 2001 and 2002 – lack structure, resulting in lengthy, poorly organized reports without useful executive summaries or substantial presentation of the results. Finally, the presentation of conclusions, recommendations, and lessons learned are not always clearly linked to the axes of the systematization.
- Doubts exist among other awardees of the same and other competitions, regarding the circulation of these reports, which are distributed via the CG website. Apparently, participants feel they are part of the learning process until they submit documents and, without participation in a final event, they tend to lose contact with other participants.
- The institutions lack clear dissemination policies and guidelines vis à vis the distribution of outcomes, most of all among the ROs involved. This is apparently left to the judgment of each institution. An argument in their defense is the lack of resources allocated to this final stage.

### 6.1.2 Participation

Participation in the systematization projects shows different trends and nuances that can be grouped as follows:

- An extreme and rare situation in which the idea of the systematization project and its development were of an essentially personal character, although backed by an institution. This therefore implied minimal involvement of other players despite being related to experiences linked to collective actions in defined territorial spaces.



- An intermediate situation in which the institutions conducting the systematizations recognize that the participation of other private, public, and RO organizations was circumstantial and limited to information collection methods. The reasons for this situation are different: (a) lack of experience and an interdisciplinary team when the executing institution or theme were considered of a more specific academic character; (b) wide territorial reach –for example, many projects in the same country – meaning that more direct stakeholder inclusion would have taken a great deal of time; (c) a finished project was systemized therefore it was difficult to mobilize stakeholders *ex-post*; (d) redirection towards a more institutional type of learning, to have impact on a cooperation agency or on public policies and regulations, and (e) the institution is not directly present in the region.
- In some of these projects, the poor participation of local stakeholders is recognized as hindering greater ownership of the results. In other projects, however, impacts have been strong like the application of the thematic recommendations for community forestry in the work plans of a sectorial regulatory agency or in the discussion of a forestry law.
- A situation with greater participation from stakeholders – mostly from ROs and local governments – who were actively sought out during the systematization process, continued previous participatory practices driven by the institutions or even created methods in order to achieve greater levels of participation. A key factor in these experiences is the trust established between institutions and organizations, often stemming from a previous more in-depth project.

### 6.1.3 Dynamic Organizational Learning Cycle

The Fund's awardees have different profiles, emphasizing among them the presence of national NGOs. The awardees' starting basis – their previous experiences with systematization – effects the added value of their participation, which can generally be categorized into three trends:

- A first group of institutions that had not performed systematizations or had done so in a “very specific, sporadic, limited, and superficial way,” in some cases mixing self-assessments and external evaluations. For this group, the value of participating in the Fund was remarkable right from the proposal preparation stage; they claim to have acquired a focus and method that, in most cases, is still applied today. In some institutions, it contributed to building an institutional line of work related to systematization as a learning process.

- A second group of institutions that had performed some systematization work prior to winning the contest. For this group, the Fund offered the opportunity to employ “*a more rigorous and scientific method that is more focused on a specific theme, overcoming the logic of the technicians’ field accounts or the memories from group workshops or goal-completion evaluations.*” An additional aspect highlighted is the acquisition of a methodology useful for analyzing processes critically and not only specific aspects at given moments. They also mention a new interdisciplinary approach in Universities. Sometimes, the introduction of a particular method is emphasized, for example, life stories, workshops with focus groups, and workshops for information validation and dissemination. In these cases, the systematization process is not always similar to that applied by the CG, but there are at least two types of learning: an ongoing analytical and strategic review of institutional tasks and the ability to combine diverse systematization approaches and methods based on circumstances.
- A third group of institutions that already included research and systematization in their main lines of work. For these institutions, the Fund’s contribution was more conceptual than methodological, such as approaching the concept of RTD or DEG, updating knowledge in certain fields such as natural resource management and sharing with recognized Rimisp researchers and intellectuals.

Stakeholders appreciated the methodology, which was based mainly on the use of participatory tools, the exploration of multiple visions, and critical analysis of the process. However, the participatory focus of the systematization was not recognized as a distinctive element, since most of the institutions reported already being familiar with community interaction and participation. That said, clearly this does not entirely concur with our conclusions concerning the effective involvement of local players in the systematization. There appears to be more of an institutional conviction or a trend to confuse participation in the systematization with the participation of beneficiaries in development projects.

There appears to be a relationship between ROs that were more actively involved in the systematization process and growing interest in the development of (their own) spaces for reflection and analysis – generally linked to their organization's perspectives and/or identified economic initiatives. In this way, the ROs build up their capacity to do reflection and analysis for future initiatives. That the ROs involved in the systematization recognize greater changes in the foci and methodologies within their own organizations than of the institutions that work with them is quite thought-provoking.

