Systematization Guide

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COOPERACIÓN
REPÚBLICA DE EL SALVADOR
REPÚBLICA FEDERAL DE ALEMANIA

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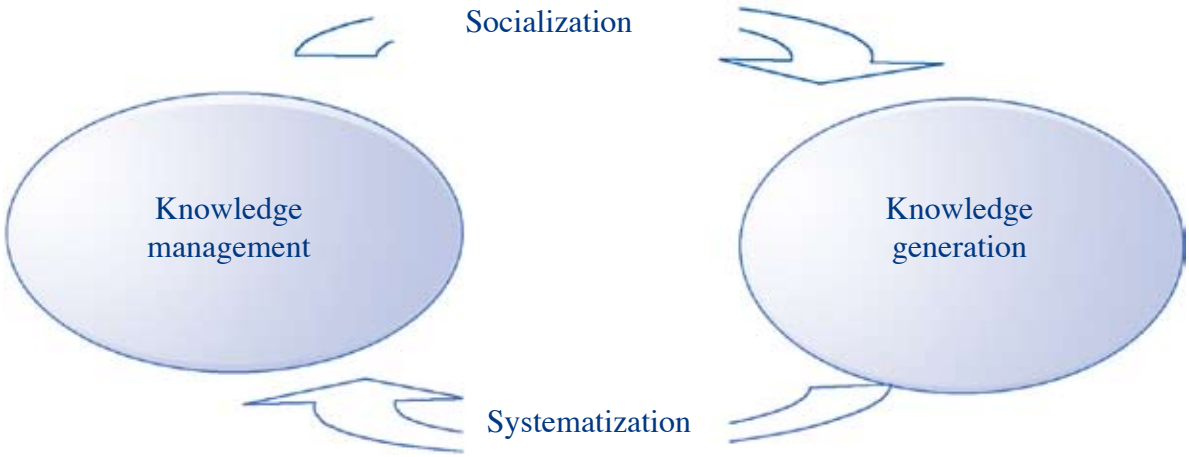
Introduction

It is recognized that knowledge is a key element for sustainable development processes in countries. In a context of globalization of the economy, where changes occur quickly, knowledge contributes to enable persons, companies, institutions and nations to prepare, use, produce and orient those changes in a successful manner.

The main focus of the German technical cooperation – GTZ – is centered on the generation of technical and practical knowledge for solutions adapted to local needs, which allow the people to transform their own present and future. Systematization is a knowledge-generating process. Understanding knowledge as everything that an actor (person or institution) uses to generate behaviors, attitudes and actions aimed towards an objective. As a matter of fact, we can consider that knowledge is everything a person owns and which helps him/her interpreting the environment and, as a consequence, to act.

The knowledge generated by persons, as individuals or parts of an organization (implicit knowledge) can be systematized to be shared with others (explicit knowledge). When this systematized knowledge is adequately managed, that is, it is found in a context where it can be transmitted and applied, a knowledge socialization process occurs, which at the same time allows for the generation of new knowledge, given that new knowledge is always based on prior knowledge.



Guide objective

The objective of this guide is facilitating the process of systematization of experiences of development programs and projects. It is aimed at government institutions, municipal offices, cooperating institutions, NGOs, community organizations and other actors interested in sharing their experiences with other technicians, institutions and beneficiaries.

Practical knowledge in the management and implementation of development programs and projects is required for an effective application of the guide, as well as a formation and experience in research projects. The guide proposes a series of methodological steps, criteria, instruments and formats for the carrying out of systematizations. It is not autodidactic; induction and accompaniment in the process by systematization experts is recommended.

This systematization guide is based on knowledge management instruments, and on the procedures for product documentation of GTZ, as well as on a first draft for process documentation, proposed by consultant Amanda Méndez. Besides, it incorporates elements of methodological guides, prepared by consultant Carmen de Pereira, which were applied by the institutions of the Network for the generation of youth employment to systematize their selected experiences, in the framework of their own measure "Social and economic integration of youths in Egypt, Vietnam and El Salvador", carried out by GET/ICON Institute. The methodology employed was developed by CEPAL and is used by ICAP in Costa Rica; it has as its foundation, the life cycle of projects. It was revised and validated by a technical advisory team of GTZ and independent consultants during the application of several experiences of programs and projects of GTZ in El Salvador.

Concepts

Systematization is a process of reconstruction and analytical reflection about an experience lived. It implies an investigation, analysis and documentation process.

Systematization serves to…

Present
- Learn from experiences
- Investigate about problems, solution measures and success factors
- Evaluate impacts
- Compare practice with theory
- Accumulate knowledge generated from and for practice

Future
- Transfer from experience and compare with others
- Analyze and adapt work methodologies
- Design future approaches and redesign projects
- Generate institutional memory
- Initiate and promote cooperation and work in networks

Systematization requisites

For systematizations to be carried out it is necessary, in the first place, that there is institutional commitment. From management to the persons carrying out the systematization, a change is required in the work style and in the priorities of day-to-day work as expression of their appropriation of the process.

