Guidance on Facilitating Pause & Reflect Activities for ILAB Worker Rights Programs

Contents

ACRONYM LIST

AAR	After-Action Review
DOL	Department of Labor
ILAB	Bureau of International Labor Affairs
OTLA	Office of Trade and Labor Affairs
PMP	Performance Monitoring Plan
RBT	Rose, Bud, and Thorn
WWW	What? So What? Now What?

Guidance on Facilitating Pause & Reflect Sessions for ILAB Worker Rights Programs

INTRODUCTION

This guidance document is intended to be a resource, not a requirement, for ILAB worker rights programs to help staff and project teams engage in ongoing learning. This document provides an overview of what Pause and Reflect sessions are, when they may be useful, common roles, and some general guidance for facilitating Pause and Reflect sessions. It then provides specific details on how to conduct three specific types of Pause and Reflect activities: Rose, Bud, and Thorn; What? So What? Now What? (WWW); and After-Action Reviews (AARs). The document also provides guidance on how to document and disseminate the results of Pause and Reflect sessions to ensure that learnings are translated into relevant actions/program improvement. Finally, this guidance provides a resource guide with links to resources on additional types of Pause and Reflect activities and topics.

There are many good ways to conduct Pause and Reflect activities. To keep this guidebook short and easy to use, we have only described a few Pause and Reflect activities in this guidebook, but many more exist. ILAB hopes this resource will be useful for project teams. But ultimately our goal is to encourage teams to engage in reflection activities in whatever intervals and formats work best for their projects.

PAUSE & REFLECT SESSION OVERVIEW

Pause and Reflect sessions are a component of learning and adaptive management. These sessions are designed to help teams take time to think critically about ongoing or recently completed activities and processes and identify important lessons learned that could impact the way the team works in the future. Pause and Reflect sessions may be stand-alone activities or they may be discussions included in the agendas of other meetings.

> "We do not learn from experience… we learn from reflecting on experience."
>
> ~John Dewey, Educator

Staff may choose to hold Pause and Reflect sessions at any time to capture important team learnings. These may include:

- Regular (e.g., quarterly or biannual) stand-alone Pause and Reflect sessions to document what has been learned during that period. For example:
  - For projects, these may be particularly helpful during the TPR writing process to review monitoring data and identify key lessons learned for reporting. (See "Monitoring, Evaluation, and Learning" section of the TPR.)
  - For ILAB project managers, these may be helpful to hold with implementers annually or bi-annually after TPR submission.

- Shorter (e.g., 10-15 minute) Pause and Reflect sessions held during regular (monthly or weekly) team meetings.
- Ad hoc Pause and Reflect sessions after major project events (e.g., training, launch of a new electronic management software, community listening session, etc.).

There are four major roles in every Pause and Reflect session: the moderator, the participants, the note taker, and the reporter.

- **Moderators** help to plan the session with the help of project leadership, and during the session, they facilitate the discussion. Their focus is on creating an environment suitable for learning, making sure all participants have a chance to share their ideas, and keeping the discussion on track and on time. Typically, moderators are people who have not been directly involved in the learning. That is, they are people who will not share their observations or learnings about the session topic. These may be external consultants brought in for the event or internal staff who were not directly involved in implementing the program or activity being discussed (e.g., Monitoring, Evaluation, and Learning staff or Project Manager), depending on the resources available and the formality of the Pause and Reflect session.
- **Participants** answer questions posed by the moderator to share their observations and learnings. These are typically people who were directly involved in implementing the program or activity being discussed. This may include program staff and/or stakeholders external to the program, depending on the purpose of the Pause and Reflect session and the preferences of the team. Participants do not typically need to do much preparation for the Pause and Reflect session. But if the Pause and Reflect session is discussing activities that happened more than a week prior to the session, it may help for participants to take a few minutes on their own prior to the session to think back on the activity and note anything important they want to remember to discuss.
- **The note taker** takes notes during the Pause and Reflect session. Sometimes the moderator can serve as the note taker, but it is often helpful to have a separate person do this job to allow the moderator to focus on facilitating the discussion. If the note taker is also a participant, it may be helpful to have a secondary note taker who can take notes while the note taker is sharing their own observations and learnings. In general, the note taker should try to take notes so that all participants can see them (e.g., on a white board or in a document that is projected and/or shared with participants). This helps to ensure a common understanding of and agreement to what was said.
- **The reporter** uses the notes to summarize what was discussed in the Pause and Reflect session, highlighting recommendations and next steps. Typically, this role is held by a participant in the Pause and Reflect session. It is also possible for the note taker to fill this role.

