Pause & Reflect TOOLKIT

A collection of resources to help teams learn from their biodiversity conservation work and adapt accordingly.
CONTRACT INFORMATION
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Pause & Reflect Toolkit

INTRODUCTION

What does it mean to “pause and reflect”? The U.S. Agency for International Development’s (USAID) Automated Directives System Chapter 201 defines pause and reflect 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.”

There are many ways to pause and reflect. This toolkit provides options for pause and reflect activities, helping you choose the correct option for your audience. It also provides templates and example materials and facilitation guidance for pause and reflect activities, including annual pause and reflect workshops.
Pause & Reflect Toolkit

NAVIGATION

Use this tool throughout the process

Adaptive Management Workbook
One-stop shop to collect data, discuss it during the workshop, and document your decisions

Start Here

Pause & Reflect Design Worksheet
Decide which pause and reflect process is best for the context

Design and Preparation

Good Practices Guide
The best starting point for a pause and reflect process based in the activity cycle

Agendas
Agendas annotated with considerations to guide you in designing the right pause and reflect for your context

Workshop Prep Checklist
Prepare for any type of workshop within the Program Cycle

Accessing Facilitators
Find the right facilitator(s) for your team

Team Charter
Clarify roles and responsibilities across team members

Common Problems
Learn from previous facilitation experiences to get ahead of potential issues

Implementing the Process

Stoplight Diagrams
Learn more about a common tool used during pause and reflects

Collaborative Platforms
Draw from existing Mural/Miro boards to design yours

Slide Deck
Draw from common slides used in pause and reflect processes

Facilitation Resources
Existing resources on facilitation of pause and reflects and beyond

Follow-up

Example Workshop Reports
Inspiration for workshop reports (if requested)

After-Action Review
Useful follow-up to ensure improved future processes
The Pause and Reflect Design Worksheet helps you build the ideal pause and reflect process for your context. Use the worksheet alongside the Pause and Reflect Guide and other relevant tools in this toolkit to support the design, preparation, facilitation, and follow-up for pause and reflect processes.

**How to use:**
- Make a copy of the worksheet—you can choose to use it individually or as a team.
- Review the first page in the worksheet and decide which type of pause and reflect process is relevant for your circumstances.
- Answer the questions in the worksheet throughout the design of the pause and reflect process. Note: Your answers may change as preparations continue. This worksheet can be a helpful tool to document your decisions.
The Adaptive Management Workbook supports teams throughout the adaptive management cycle. Ideally, it is used during activity start-up, and continues to be used during pause and reflect processes. There are five tabs in this workbook:

1. Results Chains
2. Actions & Progress
3. Outcomes and Indicators
4. Learning Questions (Simplified)
5. Learning Questions (Detailed)

How to use:

▸ You can use this workbook during the activity start-up process, and also pick it up at any time during the life of the project.

▸ Tailor the workbook to meet your team’s needs and existing systems.

▸ Read the instructions on each tab for further details.
The Good Practices Guide for Pause and Reflect in the Activity Cycle includes the main concepts and good practices for periodic pause and reflect processes that implementing partners and USAID host collaboratively. It is best suited to prepare for an annual pause and reflect process, but you may draw from it to tailor a pause and reflect process to your needs. The guide covers how to prepare for a pause and reflect and gives guidance on key elements of an annual pause and reflect process.

**How to use:**

- This guide is designed to support an annual pause and reflect activity, but many concepts in it are useful for other pause and reflect processes.
- Read through the guide to learn more about the pause and reflect process in the activity cycle. Choose which elements are important to your team and design your pause and reflect using the considerations outlined in the guide.
Pause & Reflect Toolkit

WORKSHOP PREP CHECKLIST

This tool provides a checklist for tracking completion of tasks related to planning and scoping, logistics, and delivery of workshops throughout the Program Cycle, including pause and reflect events. You can use this checklist for virtual, hybrid, and in-person workshops.

How to use:

▸ Make a copy of the checklist.

▸ Edit the fields in the checklist to be relevant to your specific workshop. Consider if anything is missing from the checklist for your context and add those details as needed.

▸ Consider discussing this checklist with the appropriate team members identified in your Team Charter.
An important step in creating a successful pause and reflect is having clarity on the process and the core team's roles and responsibilities. Use this tool to help you think through those roles and responsibilities, a general timeline, and any other factors you would like to track as a core team.

How to use:

▸ Make a copy of the Team Charter template and update the highlighted fields with your team’s details.

▸ Pre-populate the Team Charter with recommendations. To ensure everyone is on the same page, edit and validate these inputs during a team check-in meeting. Add any additional fields your team would like to track.