By itself, the systematization process demands the same requirements as the execution of projects:

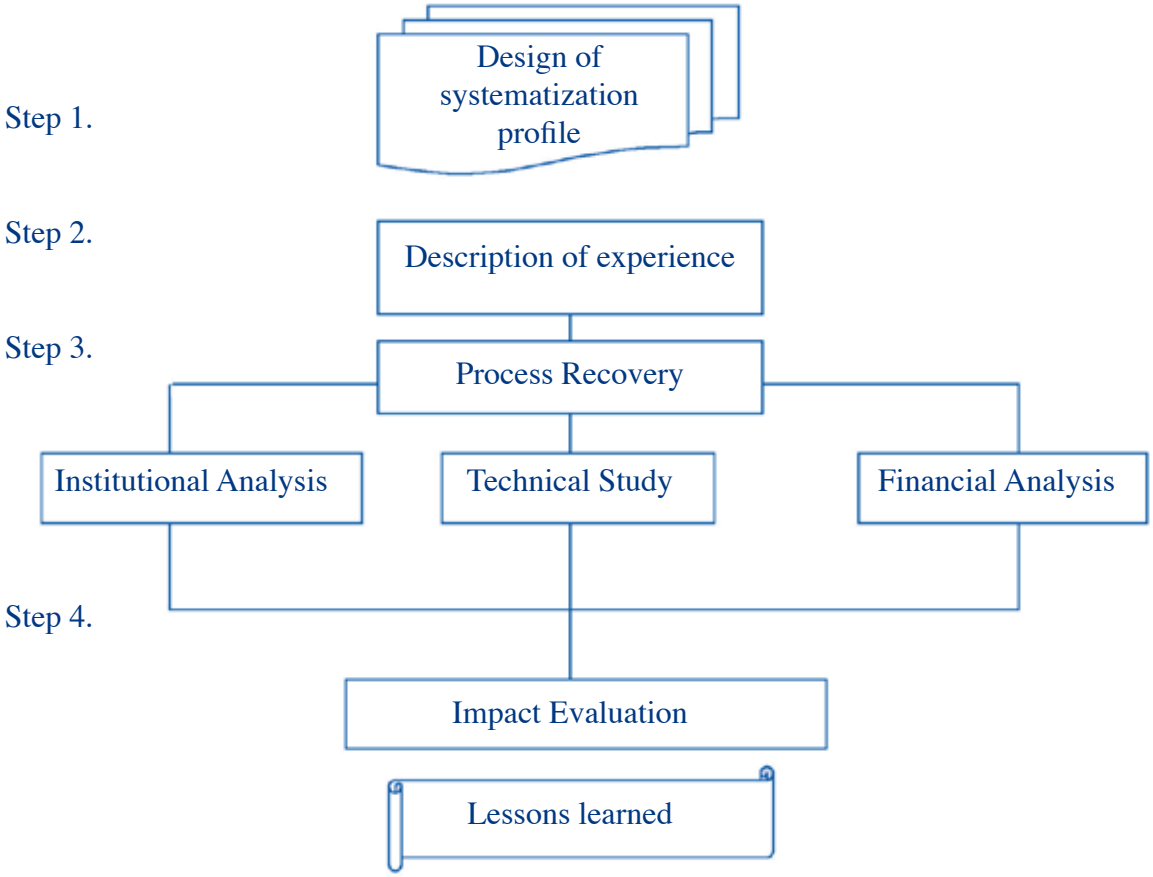
- Planning of systematization profile
- Resource allocation (human and financial)
- Application of methodologies and research instruments

For institutions and persons to strengthen from the process and generate learning, it is necessary to provide exchange spaces during the systematization and research process. In that manner, there is contribution to a group learning culture.

Systematization steps:

Before	0. Documentation during the experience (file)
	Step 1. Design of systematization profile
During	Step 2. Description of experience (record)
	Where and when it happened, which actors participated, which were the objectives, what were the results obtained
	Step 3. Recovery of the process (memory)
	Total visualization of what happened, not only of what was programmed, considering the points of view of the different process actors (team, counterparts, target group), define the experience
	Step 4. Analysis and reflection
	Evaluation of impacts, problems, solution measures, success factors (lessons learned)
After	Step 5. Publication and broadcasting

Systematization model



TIP! It is suggested that the information from the systematization record be emptied once systematization is concluded, not before (see attachment 6)

0. Documentation during the experience (file)

To be able to carry out an effective systematization, it is necessary that already during the experience, in each phase of the project cycle, a chronological documentation system be established and maintained to facilitate the later carrying out of the systematization.

TIP! It is suggested that an electronic and a physical file be kept per process or product, which allows to carry out the compilation of the documentation required for systematization.

The information which must be contained in the file is…

- ☐ Product description and work plans, as well as management flowchart
- ☐ Directory or list of persons participating in each phase of the process (names, institutions, with address and phone number)
- ☐ Conceptual and planning documents delivered at the beginning, implementation scheme
- ☐ Memory aids for work, coordination or planning meetings, with details of the main agreements and results obtained
- ☐ Documents for implementation, for example, procedure instructions and formation manuals
- ☐ Reports from planning, formation or evaluation workshops (list of participants, agenda, methodological plan, transcriptions, steps to be followed)
- ☐ Project publications or others relevant for process execution, for example, studies on the subject and similar experiences
- ☐ Impact indicators[1] : from the baseline up to the documentation of the results of periodic measurement, for example, collected in summary tables, system description and monitoring plans, measuring instruments, for example, questionnaires, impact chain
- ☐ Photographic and audiovisual memory (in an electronic photo database, several files can be opened, according to process or subject)
- ☐ Materials for promotion and information, for example, brochures
- ☐ Press articles, interviews with beneficiaries of the process, or in radio and television

This list serves as inventory of the documentation system

1 For more information, see 4.1 Impact evaluation

In case that systematic documentation is unavailable, or that filed information must be revised, it is advisable that the following generating questions be made:

- What information about my work do I count on? (existing information)
- Where is that information located? (location)
- What do I consider as the minimum information needed to plan my work? (standard)
- What information am I missing? (needs)
- How will I obtain the missing information? (strategy)

1. Design of systematization profile

To design the systematization profile, the following questions must be considered:

I. Why should that experience be systematized?
What knowledge will be obtained, what product will be achieved, whom will it be useful to, what value does it have that justifies the systematization effort?