FACILITATION BASICS

When facilitating Pause & Reflect sessions, focus on ensuring all attendees are included and have the opportunity to share their ideas. How you do this may differ based on the team's culture, but some techniques for creating an environment that is conducive to sharing openly include:

- Pay attention to power/group dynamics when planning and facilitating the Pause and Reflect session.

  - When planning, weigh the benefits of inviting leadership (e.g., they were involved in implementing the topics being discussed and would have helpful feedback, their presence would emphasize the importance of the event, etc.) compared to the benefits of limiting participation to a group of peers (e.g., this would make people feel more comfortable sharing constructive criticism, this would result in a more relaxed, honest, and learning-focused meeting).
  - When facilitating, consider power dynamics and ensure those with less perceived power are invited to share at least as much as those with more perceived power.
  - In large groups or groups with potentially tricky power dynamics, consider allowing time for individual thinking and reflection, followed by discussion in pairs or small groups, before asking people to share in the plenary group.
- Invite input from leadership to reinforce their interest in learning and the importance of hearing from all participants. If leaders are invited to join the session, this may come in the form of an introduction/closing comment from a leader. If leaders are not invited to join the session, this may come in the form of an email prior to the event, encouraging participants to attend and share openly.
- Encourage participants to share their honest opinions, reminding them that it is okay to disagree.
- Appreciate and recognize candid feedback.
- Keep it positive by focusing on learning and avoiding the assignment of blame for any negative experiences.
- Guide the discussion with open-ended questions.
- Summarize/re-state what you hear from participants often to ensure common understanding.
- Avoid adding your own opinion; simply accept what participants say and let them determine what was positive and negative.
- If the event is hybrid, with some people in-person and others joining remotely, make sure all in-person and online participants are equally engaged. Consider having someone other than the facilitator tasked with regularly checking if any online participants have raised hands or have shared written comments and reporting to the facilitator.
- Take notes where all participants can see them and encourage participants to correct you if they disagree with something you write to ensure a common understanding of and agreement to what was said.

SUMMARY

Pause and Reflect sessions are essential to our shared work. They are foundational to adaptive management because we cannot know and plan everything in advance. When working on complex programs in dynamic settings, much of the knowledge we need is only available along the journey. If we keep walking without stopping to reflect on what has happened, we cannot harvest the important lessons that we need to continue the journey successfully.

Furthermore, it is important to do this reflection work in community, with our colleagues. This allows us to multiply learnings by gathering information from people with different vantage points. When done well, it also strengthens communication and builds trust within teams, which are also critical to project success.

For these reasons, ILAB strongly encourages its staff and implementing partners to engage in Pause and Reflect sessions. The next sections of this document provide instructions on how to facilitate three simple approaches for group reflection. Table 1 compares these approaches. Once your team is confident with these three approaches, consider using the Resource Guide on page 21 to explore other Pause and Reflect approaches or adapting the questions to a specific point in the activity lifecycle.

Table 1. Comparison of Three Pause and Reflect Approaches

	Rose, Bud, Thorn	What? So What? Now What?	After-Action Review
Purpose	To support a **balanced discussion of positive and negative aspects** and experience and to identify and prioritize areas for improvement and next steps	To build shared understanding of what happened, what it means for the group/program, and **what actions the group/program should take** based on that.	To identify **actionable lessons** that can be used to repeat successes and minimize challenges **for similar events conducted in the future**.
When to Use	After any kind of shared experience (e.g., event/activity or a project retrospective).	After any kind of shared experience (e.g., event/activity or a project retrospective). To reflect on program data.	After an event that will be conducted repeatedly.
Preparation Time Required	45-90 minutes	45-90 minutes	45-90 minutes
Implementation Time Required	45-60 minutes	45-60 minutes	15 minutes-2 hours
Resources Required	Group note taking materials (e.g., white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes)	Group note taking materials (e.g., white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes) Individual note taking materials for each participant (e.g., pen/pencil and paper)	Group note taking materials (e.g., white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes)

Rose, Bud, and Thorn

ROSE, BUD, AND THORN

RESOURCE

Rose, Bud, and Thorn Guidance

OVERVIEW

Purpose: Rose, Bud, and Thorn (RBT) is a structured guide for reflecting on a situation, project, or experience. The purpose is to support a balanced discussion on both the positive and negative aspects of the experience and to identify areas for improvement.