There is a general consensus amongst the ROs involved in the project concerning the higher quality of both the process and the product relative to those working with other institutional spaces doing comparable work (e.g. within NGO networks, some research and training centers, and, above all, development programs and projects).

Despite a somewhat unclear beginning, a network was established through the Fund that is recognized today and contributes to an organizational learning cycle where the systematization project is an important - but not the only - initiative. The following aspects of the organizational learning cycle are particularly appreciated: (a) moments in the cycle with opportunities for closer and more interactive contact, such as face-to-face meetings; (b) the combination of acquiring methodological tools with conceptual understanding on themes important for rural development; (c) the relationship between development operators, including researchers, intellectuals, and policy-makers and (d) the opportunity to transcend the micro-vision of projects developing a sense of involvement at the regional level.

Therefore, the thematic added value appears, in this more comprehensive learning cycle, to have had both a methodological and conceptual, multi-stakeholder, and territorial point of view. The answer to the initial systematization question is for the most part positive in that the strategies and processes developed by the CG and FMC are very appropriate for social learning. Recommendations for the future generally relate to two types of topics: (a) adjustments to mechanisms and tools to improve functioning and come to a more adequate completion of the exercise, and (b) greater discussion regarding the potential for broadening, deepening, and diversifying participation, although this may also lead to changes in the CG profile.

## 6.2 Impacts: What is all this good for?

Impacts that reach beyond specific and short-term outcomes are often difficult to identify in network analysis. The CG has found evidence of changes and learning processes that were influenced by participation in the network, specifically from implementing FMC projects. The evidence is summarized into the following categories:

- a) A small group of projects mainly related to personal issues, with little influence on institutions or ROs. These cases were mostly found in earlier competitions, which is a good indicator of the Fund's development.
- b) A second group in which the conceptual and/or methodological impacts tend to be in the implementing organization, partly due to an improved management approach. The assumption is that certain types of projects supported by the CG initially deal with institutional strengthening, which in turn may result in better outcomes and impacts at the local level. This is a widely shared argument among networks and NGOs that is not without legitimacy. However, the relationship between institutional strengthening and local development is indirect.
- c) A third group is that of projects with impact across several areas that endure over time and, in some cases, have increased their scope. The wide-ranging impact includes the design and implementation of specific field projects, local capacity building, and influence over regulations, policy-making, and public investment.

Given the breadth of the impacts observed, it is realistic to think that the systematization project is likely one of several factors influencing the assessment. However, it is important to stress that people involved in these experiences identify the FMC as a key catalyst, which clearly underlines the added value of the CG.

### Selected Learning Outcomes and their Current Uses

- One university research and extension center is deepening its approach to linking DTR and social learning, specifically "translating" it into two new institutional projects: 1) supporting the drafting of a municipal plan, and 2) delivering two annual undergraduate and graduate courses at a public university.
- One international cooperation agency has included systematization tasks as part of an institutional department for knowledge and learning management, with assigned responsibilities and considerable budgets.

- The same agency has strengthened its DTR institutional profile and practice in the intervention areas of three countries involving dozens of implementing agencies both NGOs and ROs and has improved capacity building through training courses delivered at a public university.
- The concepts of community forestry and Decentralized Environmental Governance (DEG) developed in one systematization project have been included in a public regulatory agency's work plans, in discussion regarding a new forest bill, and in a work plan funded by international donors in a Central American country.
- Several municipal governments have gained knowledge as to the application of analytical methods (e.g. perspective-linked vision, identification of strengths and weaknesses), which are elements that they consider useful for the preparation of municipal environmental management plans.
- Several NGOs have deepened their knowledge of natural resource management, land conservation, agro-forestry, livestock management, desertification, natural reserve management, and payment for environmental services. This knowledge is being used in the design and implementation of plans and projects in several countries.
- Several NGOs have gradually focused their projects on specific target groups such as women and youth, with positive outcomes in terms of improving their voice and decision-making power at household and local levels (e.g. local council meetings, community assemblies, local government) with some discernable changes in established power relationships.
- ROs from several countries have improved their participation and have developed their own spaces for debate and analysis not exclusively linked to a project or institution; they also show their willingness to continue capacity-building and participate or promote new systematization processes.
- NGOs, ROs, and local governments from two areas where mining companies are present have identified and begun using specific local conflict management tools.

Further examination of the impact analysis identified signals as to the scope of application for the thematic conclusions and recommendations of the systematization. By confirming that neither the overall final synthesis nor the institutional reports provided clear information about such application, we decided to identify the main changes observed from the systematization's final year until present as perceived by stakeholders in order to verify (in-)consistencies with thematic recommendations.