II. What will be systematized?
A project as a whole, a stage of it, the treatment of a certain subject, the inter-relation generated with a specific group, etc.

III. How will systematization be carried out?
Define the research method: research tools or techniques and strategies that will be used to obtain the relevant information.

TIP! It is suggested that the "systematization profile" be formulated in a document answering the previous questions to establish the dimension and to define the experience which would be systematized.

The greater the dimension of the experience which would be systematized, the greater the dimension of the analysis. The adequate option depends on the objectives which we plan to obtain with the systematization: If it is desired that the experience as a whole be considered, we will consciously assume that the analysis will not be too deep. If we choose a certain dimension of the experience, we must assume that we cannot give an account of the whole experience.

Scheme of the systematization profile

- Title: search for a name for the final systematization document which is relevant, original and attractive for the recipients of the research, indicating time and location of the systematized experience.
- Justification: explain briefly what the experience consisted of, and justify the importance of its systematization
- Objectives: indicate what is expected to be obtained, both in terms of products and of processes, learning, etc. and establish a hierarchy for the objectives.

- Methodology: present and lay the foundations of the research method; describe orderly and briefly the main tasks which will be carried out, and in which manner this will occur; define responsibilities, etc.

- Resources: prepare an estimate of the time, materials and financial resources that will be required.

- Work plan: establish the adequate time periods for each step of the systematization, establish the basic sequence of tasks to be carried out and the key moments where the participation of others will be required, define intermediate products.

TIP! Title, justification and objective of the profile will serve for the introduction of the final systematization document at the same time (See Document structure in attachment 1)

TIP! Methodology, resources and work plan of the systematization profile will serve to describe the methodology applied, as final chapter of the final systematization document at the same time (see Document structure in attachment 1).

2. Description of the experience

The description of the experience itself consists of: a) the description of the project or program, b) description of the product to be systematized, and c) description of the implementation process according to phases defined. The necessary descriptions will depend on the systematization profile: If it is wished that a project with all its products be systematized, or if it is only a final product or an implementation phase of a product.

To describe when and where the experience was carried out, the actors which participated, the desired objectives and impacts, the basis are the initial documents of a process, such as the project or product description, work plans, conceptual documents prepared, and transversal impact areas of the project.

What is a product?

A product…
- is a set of activities to reach a target ;
- it has a beginning and an end
- requires of inputs, and
- generates added value

a) Project description
A project is a set of interventions seeking a positive change in the situation of the target group. The description of a project usually contains the objectives, indicators, target group, institutions involved, work plan, etc. depending on the base documents of the project.

b) Product record
Each project consists of sub-processes, having concrete products as results. For example, the carrying out of a training course is a defined process. It has as its products, the training materials and the facilitators formed.

See Record of the product in attachment 2

c) Description of the implementation process

1. *Productive process:*
   Defining and designing the process to prepare the product or service of the project:
- *Briefly mention and describe the methodologies and instruments applied*
- *Select and describe the process and technology for the project*
- *Prepare the corresponding flowchart (graph defining the implementation process and the provision of services)*

2. *Project engineering[2] :*
   Specify and quantify the physical infrastructure work
   Specify and quantify equipment and machinery

3. *Administrative aspects:*
   Present the structure and operation of the project's equipment, for example, an organization chart.

TIP!!! It is proposed that a flowchart or graph which facilitates the reconstruction of the process as a whole and of its elements be prepared.

A description of the implementation process requires of the definition of its phases for a good documentation of it:

Definition of process phases
Consists of breaking the process down in the elements, steps or phases which form it, to be able to discover the internal logic and to understand the relationships that have been established between the different elements of the process. It is necessary to identify the milestones that indicate the changes, stages or phases of the project. Each one of these phases must be classified, explaining what its main traits are, and what distinguishes them from the prior one and from the next one. It is useful to assign it a name which highlights its characteristic.

See an example of definition of process phases in attachment 3

TIP!!! It is suggested that a table be kept according to the phases of the process, as a summary of the documentation collected, afterwards or continuously during the experience which is periodically updated.

2 The engineering of a project is only relevant for projects having elements of physical infrastructure or investments in machinery or equipment, for example, a reconstruction project after an earthquake. Otherwise, it is omitted.

Process documentation

Phase	Period Resources	Objectives Results	Activities carried out	Methodology Instruments	Participants
Name of phase according to process stages	Execution period, duration dates, time invested, cost of activities	What was expected to be obtained? What intermediate results were obtained at the end of each phase? i.e. strategic plan	What were the activities carried out?	What methodology and instruments were applied?	Type and no. of organizations (GOs, NGOs, private enterprise) Name of the institutions Target group: No., sex, age, municipalities

See example of process documentation in attachment 4

Since it is necessary to document what happened and the results obtained, and not only what was planned, other documents are required, such as memory aids, reports and lists of participants in a chronological and synthesized manner, which are summarized in this proposed table. Therefore, the vital importance of systematic documentation in physical and electronic files during the experience is reiterated (see step 0).