Structure: RBT consists of three general areas of discussion:

- **Rose:** This represents beauty and positivity. What are the positive aspects of the situation, project, or experience? What is going well? What do we appreciate, enjoy, or find successful?
- **Bud:** This represents potential or opportunities for growth. What can be improved in the situation, project, or experience? Where do we see opportunities for growth, improvement, development, or positive change? (Consider both the experience itself and the broader context.)
- **Thorn:** This represents the difficulties and pain points, including challenges, obstacles, and negative aspects. What has been challenging about the situation, project, or experience? What obstacles have we run into? What problems or issues need to be addressed?
- **Tending the garden:** This represents discussions about ways that the team can cultivate positive aspects of the situation (roses), address challenges (thorns), and nurture key opportunities (buds). What challenges and opportunities should be prioritized? What are the next steps?

When to Use This Format: RBT can be useful after a group has any kind of shared experience, be it a specific event/activity or a project or sub-project retrospective (e.g., in a learning event intended to review what happened in the previous quarter).

The What? So What? Now What? (WWW) activity described in the next section can also be used in these situations, but RBT has a slightly different focus. RBT focuses more on identifying positive and negative aspects of the experience and potential areas of growth, whereas WWW focuses on determining what to do with lessons learned from a shared experience. After-Action Reviews (AARs), described in the third section, have a similar focus as RBT, but AARs are typically used to reflect on events/activities that will be repeated so that lessons learned can be implemented in the next iteration of the activity.

PLANNING

Time Required: Staff may spend 30-60 minutes arranging the logistics of the RBT activity. Beyond this, preparing for a RBT requires very little time (15-30 minutes) for the moderator once s/he is familiar with the RBT structure.

Resources Required: None

Leadership Preparation: Preparation typically includes:

- Selecting a specific topic or situation for the team to discuss. This could be a recent activity, a review of a project period (e.g., the last quarter), or any other relevant subject.
- Determining the time and place of the RBT.
- Selecting and scheduling a moderator. (This may be someone internal or external to the organization, but it should not be someone who was directly involved in the shared experience.)
- Selecting and scheduling a note taker, if desired.
- Selecting and scheduling a report writer, if desired.
- Deciding who should attend the RBT.
- Scheduling the meeting and ensuring all relevant participants are invited.

Moderator Preparation: Preparation typically includes:

- Creating/revising a RBT handout/note-taking document to share with participants (see example on page 6). Consider what specific questions you want to ask related to the topic of discussion.

Participation Preparation: No specific preparation is required. However, if the RBT activity is being conducted one or more weeks after the shared experience, participants may want to take some time to recall the experience and/or review any notes they have on it.

IMPLEMENTATION

Time Required: RBT activities can be 45 minutes to an hour in length, depending on the needs and preferences of the team.

Resources Required: The RBT activity requires materials for taking/sharing notes with the team. Depending on the team's preferences and whether the RBT activity is held in-person or virtually, the moderator may want to prepare a white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes.

Instructions for Moderator:

Introduction and Ground Rules

Begin by introducing yourself and reviewing the purpose of the RBT. Explain the general sequence of questions (Rose, Bud, Thorn) so that participants will have an idea of what questions are coming and when they might raise certain topics. Go over some ground rules to ensure the team is coming into the RBT with the right mindset. Also explain your role so participants will know what to expect from you. (Examples of ground rules and some moderator roles are provided in the Example RBT Handout/Note Taking Document on page 6.)

Rose

Open the discussion by asking participants to share the positive aspects of the experience or activity. Some example prompts include:

- What was the high point of the activity/experience/quarter?
- Describe the efforts that you think have been most successful. Why do you believe they were successful? How did the team achieve that success?
- What are you most pleased with about the activity/experience/quarter?
- What did you enjoy about the activity/experience/quarter?