The intent is not for small projects such as those funded by the FMC to be responsible for such processes. Nonetheless, in some cases we did find a certain consistency between the recommendations of the systematization and the practices being developed. Questions that remain unanswered are the extent to which the considerable support provided by the CG promotes such validated practices and the extent to which the FMC is contributing to progressive learning linked to more innovative experiences that are pushing the boundaries of knowledge and options. The latter is apparently still in early stages of development.

#### Application of Thematic Conclusions and Recommendations: The Case of the Rural Territorial Development Competition

- *For production transformation.* suggested practices being implemented are related to land conservation: the cultivation of grains, grasses, and traditional crops on preserved/restored land; the increase in products linked to traditional or niche markets agro-ecological markets, for instance and the development of non-agricultural income raising initiatives.
- *For institutional development.* recommendations with higher compliance rates include: the establishment and consolidation of integrated farmers' organizations (aimed at income raising); the strengthening of local organizations and different interest groups, particularly for women and youth; the search for greater RO autonomy from institutions; accountability practices; improved relations with municipal governments; and municipal plan development.

## 6.3 The Chorlavi Group: Approaches to the Added Value of an Interactive Network

Throughout the systematization and assessment process, case studies focused on winning projects as opposed to a more comprehensive analysis of the CG as a network. That said, some interesting insights were also found at this level.

The basic assumption was that the CG is a network/platform aiming to add and link efforts and resources in Latin America, identifying potential strengths in terms of added or “hallmark” value in multiple inter-institutional scopes of action, for instance service delivery, the social learning process, proposal design, and institutional strengthening.

Considerable appreciation for the CG as an interactive network “of quality” was revealed. Compared to other networks and shared spaces, the added value of the CG can be characterized as:

*Flexibility.* Unlike rigid networks organized based on vertical models, the CG is recognized as an “open” network. There are no apparent differences between members and non-members that hinder participation. It is a platform that facilitates access to other networks and institutions. In this sense, the CG prioritizes the flow of contacts, information and knowledge, and “networking,” rather than the institutional structure and its maintenance.

*Executive management.* Although comments have been made about some of the mechanisms and tools used by the Fund, overall management is considered to be transparent and efficient, especially in relation to the competition. Coordination is completed via a minimal structure that is sufficient for the network to operate freely, channeling generally appreciated services, especially the website (considered to be versatile and dynamic) and bulletins.

*Focus on knowledge and learning.* Particularly noteworthy are the spaces for debates (mainly face-to-face), theoretical quality, updating, dissemination, and validation of relevant rural development concepts and themes – all features linked with Rimisp researchers – as well as different means of communication, including e-conferences, which are largely appreciated by “extended” users.

Notably, the different audiences make different suggestions, but all start from the basic premise that the CG is a platform with abilities, perspective, and quality. This finding could be interpreted as recognition that the CG has found a useful space to support those who – at different levels – work towards better policies, programs, and projects to combat rural poverty.

## 7. Conclusions and Recommendations

The reader will have found some conclusions and specific recommendations in the preceding sections. However, this section is devoted to conclusions and recommendations of greater overall relevance to the CG.

### Group Dynamics

- The CG shows great capacity for adaptation and innovation in terms of concepts, approaches, organization, methods, and tools, based on feedback from practical applications, assessments, and reflections focused on proactive and quick adjustments. The CG is considered to have been a great learning program for donors, the Management Council, and Rimisp. This fact is recognized by qualified informants and the high number of users interviewed.
- The CG working method is recommended as a permanent practice. However, after the previous development stages, greater “stability” would be preferable in terms of allowing sufficient application time for new strategies and mechanisms, as well as facilitating comparative assessment of the innovation outcomes regarding impact on the elements needing improvement.

### Learning Practices

- As a social learning platform, the CG demonstrates several positive aspects: a) selection of innovative themes in the current rural development setting; b) the systematization of field experiences; c) participation of different stakeholders; d) some level of influence on institutions and ROs that directly or indirectly participate in process analysis; and e) contribution to broader knowledge in defined themes. Learning is strengthened by the decision to receive good quality information through the e-bulletin or to participate in e-conferences. Clearly, these activities and tools can be improved, but it must be kept in mind that they are continually adapted based on their usefulness.
- Additional efforts are needed to determine the key aspects of the learning process and learning outputs. Questions still exist about the ability to influence all development stakeholders by means of networks based on ICT applications that require more specific analyses. This should not hinder the CG from focusing its efforts on activities producing lessons that have inspired the project’s main goal.