The description of the experience is understood as a preparation and organization of the information necessary to carry out the later recovery of the experience (see next step 3).

3. Recovery of the process (memory)

The recovery of the process of the experience lived consists of the total visualization of what happened, not only of what was programmed, considering the points of view of the different actors in the process (team, counterparts, target group). It is not enough to present the activities programmed by the project, nor the actions carried out by the project team, but everything that really happened, including what all persons or groups did, for which it is necessary to make a progressive reflection of the process: how, when, with whom, which resources were used. It is about explaining why something not programmed was included and something programmed was not carried out.

In contrast to the previous stage (description of the experience), the recovery of the process will need capacity of analysis from the participating actors, systematizator and those responsible for the project. In the previous stage, the method is descriptive, in this step, a greater level of reasoning and understanding is essential.

We reiterate that systematization is a process of reconstruction and analytic reflection about an experience lived, which implies a research and documentation process. This indicates its character of abstraction, not of description. A difference must be made between a synthesized compilation based on the information collected (description of the experience) and systematization, which consists of reasoning, comparing and measuring the practical knowledge acquired during the experience as well.

The recovery of the process, or the collective memory of the experience lived is the step of systematization which requires of a defined research methodology (see step 1, systematization profile). The tools usually applied are individual interviews (structured, semi-structures or open), focal groups and workshops for collective formulation of lessons learned.

3.1 Technical study

The technical study considers an introduction in conceptual bases, the approach and principles of the project or product, as well as the intervention strategy of the project or product. This is the reference frame against which the experience lived is compared.

Theoretical revision

One of the objectives of systematization is comparing practice with theory to generate learning from and for practice; therefore, it must be based on the theoretical concepts which served as a basis for the intervention. The systematization must consider a brief summary of the concepts, maybe even a graphic visualization.

Reconstruction of the impact hypothesis

Each project has an intervention strategy based on an impact hypothesis: A specific process is implemented to obtain expected results and impacts.

Example

Impact hypothesis: The high incidence of diarrhea in the community happens because of lack of access to drinking water and lack of health knowledge. With the intervention of the project, the cases of diarrhea will reduce.

Any intentional process, such as are development projects, is based on specific bets or impact hypotheses that the different actors attempt to achieve through their participation on it. It is necessary to rebuild these impact hypotheses and the changes that the intervention strategy has undergone. It is articulated on three dimensions:

1. the *problem* attempted to be solved
2. the *objectives* pursued (the situation wished to be achieved through the intervention)
3. the strategies which have been established to achieve the objectives

The contents of each one of these dimensions must be explained and conceptualized

Reconstruction of the full vision

The moment of technical analysis consists of the preparation of a set of questions, which go from ample and general to the most precise and directly articulated to reality. To consider the points of view of the different participants in the process, it is convenient to look for forms of questioning them for the reconstruction. Guides can be elaborated for in-depth interviews, or questionnaires for a compilation of individual points of view, or a workshop is carried out with all participants or different groups off actors with a participative methodology which visualizes results. This last method has the advantage of contributing to the generation of a joint vision of what happened. The questions must be formulated by phase of the project.

TIP!!! The formulation of the questions must derive from the objectives of the systematization and the dimensions of interest for the expected analysis and learning, according to the profile of the systematization.

The analysis concludes with the ordering of the information originating from the reconstruction of the process and finally providing an answer to the reconstruction of the impact hypothesis (theoretical foundation of the intervention). At times, it is necessary to complement the information with other sources.

3.2 Institutional analysis

The internal institutional analysis refers to the executing institution of the project. The external institutional analysis comprises the institutions involved in the implementation of the experience.

Internal institutional analysis

1. Carry out a brief investigation of the history of the institution, to better understand its origin and raison d'etre.
2. Find out, specially, the year it was created, the circumstances and reasons for the formulation of the program/project (program/project background).
3. Describe briefly, technical aspects of the program/project (counterpart, objective, execution period, components, expected results, volume, personnel).
4. Recover the reasons for the carrying out of the experience to be systematized, for example, feasibility studies, situation analysis, fast participative diagnoses.

A summary of this section can be a part of the introduction/background of the final systematization document.

External institutional analysis

1. Identify the institutional actors involved in the experience of systematizing those which provided more encouragement to the development of the experience, know why they got more involved, why some committed more than others, etc.
2. Describe briefly, its nature and institutional purposes.
3. Analyze the following variables of the actors involved:
   Capacity: Establish the political weight of the social actor in regard to the type of power that he/she handles: technical, administrative or financial. His/her management style is also important, to know the spaces for future negotiation.
   Interests and needs: Recognize the interest of each key social actor on the development of the selected experience. The needs of actors can be based on different satisfactors, such as: power, personal self-realization, affiliation, service improvement, among others.
   Alliances and conflicts: Evaluate the affinity or disparity that each actor has with other key social actors, to determine his capacity of mobilizing other social actors as a function of their interests.
4. Determine the strengths and weaknesses of institutions in relation to the experience lived.