Bud

Once all positive aspects are shared, move on to the discussion of growth. As the moderator, encourage participants to be optimistic, focusing on the positive aspects of growth, such as what can be improved rather than what is going badly. Some example prompts include:

- What is currently working but could be improved in the future?
- What upcoming possibilities excite you?
- What opportunities require development and nurturing?

Thorn

Finally, ask participants to reflect on difficulties or pain points. These are areas that are not functioning properly and may need to be heavily modified. However, these are also areas to identify new areas for improvement. While facilitating this part of the discussion, encourage participants to identify opportunities for improvement and add those to the “Bud” section of the notes. Some example prompts for this topic include:

- What steps would you have taken differently? What do you wish you had/had not done?
- What hindered your progress?
- What was the most stressful aspect of the experience?
- What difficulties did you encounter?
- What was the source of the problem?

Discuss, Prioritize, and Identify Next Steps

After noting all the roses, buds, and thorns, facilitate a discussion about key points. Ask participants to brainstorm solutions (buds) for any thorns for which they have not already identified opportunities for improvement. Then lead participants in an exercise to prioritize the buds. Which are most important to address? Are there any dependencies between the buds (e.g., X needs to be addressed before we can do Y)? Based on this discussion, ask participants to identify action items/next steps.

Closing Comments

End the session by reviewing and summarizing key points from the discussion. Make sure to leave on a high note by connecting observations to action items that can improve the future. If desired, you can also have program leadership provide some closing remarks. Be sure participants leave with an understanding of what will come next in terms of follow-up and next steps.

Example Rose, Bud, Thorn Handout/Note Taking Document

Rose, Bud, Thorn: *[Activity]*

[Date], *[Time]*

Facilitator: *[Name]*

Note Taker: *[Name]*

Objective: *[This can be adapted to fit your team's needs. A suggestion is provided.]*

- Identify and document lessons learned from the *[activity]*, so that they can inform future *[activities]*.

Ground Rules: *[These can be adapted to fit your team's needs. Some suggestions are provided.]*

- We all actively participate.
- We value each other's input.
- We aim for consensus, when possible, clarification when not.
- We keep it positive and stay open to new ideas.
- We are committed to identifying opportunities for improvement and recommending solutions to barriers.

Moderator's Role:

- Keep group on task and on time
- Encourage everyone to participate
- Create an open environment, in which people are free to express new ideas and recommend changes or solutions
- Introduce the way ahead

Notes:

Rose: Positive aspects of the activity. *[Add sub-questions/probes, as needed.]*

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Bud: Opportunities for growth/improvement *[Add sub-questions/probes, as needed.]*

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-

Thorn: Difficulties or pain points *[Add sub-questions/probes, as needed.]*

-
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Tending the Garden

Prioritization of Buds/Thorns

1.
2.
3.

Action Items/Next Steps

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What? So What? Now What?

WHAT? SO WHAT? NOW WHAT?

RESOURCE

What? So What? Now What? Guidance

OVERVIEW

Purpose: What? So What? Now What? (WWW) is a reflection activity that can be facilitated after a group has any kind of shared experience. The purpose is to build shared understanding of what happened, what it means for the group/program, and what actions the group/program should take based on that. The goal is to ensure that learning is generated from these shared experiences.

Structure: WWW consists of three general questions, each of which can be broken down into sub-questions:

- **WHAT?** (Describing what happened) What happened? What did you notice, focusing on facts or observations? What facts or observations stood out to you?
- **SO WHAT?** (Analyzing and making sense of what happened) How did you feel when it happened? What caused this event? Was this an anomaly or part of a broader pattern? Why was this important? What hypotheses can we make about this?
- **NOW WHAT?** (Identifying next steps) What lessons can we take forward in similar situations? What would we do differently/the same if a similar situation arose in the future? How could we test our assumptions or hypotheses about why this happened? What actions make sense for us to do now that this has happened?

When to Use This Format: WWW can be useful after a group has any kind of shared experience, be it a specific event/activity or a project or sub-project retrospective (e.g., in a learning event intended to review what happened in the previous quarter). It can also be used to reflect on program data (e.g., bi-annual monitoring data) by tweaking the WHAT? question to describe what the data say rather than what happened.

