# PAUSE & REFLECT PLANNING TOOL

**Pause and Reflect** is central to collaborating, learning and adapting (CLA) as well as to improving programming and development outcomes. USAID defines pause and reflect (P&R) as "a component of learning and adaptive management, the act of taking time to think critically about ongoing activities and processes and plan for the best way forward." Therefore, P&R can be thought of as encompassing a broad range of activities that provide structure and intentionality to taking stock of organizational processes in addition to programming outcomes, successes, and challenges. Furthermore, P&R sessions can generate learning, knowledge, and even data that contribute to evidence-based decision-making and adaptive management.

It is recommended to pause periodically to reflect on new learning and knowledge and adapt accordingly. The following tool offers guiding questions for consideration as you plan for a P&R session. It borrows from the "Designing and Facilitating Learning-Focused Meetings" resource in the USAID CLA Toolkit.

## Guiding Questions for Planning

### Purpose: What are the objectives of this P&R? What decisions are you trying to inform?

Define the purpose, goal, or outcome of the meeting and its objectives. Make sure there is alignment with other strategies or timelines that this meeting may feed into and ask, "what will we do with the(se) outcome(s)?"

### Participants: Who needs to be in the room to accomplish the articulated objectives?

Think about active participation and what each attendee would bring to the conversation or output. For example, which staff (leadership, MEL staff, technical teams, etc.) and possible external stakeholders/partners should be represented?

### Roles and Responsibilities: Who will do what?

It is important to define and communicate roles as the planning process unfolds. Roles and definitions will be different depending on the objectives and the meeting format. Some examples may include:

- Senior leadership - helps set expectations and context of the objectives and use of outcomes
- Facilitator - agenda setting, P&R management
- Note-taker - takes notes and helps compile the report
- Logistics coordinator - venue, participant communications

### Tone: How formal or informal will the session be?

Pause and reflect doesn't only occur in big, formal meetings and retreats. It can happen informally even in small groups. Regardless of the level of formality, it is important that the tone of any P&R be learning-oriented and focused on improvement and adaptive management rather than blame or fault-finding.

## Engagement: What activities and participatory techniques will you include to encourage inclusive and candid conversation?

There are a variety of meeting formats and facilitation techniques to help engage participants, encourage learning, and increase effective use of time. This CLA Toolkit resource - P&R Activity Options and Resources - outlines various techniques that can be used depending on the objective, audience, and the amount of time you have. You can use more than one idea in a session to mix and match based on desired outputs.

## Data and Evidence: What data and evidence can you bring to inform the conversation?

Pause & Reflect sessions look back and reflect on a specific strategy or activity, so it is important to incorporate data and evidence (both qualitative and quantitative) you have collected about what you will review. Consider what data and evidence will be helpful to the discussion and how to best display/visualize and share it. Also consider if you want to share the data and evidence with your participants ahead of time as pre-reading.

## Timing & Duration: When should you hold the session? How long will you need?

When planning your session, consider both when to hold the P&R so that it can inform any decisions that need to be made (e.g., hold the session before work-planning rather than after, or, in the case of an After Action Review, soon after the activity the AAR will cover) and how long you will need in order to accomplish your objectives. P&R sessions do not have to be long.

## Phasing: Would it help to break down the P&R into multiple phases/stages?

Given the objectives and your participants, it may make sense to hold the P&R in multiple phases or stages, for example if you want to target different audiences (e.g., first with internal staff and then with external stakeholders). Internal, informal P&R sessions can be useful in preparing for a larger, more formal P&R event.

## Venue and Set-Up: Where will you hold the P&R? How does the space need to be set up?

When considering venues, make sure the space is big enough to accommodate participants and chosen format (classroom seating, small groups, breakout rooms, etc.). Consider carefully how you will integrate technology (presentations, audio, interpretation, virtual participants, etc.).

## Materials: What materials will you need for the session?

Depending on the design of your P&R, you may need flipcharts, sticky notes, worksheets, etc. After you design your agenda or facilitation plan, make note of what supplies you will need and have them available and ready.

## Next Steps and Follow-Up: What follow-up meetings might be needed? Who will manage action items that might arise?

Once objectives have been defined and there is an understanding of what will be done with the outcomes, make sure forward planning and/or programming is also being considered.

This resource is made possible by the support of the American People through United States Agency for International Development (USAID). The content of this report is the sole responsibility of Social Impact, Inc. for USAID/Vietnam under USAID Learns and does not necessarily reflect the views of USAID or the United States Government. It was produced for the Learning Dojo implementing partner capacity building program implemented by USAID Learns and sponsored by USAID/Vietnam.