Actors	Capacity	Interests and needs	Alliances and conflicts	Strengths and weaknesses

3.3 Financial analysis

Financial analysis must form part of any systematization. Its object is studying feasibility, from the standpoint of financial results. Therefore, the benefits and costs of the project are calculated in economic terms, at current market prices. Costs are understood as the amounts of economic and human resources, as well as contributions in kind, for example, location. It is important that the conclusions of financial analysis be set out, considering the type of experience being systematized; feasibility and sustainability must be analyzed.

Dimensioning the costs of the experience for future projects is fundamental. However, this type of information is usually hard to obtain. Many times, it is necessary to carry out a special survey, and to reconstruct and estimate the possible costs of each institution involved.

Financial analysis

Phase	Investments	Income/ costs	Financing sources	Contributions from institutions

See example of financial analysis in attachment 6.

4. Analysis and reflection

The results from the impact evaluation are taken up again in the final phase of the process, and the lessons learned are documented.

4.1 Impact evaluation

The following is required for impact evaluation: a) description of the impact monitoring system and b) of the monitoring plan, and specially c) the results of the impact measurement. Again, the data collection process is described, and not only as it was planned by the researcher. Recommendations to improve impact and its measurement are formulated as the basis for the planning of new projects.

TIP!!! It is suggested that tables are recorded in the systematization file, and that reports about the impacts obtained are prepared in a periodical manner.

a) Description of the monitoring system
The description of the impact monitoring system specifies the impact chain (impact hypothesis) and the measurement instruments.

b) Monitoring plan
The impact indicators, how and when they are measured, are defined in the monitoring plan.

Indicator	Data requirements	Measurement methods	Measurement time	Resources

c) Results of the impact measurement
To summarize the results of the impact measurement, it is suggested that summary tables of the values of each indicator obtained at different moments during the experience be prepared, and impacts are compared according to implementation phase as well.

Summary of values

Indicator	Initial value	1st. measurement value	2nd. measurement value	Comments
	…baseline			

Impact comparison

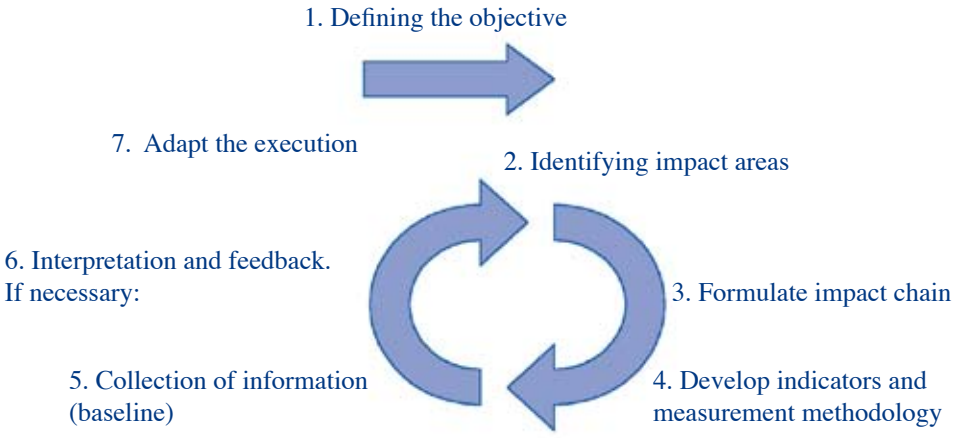
Phase	Expected impacts	Qualitative and quantitative Impacts obtained	Positive and negative unexpected results

What is impact monitoring?

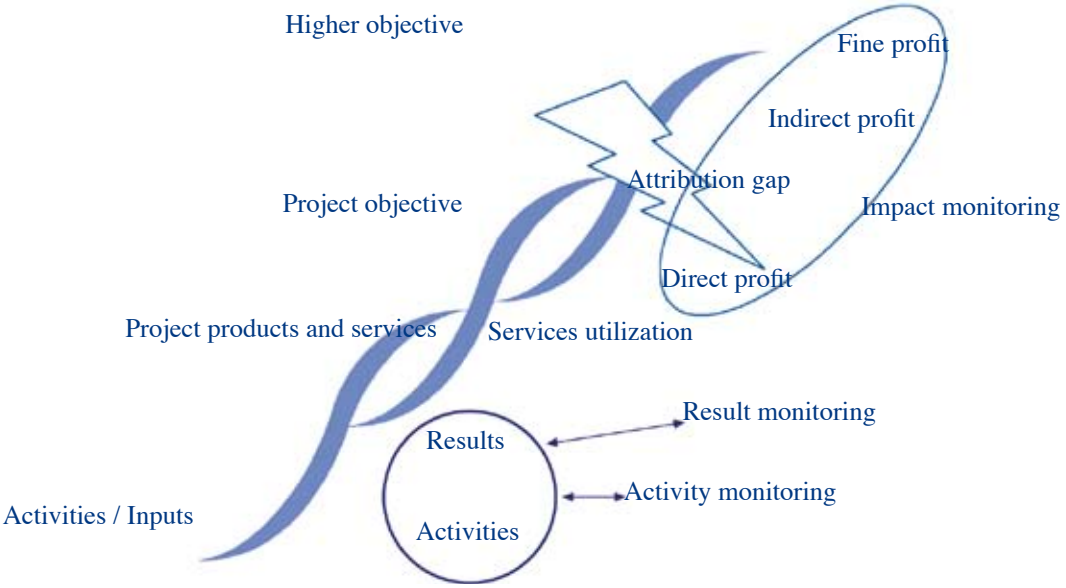
Impact monitoring measures the changes in the wellbeing of the target group which can be attributed to a project or policy.