The RBT activity described in the previous section can also be used in these situations, but WWW has a slightly different focus. WWW focuses on determining what to do with lessons learned from a shared experience, whereas RBT focuses more on identifying positive and negative aspects of the experience and potential areas of growth.

PLANNING

Time Required: Staff may spend 30-60 minutes arranging the logistics of the WWW activity. Beyond this, preparing for a WWW requires very little time (15-30 minutes) for the moderator once s/he is familiar with the WWW structure.

Resources Required: None

Leadership Preparation: Preparation typically includes:

- Determining the time and place of the WWW.
- Selecting and scheduling a moderator. (This may be someone internal or external to the organization, but it should not be someone who was directly involved in the shared experience.)
- Selecting and scheduling a note taker, if desired.
- Selecting and scheduling a report writer, if desired.
- Deciding who should attend the WWW.
- Scheduling the meeting and ensuring all relevant participants are invited.

Moderator Preparation: Preparation typically includes:

- Creating/revising a WWW handout/note-taking document to share with participants (see example on page 11).

Participation Preparation: No specific preparation is required. However, if the WWW activity is being conducted one or more weeks after the shared experience, participants may want to take some time to recall the experience and/or review any notes they have on it.

IMPLEMENTATION

Time Required: WWW activities can be 45 minutes to an hour in length, depending on the needs and preferences of the team.

Resources Required: The WWW activity requires materials for taking/sharing notes with the team. Depending on the team's preferences and whether the WWW is held in-person or virtually, the moderator may want to prepare a white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes.

The moderator should also ensure all participants have a pen/pencil and paper to take their own notes.

Instructions for Moderator:

Introduction and Ground Rules

Begin by introducing yourself and reviewing the purpose of the WWW. Explain the general sequence of questions (what? so what? now what?) so that participants will have an idea of what questions are coming and when they might raise certain topics. Go over some ground rules to ensure the team is coming into the WWW with the right mindset. Also explain your role so participants will know what to expect from you. (Examples of ground rules and some moderator roles are provided in the Example WWW Handout/Note Taking Document on page 11.)

Discussion

Open the discussion by asking participants to describe what happened. Remind them to focus on the facts and their observations, doing their best to remove any assumptions they made about those observations. (E.g., Observation: “The participant nodded her head and smiled as I explained the rules.” vs. Assumption based on observation: “The participant understood the rules I explained to her.”) As you take notes on participants’ observations, it may be helpful to sort them into similar categories (e.g., observations and feelings) or to put them in chronological order.

Once all observations are shared, move on to the SO WHAT? discussion. It can take time for people to link observations to patterns, so give participants plenty of time to think on this section. It may be helpful to give participants a few minutes to think and jot down SO WHAT? answers quietly on their own before asking them to share their ideas with the group.

When participants are done analyzing the experience, ask them to reflect on next steps with the NOW WHAT? questions. Again, it may take participants time to think about the actions they want to take, so consider giving them a few minutes to think on their own before initiating group sharing.

Closing Comments

End the session by reviewing and summarizing key points from the discussion. Make sure to leave on a high note by connecting observations to recommendations for the future. If desired, you can also have program leadership provides some closing remarks. Be sure participants leave with an understanding of what will come next in terms of follow-up and next steps.

Example What? So What? Now What? Handout/Note Taking Document

What? So What? Now What?: *[Shared Experience]*

[Date], [Time]

Facilitator: *[Name]*

Note Taker: *[Name]*

Objective: *[This can be adapted to fit your team's needs. A suggestion is provided.]*

- Identify and document lessons learned from the *[shared experience]*, so that they can inform future *[shared experiences]*.

Ground Rules: *[These can be adapted to fit your team's needs. Some suggestions are provided.]*

- We all actively participate.
- We value each other's input.
- We aim for consensus, when possible, clarification when not.
- We keep it positive and stay open to new ideas.
- We are committed to identifying opportunities for improvement and recommending solutions to barriers.