## The FMC

- Undoubtedly, the FMC is the most powerful of the CG tools. This is reflected in the considerable efforts and resources allocated to it, the good reputation of the Fund amongst people linked to the CG, substantial participation in the competition, and the impact of its outcomes on other CG activities.
- The systematization of experiences is the main source of CG learning material. This tool is highly valued with several institutional and community/RO impacts associated with being a competition awardee and having systematized field experiences. There are strengths and weaknesses in the systematization process and its outcomes, but, overall, it is a tool that develops knowledge and facilitates learning on several levels and within the CG's diverse audiences.

As mentioned in the previous sections, the FMC and the case studies have produced several specific findings and recommendations, they include the following:

- The FMC could increase the participation of institutions such as ROs and other initiatives in Central America by taking more direct actions, including: specific reference to ROs and institutions in the competition invitation, which may include bonus points for proposals from these groups; b) involvement of catalysts for change to support these target organizations – via their own networks – to submit proposals to the Fund; c) alliance-building between ROs and applied research centers to create consortiums that can participate in the Fund; and d) simplifying the terms of the invitations and rules to make them more universal.
- It is preferable that the stakeholders themselves systematize experiences given that they are the most familiar with the processes under discussion. To this end, we suggest that institutions applying to the Fund: a) ensure community participation from the early stages of proposal design, and attach related written evidence; b) provide written community commitment to the systematization of the experience and, preferably, to the rest of the learning cycle; and c) commitment from the institution applying to the Fund to provide feedback to the communities with whom the systematization process is being undertaken.

- The users of the communications tools have a good impression of the activities that add value to the knowledge developed by the systematization process, however the teams that carry out such tasks do not share this perception. We recommend: a) the establishment of a contractual participation commitment with the competition awardees for all the learning cycle activities; b) monitoring awardee participation in e-conferences, including their quality; c) to include participation in e-conferences as one of the criteria for participation in other activities, such as the learning tours or the final project meeting; and d) monitoring of the quality of the final synthesis and inclusion of the best systematization final reports in this document.
- The final outputs of the systematization and of the publication linked to each learning cycle must be undergo a process of quality control. This requires: a) clear and timely guidelines for drafting the final report, including assistance from each learning project's facilitator; b) external revision of final reports and deliverables for publication; c) retention of a significant portion of final payment for release once quality requirements for the final deliverables have been met; and d) additional efforts to adequately reflect the conclusions and lessons learned throughout the entire process, which will serve to minimize generalizations in the final synthesis. The latter suggestion could be supplemented with the inclusion of the best final reports in the synthesis.

### Diverse Audiences

- Users positively assess the quality of CG communications tools and FMC activity outputs. Given the CG's diverse audiences – i.e. target population– a variety of products are needed, regardless of common themes.
- The roles and participation of new audiences (for example, catalysts for change) must be monitored so as to ensure that CG tools are consistent with the characteristics of the new target group.
- An additional recommendation is to pursue alliances with other networks and/or organizations that work on similar themes in order to share valuable experiences, both in terms of knowledge and learning promotion.

## Assessment System

The assessment of the CG began with an analytical approach focused primarily on annual work plans. During this second three-year period, there was gradual transition towards scope mapping combined with an assessment of learning goals. This effort will be supplemented with in-depth case studies to continue identifying and deepening analysis of the network's field impacts. This stage should include graduate students.

## Cost-Efficiency

The CG is highly cost-efficient, with more than 80% of costs being transferred to FMC user activities and less than 10% to overhead and project administration costs.

## 8. Lessons Learned

A flexible work scheme and a dynamic and effective learning model are marked benefits for projects that operate in networks with virtual users and audiences who are initially difficult to identify. For such conditions to work, an effective interplay is needed amongst donors, government agencies, and the implementing institution. This interplay demands profound and ongoing analysis of outcomes, based on broad consultation and dynamic assessment mechanisms.

The fulfillment of learning goals in an open and virtual scheme appears to correspond to multiple factors: (a) the ability to generate knowledge for related audiences and practitioners in the short term; (b) the ability to involve multiple stakeholders that add value to and generalize about the knowledge generated; (c) the use of critical and participatory analytical methods, which involve direct stakeholders in the field activities intended to develop knowledge; (d) the broad dissemination of interim and final outcomes; (e) a highly flexible governance and management system adaptable and responsive to different audiences; and (f) a permanent analysis and assessment process that permits efficient and timely adjustments.

A mechanism to systematize real experiences related to cutting-edge rural development issues would be a powerful tool for developing knowledge among applied research institutions, ROs, NGOs, and other organizations and would serve as a basis for social learning while at the same time contributing to the knowledge of themes and innovations that play an important role in Latin American rural development strategies. For such a mechanism to be effective, it needs to have clearly established, transparent, and well-managed guidelines, as well as sufficiently attractive and interesting proposals that ensure a high-quality competition.

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