- It facilitates learning within an organization
- It anticipates information to improve the efficiency of programs and policies
- It creates the bases to adapt the planning and execution of programs and projects

The steps to define an impact monitoring system are:



The impact chain summarizes the strategy of intervention and the impact hypothesis of a project. It is the basis for the formulation of indicators. Many projects are still centered on the monitoring of activities and results, and not in the evolution of impact (changes in the target group). The impact chain helps identify the direct usefulness of the target group at the reach of project interventions, for which impact indicators are formulated. It recognizes the attribution gap as a methodological problem. Highly aggregated impacts can hardly be attributed to the project (for example, poverty).



Impact reports must contain, besides the measurement data, information about the following areas:

- *Analysis areas*
  Cost-benefit (per beneficiary)
  Sustainability
  Degree of replicability

- *Transversal impact areas*
  Reduction of poverty
  Environmental impact
  Impact on gender
  Youth participation

1) Cost-benefit analysis

1. Links of the project to institutional policies
2. Links to sectoral policies where experience is attributed
3. Identification of economic and social costs and benefits:
   Qualitative valuation of direct and indirect socioeconomic merits of the project and of indirect costs: employment, income distribution, impact on facilities of infrastructure and others. The valuation is carried out for the implementation and execution phases.
4. Comparison of the situation with and without project
   Both scenarios must be considered:
   With project, what are the costs and benefits
   Without project, what benefits and costs would have been obtained

2) Sustainability and replicability analysis

Guide questions about *sustainability*:
What is the degree of durability of impacts in persons and institutions?
Do impacts persist at the end of the intervention without harming the environment?
Do the innovations generated in institutions and in culture remain?
Are the financing needs to continue applying the innovations generated covered?

Guide questions about *replicability*:
What is the degree of replicability?

- transferences to other regions possible without adaptations
- a pilot phase required to make the necessary adaptations
- parts which must be adapted to the context, the concept stays the same
- conceptual adaptations to the context

What is the cost of replicating the experience?
What minimum conditions are required by the replication of the experience?

3) Survey of transversal areas

Poverty	- Poverty situation in the region of intervention at the beginning of the experience - Focus on reduction of poverty: help for the own help at the micro level, social services at middle level, environment improvement at the macro level - Identification of the contribution to the reduction of poverty (relative and/or absolute)
Environ-ment	- Description of natural environment, with emphasis in the environment without the project - Environment with the experience - Identification of environmental impact with the execution of the experience - Measures of mitigation, costs and relationship to the cost of the project - Global impact evaluation of the experience in the environment
Gender and youths	- Description of the initial situation considering the participation of women and youths with development indicators according to gender and age at the beginning of the experience in the subject of interest, for example, employment - Participation of the target group, according to age and gender - Expected impacts, obtained and unexpected effects, according to age and gender

In case that a project does not count on a monitoring system, the expected impacts must be mentioned in the systematization, and there can be a rapprochement through the perception of those involved, if these have been achieved or not. The systematization is not an impact evaluation, nor does it substitute a monitoring system.

4.2 Lessons learned

To document the lessons learned, the difficulties and problems faced are analyzed, and how they have been overcome; successful situations and their causes are indicated; mistakes made are highlighted so that they can be avoided in the future. It is important to formulate suggestions and recommendations for the next phases or for future projects.

TIP!!! It is suggested that difficulties, success factors and mistakes made in each phase of the experience lived be analyzed, and to document this in a summary form.

Difficulties overcome

Phase	Difficulties present	How they were overcome (strategies and results)	Suggestions to prevent difficulties

Success situations

Phase	Successes acknowledged	Success factors (external and internal)	Recommendations for future phases/processes

Phase	Mistakes identified	Mistake causes	Recommendations for future phases/processes

Attachments

Attachment 1: Document structure

Index

0. Introduction / Background

1. Systematization methodology (systematization profile)

2. Description of the experience

3. Recovery of the process

   Technical study

   Institutional analysis

   Financial analysis

4. Analysis and reflection

   Impact evaluation

   Lessons learned

5. Conclusions

Glossary (when necessary)

Attachments

Bibliography

Attachment 2: Project description

Project Country / region of intervention	
Product name: Person responsible for product	

CATEGORY	DESCRIPTION
1. Brief description of product with quality elements What is it wanted to achieve/ prepare?	
2. User(s) / target group Who will use the product?	
3. (Immediate) impact due to use of product What change do we expect to achieve? (=impact hypothesis)	
4. Milestones of the production process What intermediate products are expected to be obtained?	
5. Responsible for product preparation/implementation. Who is in charge of coordinating the preparation / implementation?	
6. Participants With whom does the person responsible for the product prepare/ implement it?	

7. Estimated costs and contributions by source:	Human Resources	Financial Resources	In kind	Technology / knowledge

8. Execution period / term (date of product delivery)	

Attachment 3: Example of definition of phases of the project

Phases of formation of ISC

Intersectoral Commission for Integral Attention to Adolescents. District VI of Managua, Nicaragua.