Moderator's Role:

- Keep group on task and on time
- Encourage everyone to participate
- Create an open environment, in which people are free to express new ideas and recommend changes or solutions
- Introduce the way ahead

Notes:

WHAT? Describe what happened *[Add sub-questions/probes, as needed.]*

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SO WHAT? Analyze/make sense of what happened *[Add sub-questions/probes, as needed.]*

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NOW WHAT? Identify next steps *[Add sub-questions/probes, as needed.]*

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After-Action Review

AFTER-ACTION REVIEW (AAR)

RESOURCE

After-Action Review Guidance

OVERVIEW

Purpose: An After-Action Review (AAR) is a post-event reflection that allows team members and leaders to discuss what happened and why, reviewing both successes and challenges. The purpose is to pull out actionable lessons that can be used to repeat successes and minimize challenges for similar events conducted in the future. In an AAR, teams also review the goals and tasks of the event and assesses whether these goals and tasks were effective. Finally, teams identify next steps for meeting event goals after the event is complete and recommendations for improving future iterations of the event.

Structure: AARs consist of five general questions:

- What was intended to happen?
- What actually happened?
- What went well and why?
- What did not go well and why?
- What are we going to do?

As needed, moderators can add questions to probe participants for more detail.

When to Use This Format: Because the focus of AARs is on identifying lessons learned that can be incorporated in future iterations of the event/activity, AARs are most useful when used with events that are regularly conducted rather than for one-time events. This allows for ongoing learning and adaptation, with each iteration of the event/activity building on lessons learned in previous iterations. Ideally the AAR will take place as quickly as possible after the conclusion of the event.

AARs have a similar focus as the Rose, Bud, and Thorn (RBT) activity described in the first section. But AARs are typically used to reflect on events/activities that will be repeated so that lessons learned can be implemented in the next iteration of the activity, whereas RBT can be used with one-off events/activities.

PLANNING

Time Required: Staff may spend 30-60 minutes arranging the logistics of the AAR. Beyond this, preparing for an AAR requires very little time (15-30 minutes) for the moderator once s/he is familiar with the AAR structure.

Resources Required: None

Leadership Preparation: Preparation typically includes:

- Determining the time and place of the AAR.
- Selecting and scheduling a moderator. (This may be someone internal or external to the organization, but it should not be someone who was directly involved in the event.)
- Selecting and scheduling a note taker, if desired.
- Selecting and scheduling a report writer, if desired.
- Deciding who should attend the AAR.
- Scheduling the meeting and ensuring all relevant participants are invited.

Moderator Preparation: Preparation typically includes:

- Creating/revising an AAR handout/note-taking document to share with participants (see example on page 16).

Participation Preparation: All participants should have been involved in the event to be discussed. No specific preparation is required. However, if the AAR is being conducted one or more weeks after the event was held, participants may want to take some time to recall the event and/or review any notes they have on the event.

IMPLEMENTATION

Time Required: AARs can be 15 minutes to 2 hours in length, depending on the needs and preferences of the team.

Resources Required: The only resources required are the materials the moderator/note taker will use to take/share notes with the team. Depending on the team's preferences and whether the AAR is held in-person or virtually, the moderator may want to prepare a white board (with white board markers and erasers), large note pad (with pens/markers), or shareable online document for taking and sharing notes.

Instructions for Moderator:

Introduction and Ground Rules

Begin by introducing yourself and reviewing the purpose of the AAR. Explain the general sequence of questions (what was intended to happen? what happened? what went well and why? what did not go well and why? what could be improved and how?) so that participants will have an idea of what questions are coming and when they might raise certain topics. Go over some ground rules to ensure the team is coming into the AAR with the right mindset. Also explain your role so participants will know what to expect from you. (Examples of ground rules and some moderator roles are provided in the Example AAR Handout/Note Taking Document on page 16.)

Discussion

Open the discussion by asking participants to describe what they intended to do during the event. Start by looking at the big picture by asking a broad question, such as, "Thinking broadly about this event, how would you describe what you intended to do in one sentence?" This will help you get a general overview of the event. Then, you can probe to get information on details, such as the purpose and objectives, the audience, the timing of the event, the people involved, the intended outputs and outcomes, underlying context of the event, etc.

Go through the next three questions, using similar techniques. You may want to start broad and then probe for more details, or you may want to encourage participants to think about questions in chronological order or in order of specific topics or themes related to the event. Throughout the AAR, use the following techniques:

- Ask participants to be specific and avoid generalizations.
- Be thorough, ensuring time and space to cover all relevant aspects of the event.
- Encourage participants to identify suggestions/solutions for improving future events, whether that be by replicating what went well or changing what did not go well.

Finally, guide the participants in making an action plan to determine what needs to be done next. Begin by identifying the next major decision point (i.e., the next time the activity/event discussed in the AAR will be conducted). Ask participants to identify what needs to be done before the next major decision point and what needs to be done in the long term, including who will do it and by when. Finally ask participants what things to *not* do in the future and why.

Closing Comments

End the session by reviewing and summarizing key points from the discussion. Make sure to leave on a high note by connecting observations to recommendations for future improvement. If desired, you can also have event/program leadership provides some closing remarks. Be sure participants leave with an understanding of what will come next in terms of follow-up and next steps.

Example After-Action Review Handout/Note Taking Document

After Action Review: *[Event Name]*

[Date], [Time]

Facilitator: *[Name]*

Note Taker: *[Name]*

Objective:

- Identify and document lessons learned from the *[event]*, so that they can be used in future *[events]*. This includes:
  - Understanding what went well and should be repeated
  - Understanding what could be done differently to improve future proposals

Ground Rules: *[These can be adapted to fit your team's needs. Some suggestions are provided.]*

- We all actively participate.
- We value each other's input.
- We aim for consensus, when possible, clarification when not.
- We keep it positive and stay open to new ideas.
- We are committed to identifying opportunities for improvement and recommending solutions to barriers.

Moderator's Role:

- Keep group on task and on time
- Encourage everyone to participate
- Create an open environment, in which people are free to express new ideas and recommend changes or solutions
- Introduce the way ahead

Notes:

What did we intend to do for the *[event]*?

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What did we actually do for the *[event]*?

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What went well, and why? *[Add sub-questions/probes, as needed.]*

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What did not go well, and why? *[Add sub-questions/probes, as needed.]*

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What are we going to do? (Recommendations & Next Steps)

[What is the next major decision point? What needs to be done before the next major decision point? What needs to be done in the long term? What should we stop doing?]

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Follow-Up/Documentation

FOLLOW-UP/DOCUMENTATION

Time Required: 1-2 hours

Resources Required: Document software

Follow-Up Roles and Responsibilities:

- **Note clean-up/finalization and/or summarization:** To be completed by a participant in the session, who may or may not be the primary note taker. Ideally, this person will be selected and notified prior to the Pause & Reflect session or at the beginning of the Pause & Reflect session so they can prepare for the role and take notes to complement the note taker's notes (if the designated person is different than the note taker), as needed.
- **Institutional knowledge management documentation:** To be completed by the program staff most deeply involved in any tasks/parts of the event that were identified as going well and needing to be repeated in future events. The staff will be identified during/after the Pause & Reflect session.
- **Note dissemination:** To be completed by event leadership and/or others, as needed. Note disseminators may be selected before or after the Pause & Reflect session.

How to Document/Disseminate Learnings: After the Pause & Reflect session is completed, a participant should clean up and finalize the notes for dissemination to participants and other key stakeholders, which may include other program staff and leaders and/or external partners. The final format of the disseminated notes should be decided in cooperation with event/program leadership, based on the needs of those to whom the report will be disseminated. For example, there may be some leaders and program staff who would like a full write-up of the Pause & Reflect session notes, including answers to all questions discussed. Others may prefer summarized notes or a slide deck with short synopsis of the main recommendations and/or next steps that can easily be shared with staff who will be engaging in follow-up activities. For implementing partners, the TPR, particularly the "Monitoring, Evaluation, and Learning" section, is a good tool for sharing learnings with ILAB staff. When determining the best format for distilling learnings, consider who most needs what information to translate the learnings into action.

If the Pause & Reflect session identifies any specific tasks or parts of the event that went particularly well and should be repeated in future events, it would be good to identify the program staff most involved in those aspects of the event and ask them to document exactly what they did at a level of detail sufficient to allow others to use it to repeat those tasks. This institutional knowledge management documentation should be stored in the same place as the Pause & Reflect session report and disseminated to others who are involved in similar tasks in the future.

Once the Pause & Reflect session notes finalization, dissemination, and institutional knowledge management documentation are complete, event/program leadership should share these documents with the appropriate program staff/stakeholders. The documents should also be stored in a central place, where other staff engaging in similar events in the future can easily find and access them to ensure the learnings are translated into action in future events.