Phases	1. Formation	2. Consolidation and extension		...	3. Autonomy
Organizational development	Cap study on sexual and reproductive health of adolescents of District VI	First annual plan Election of first coordinating team 11 meetings plan evaluation (53% - Mitch, stop) definition of vision, mission, objectives, etc.	Second annual plan Election of 2nd. coordinating team 11 meetings plan evaluation (70%) integration of adolescents	3rd. annual plan Election of 3rd. coordinating team 11 meetings plan evaluation (73%, activities outside of plan) organization of adolescents motto and poster		
Members State	7 add´l delegations 1 delegate from municipal office 5 NGOs	8 ad´l delegations 1 delegate from municipal office 5 NGOs	9 delegations 1 delegate from municipal office 7 NGOs 2 base groups	7 ad´l delegations 1 delegate from municipal office 8 NGOs, 2 base groups 1 adolescent commission		
Civil society Most successful activities	First tournament Adult training in CPMV	2nd. Tournament (26 teams) vision, mission workshop logo contest adolescent training in CPMV	3rd. tournament (32 teams) methodology workshop training of adolescents in CPMV	4th. Tournament (47 teams) adolesc. conference (2 days w. many events) presentation of poster in Mexico training of adolescents		

Chronology	1997	1998	1999	2000	...
Phases	1. Formation	2. Consolidation and extension		...	3. Autonomy
Difficulties	Create interest in cooperation, motivate and take advantage of motivation	Develop a common sense, rapprochement between state and NGOs	Rapprochement adults and adolescents, lack of own infrastructure	Less representatives of the state, partly due to creation of state commission against youth violence in District VI	
Adequate measures	• Find common motive for cooperation • Define a concrete purpose which identifies joint activities • Avoid external formation	• Create an identity • Conflict management • Definition of work principles • Provide place to meet and make friends	• Celebrate joint achievements • Create understanding between adults and youths • Find a work routine • Establish communications culture	• Encounter of both commissions to know about tasks and to exchange work experiences • More diffusion • Seek alliances	

Attachment 4: Process documentation

The following example for process documentation is about the preparation of formation materials.
The future phases, non-documented, of that process in execution are:

- Design and programming
- Revision and printing approval
- Launching
- Implementation
- Evaluation

Phase	Time / Resources	Activities	Results	Participating Institutions
Survey and systematization	June-August 2003 35 working days US$ 500 09 / 09 / 03 19 / 09 / 03	- Analysis of work orientation programs in Germany and Latin America - Preparation of ToR for the systematization of work orientation materials in the country - Preselection of students passing the consultancy course on the part of UES university - Carrying out of junior consultancy. Material collection, classification and evaluation - Global design of program (objectives, target groups, contents, involved, basic principles) - Presentation of systematization results and of program in its global design before technical liaisons of Young Country and - …before sectoral institutions	- Good examples identified - Work approach finished - Concept prepared, approved by consensus and presented - Work proposal prepared - Presentation in data show of program - Systematization document available in web page - Info-breakfast carried out - Formation of coordinating group at the national level of technical liaisons of Young Country	Executive director, Young Country Technical team, Young Country Teaching staff, UES Junior consultant, UES student Advisor, GTZ

Phase	Time / Resources	Activities	Results	Participating Institutions
Preparation of program modules	September 2003 – April 2004 25 working days US$ 600	-Approval of global design -Definition of minimum content - Joint preparation of ToR for preparation of materials - Hiring of independent consultants by modules - Definition and implementation of management module - Technical revision of the material of the materials prepared - Incorporation of comments - Obtaining of funds for printing	- 7 monthly follow-up meetings of coordinating group at the national level - Memory aids of all meetings	Executive Director, Young Country Technical liaisons of Young Country: MINED, INSAFORP, ISDEMU, MINEC, MTPS
No. 3 Entrepreneur Orientation	August – September 2003 10 working days US$ 1,000 27 / 08 / 03	- Preparation of methodological guide and support material - Methodological preparation of workshop - Preparation of evaluation questionnaires and observation guides - 1 trial workshop - Application of trial of questionnaire of personal entrepreneur characteristics	- Contents and times of methodological guide evaluated - Methodological guide, work notebook and support material prepared	8 young leaders from the region in workshop (3 men, 5 women, 14-19 years) 8 youths from municipality for questionnaires (3 men, 5 women, 16-19 years) Independent consultant 2 junior consultants Advisor, GTZ
No. 4 Occupational orientation	October 2003 10 working days US$ 1,500 21 / 10 / 03	- Preparation of methodological guide and support material - Methodological preparation of workshop - Preparation of evaluation questionnaires and observation guides - 1 trial workshop - Adaptation of material	- Report of trial workshop - Contents and times of methodological guide evaluated - Methodological guide, work notebook and support material prepared	15 students from C.E. San Francisco, Zacatecoluca (7 men, 8 women, 14-17 years) Independent consultant Teacher from C.E. Advisor, GTZ

Phase	Time / Resources	Activities	Results	Participating Institutions
No. 1 Vocational Orientation No. 2 Social-Work-related Competences No.0 Introduction	December 2003 – February 2004 30 working days US$ 4,500 04 and 11/02/04	-Preparation of methodological guide and support material -Methodological preparation of workshop -Preparation of evaluation questionnaires and observation guides -2 one-day trial workshops -Adaptation of material	-Reports of trial workshop -Contents and times of methodological guide evaluated -Methodological guide, work notebook and support material prepared	12 students from INJOSICA, Zacatecoluca (first workshop: 6 men, 6 women, 16-22 years) (second workshop: 7 men, 5 women, 16-18 years) Psychologist, INJOSICA Technical liaison, Young Country, MINED Technician, Young Country Advisor, GTZ
Validation of materials	March 2004 4 working days US$ 500 25/03 and 01/04/04	-Methodological preparation meeting -Preparation of methodological plan and validation guide -2 one-day workshops -Preparation and delivery of memory aid of validation workshops	-Memory aid of validation workshops -Inputs to improve writing and formulation of materials -Identification of preparation needs of facilitators	12 students from UPES (3 men and 9 women, 20-26 years) 3 regional youth leaders (1 women, 2 men, 20-24 years) 2 junior consultants Technician, Young Country Technical liaison of young Country, MINED Advisor, GTZ

Attachment 5: Example of Financial Analysis

This financial analysis was prepared for two pilot measures in the entrepreneurship process for the creation of new companies in the La Paz region. The first one carried out was Zacatecoluca in 2004 and 2005. The second one was a transference of the methodology to the municipality of Olocuilta in 2005.

Financial contributions in Olocuilta		Financial contributions in Zacatecoluca	
Actor	Contributions	Actor	Contributions
Olocuilta municipal office	Facilities and transportation US$ 775	Zacatecoluca municipal office	Notification, follow-up to the target group; snacks and location US$ 800
ISDEMU	Legal advice US$ 1,000	FEDISAL / RED	Workshop facilitation, preparation of methodological guide US$ 1,500
COMSIMAO	Notification and management US$ 300	MINTRAB, ITCA-FEPADE, MINED/ INJOSICA	Training for youths US$ 100
AMPES	Technical assistance for general coordination US$ 1,000	FADEPYME	Workshop facilitation, coordination / organization, preparation of methodological guide US$ 1,500
FOSOFAMILIA, Caja de Crédito de San Pedro Nonualco	Participation in financial services fair US$ 100	FOSOFAMILIA, FUSADE-PROPEMI, FADEMYPE	Participation in financial services fair US$ 150
National University of El Salvador – UES	Coordination of tutors for entrepreneurship in social hours US$ 500	GTZ	Methodological design of process, general coordination, food, stationery US$ 5,000
GTZ	Methodological transference US$ 3,000 Follow-up & technical assistance US$ 3,000 Travel expenses for entrepreneurship tutors, location, food and stationery US$ 600	Swisscontact	Preparation and adaptation of methodological guide, systematization US$ 6,000 Food US$ 300 Technical assistance and accompaniment US$ 1,000
TOTAL	US$ 10,375	TOTAL	US$ 16,350
Cost-Benefit	12 business plans with probable financing of 12 women US$ 864.58 per beneficiary	Cost-Benefit	3 initiatives with financing of 4 beneficiaries US$ 4,097.50 per beneficiary

Attachment 6: Systematization Record

1. General information of the institution

Country	
Sector	
Address Main contact (name of person, e-mail, web page)	
Type of organization (government, non-government, private, for profit or non-profit, base org.)	

2. General information about the experience

Name of program / project / initiative	
Subject matter	
Intervention areas (training, consultancies, etc.)	
Intervention level (national, regional, local)	
Intervention region (department, municipalities, rural and/ or urban)	
Target group (age range, sex, providence, others)	
Period and duration of program/ project	
Budget	
Financing Sources (from whom, how much, under which conditions)	

3. Technical information about the experience

Objectives	What are the general objective and the specific objectives?
Justification	What are the main problems of the target group that the experience aims to solve? What was the initial idea for carrying the project out?
Approaches and strategies	What approaches and strategies have been defined to solve the problems of the target group? What main activities are carried out? How is the experience carried out?
Methodologies and instruments	What methodology and instruments apply in which moments of the experience?
Innovation	How are they characterized?
Institutions involved	What aspects of the experience stand out as innovative and/or successful? What institutions have participated? What is the contribution of each institution? How are they coordinated?

4. Impact evaluation

Monitoring and evaluation system	What are the quantitative and qualitative indicators to measure the experience's success? How is information collected? Who carries out the measurement? How are other institutions and the target group involved?
Impact areas	What are the impact areas of the experience?
Results /Impacts	What are the main results and quantitative and qualitative impacts in the target group and in the environment?
Transversal subjects	What impacts are obtained in the reduction of poverty, in the development of the environment, and in gender aspects?
Cost / Benefit Analysis	What are the social and economic costs and benefits? How is the cost-benefit relationship with and without the experience?
Sustainability	What is the degree of durability of the impacts? Do impacts remain at the end of the intervention? Do the generated innovations stay? Are financing needs covered?
Replicability	What is the degree of replicability? - transfer possible without adaptations - pilot phase required to be able to carry out necessary adaptations - parties must adapt to the context, the concept stays - conceptual adaptations required to the concept

5. Lessons learned

Difficulties overcome	What difficulties have arisen? How were they overcome? What suggestions are made to prevent difficulties?
Success factors	What success has been achieved? What success factors have been identified (external and internal)? What is recommended for future processes?
Mistakes to be avoided in the future	What mistakes have been made? Which were the causes for the mistake? What is recommended for future processes?

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