How to Translate Learnings into Action: After taking the time to reflect and learn, it is critical to ensure that these learnings get converted into actions that help improve the project. Below are four strategies for ensuring that learning becomes action.

1. **Make a clear "action plan" during the Pause and Reflect session.** Every Pause and Reflect activity described in this guidance document includes time to create an "action plan" by identifying and prioritizing next steps. The action plan does not need to be a formal document/deliverable. Rather, it is a simple list of what tasks will be done (or not done) as a result of the reflection, who is responsible for ensuring each task gets done, who else will help do it, and by when it will be done. It also identifies someone who will be responsible for tracking and overseeing the completion of all tasks in the action plan.

   However, when there is rich discussion about what people have learned, it is often tempting to let that conversation continue and end up running out of time at the end for action planning. But it does not matter how much is learned if there is no plan in place to use the learnings. There are a couple of ways to ensure that the action planning stage is not missed. First, consider weaving the creation of the action plan throughout the discussion rather than saving it for the end. So, after someone shares a learning about something that worked well or something that can be improved, ask the group to come up with an action plan related to that learning before they move on to discussing the next learning. Alternately, consider setting a timer that will go off 15-20 minutes before the end of the session. At the beginning of the Pause and Reflect session, tell participants that you have set this timer loud enough for all to hear it. Let them know that when it goes off, you will ask the person speaking to quickly finish their thought, and then you will move on to discussing the action plan.

2. **Be honest about enablers and blockers.** When creating the action plan, encourage participants to think about what might help or hinder them from carrying out the action plan and what can be done to get around any potential barriers to action. Are there other stakeholders that need to buy in to the plan? Will additional resources be needed? Are there staff time limitations that need to be addressed by reprioritizing other tasks? Are there existing stakeholders or resources that can be used to support the completion of the action plan? Etc. By identifying these enablers and determining ways to mitigate any blockers early, staff will be better able to take action based on their learnings.

3. **Ensure learnings are translated into action.** The pause and reflect session will only be effective if learnings are translated into actions, so it is important to have someone responsible for tracking and overseeing completion of tasks in the action plan. Again, this does not need to be a formal document/deliverable, but documentation of what has happened may be helpful for ensuring that the tasks are completed and for use in mid-term or final evaluations to show how the project has adapted. There are many project management tools and techniques that can be used to track the action management plan. One simple method is to create a table with each action item listed in a row and columns for the person/people responsible for completing the action item, the deadline for completion, the status of the action item, and notes. The person responsible for overseeing the

completion of the action plan can meet regularly with the people responsible for each action item to get status updates or can ask the people responsible for each action item to update the table on a regular basis.

4. **Use a systems approach to enacting the action plan.** The action plan may require the involvement of stakeholders (e.g., project staff/leaders, community leaders) who were not involved in the Pause and Reflect session. When creating the action plan, identify the other stakeholders that need to be involved in carrying out the action plan and decide the best way(s) to engage them and get their feedback.

Resource Guide

RESOURCE GUIDE

OTHER PAUSE & REFLECT ACTIVITIES

Emergent Learning Table Conversations | This resource provides guidance on Emergent Learning (EL) Table Conversations, another type of Pause & Reflect activity not covered above. EL is “a set of principles and practices that help people across a system think, learn and adapt together in order to overcome complex challenges and achieve important social change goals.” The resource provides an overview of EL Table Conversations, explains EL principles and practices, and links readers to additional EL publications and an EL community.

Liberating Structures | This resource suggests 33 additional activities (Liberating Structures) that can be added to meetings to facilitate reflection. The website includes an introduction to the idea of Liberating Structures, descriptions of each activity, and field stories describing how others have used these Liberating Structures.

CLA Toolkit: Facilitating Pause & Reflect | This USAID Learning Lab resource lists and provides brief descriptions of additional types of group-based Pause & Reflect activities. It also provides links to additional resources where you can learn more about each type of activity.

PAUSE & REFLECT QUESTIONS

What Should We Focus on When We Pause and Reflect at Different Stages of Activity Implementation? | This resource provides suggestions for general topics and specific questions that can be asked at various stages of program implementation.

ADDITIONAL RESOURCES

Everything Pause and Reflect (Almost) | This resource provides a brief overview of the purpose of Pause & Reflect activities and lists additional resources that you may find useful.