▸ Refer to the Team Charter Examples to see how other teams have completed their team charter, making it clearer for their context.
The Agendas folder provides annotated examples of agendas for various types of pause and reflect experiences. The annotations share insight into the decisions the facilitator made in building the agenda, and what factors you should consider as you adjust for your own context.

How to use:

- Start from the Pause and Reflect Design Worksheet. From there, you will learn what types of agendas will be most useful for you to consider as you build your own. For example, if the activity is in its first year, consider starting from the Year 1 Pause and Reflect Agenda examples.

- Copy the most relevant agenda as a starting point for your work. Think through the annotated considerations as you build your agenda.
Building the right facilitation team for your adaptive management process is important. Use this tool to help you think through the right roles and responsibilities for your team. Learn how to access facilitators skilled in the use of the Conservation Standards and other adaptive management systems.

How to use:

▸ Review this one-page resource with insight on identifying the planning team and accessing external facilitators.

▸ If your team needs a consultant to facilitate the pause and reflect process, follow the instructions and links as useful to find the facilitator(s) with the right expertise.
Measuring Impact II’s capacity development working group developed this resource, drawing from their experiences designing and facilitating pause and reflect processes over several years. This list is not exhaustive, but is a good starting point to help your core team avoid common pitfalls.

**How to use:**
- Review the potential problems in the resource.
- If any of the problems seem relevant to your context, review the possible solutions and consider implementing them where useful. Your team may use the listed solutions as inspiration for a more context specific solution.
Teams that have used a results chain to depict their theory of change may consider creating a stoplight diagram as a tool for measuring progress in the pause and reflect process. While not required, stoplight diagrams can be helpful in documenting decisions, especially if those decisions are not being documented in other materials.

How to use:
- Read the Stoplight Diagram Overview to learn the basics about stoplight diagrams and how to create them.
- Refer to the Stoplight Diagrams Examples and Exercises to see how other teams have completed stoplight diagrams and to find templates for virtual exercises.
The slides in this slide deck provide an overview of pause and reflect concepts as well as example roadmaps or timelines for in-person and virtual pause and reflect processes.

**How to use:**

- Populate and augment the slide deck you are using to introduce your pause and reflect process by copying useful slides from this resource.
- After copying, adapt the slides as you see fit.
Collaborative, online platforms such as Mural and Miro are useful tools for virtual pause and reflect sessions. Even if your team plans to do a portion of the pause and reflect in-person, you may choose to include a virtual preparation or pre-work session. These example Mural and Miro boards offer ideas for how to tailor your collaborative space to meet the objectives of your pause and reflect.

How to use:

- Review the list of examples in the resource, noting the range of examples available for reference, spanning “big picture” and topic-specific options.

- View the examples to see how each team set up their workspace, and use them as templates to build your own. The examples are formatted as PDFs or image files, so you can view them whether or not you have access to the collaborative platform.
This working list of existing resources provides several facilitation tools, created both within and outside the context of pause and reflect processes. This resource is a good starting point for additional facilitation tools beyond those outlined in this toolkit and the Good Practices Guide.

**How to use:**

- Use the [Pause and Reflect Design Worksheet](#) to help determine what type of pause and reflect is best for your context.

- Review the facilitation resources and identify those that may be most useful for your team and the process participants for sharing and learning.
Some teams may choose to document their pause and reflect experience in a workshop report. While not required, this may be a helpful way to document decisions, especially if those decisions are not being documented in other materials.

**How to use:**

- Refer to the example reports in the Google folder.
- When creating your workshop report, draw from the example reports to select report sections and fields that meet your needs.
- Make your report as succinct and to the point as possible, helping you pick up where you left off for future adaptive management processes.
An after-action review (AAR) can be a pause and reflect process in its own right. It provides space for a team to quickly share experiences on what has worked, what has not, and to improve things in the future. Teams can hold an AAR after both short and longer engagement, from a one-hour meeting to a multi-year research project. After completing a pause and reflect process, hold an AAR to discuss both logistics and technical experiences to help improve future meetings and processes. Refer to the Pause and Reflect Design Worksheet for more on AARs.

**How to use:**
- Make a copy of the Google Doc template.
- Adjust the suggested fields to meet your needs.
- Delete the prompting text in gray italics as you complete the AAR.
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BD</td>
<td>USAID Biodiversity Division</td>
</tr>
<tr>
<td>CLA</td>
<td>Collaborating, learning, and adapting</td>
</tr>
<tr>
<td>HEARTH</td>
<td>Health, Ecosystems, and Agriculture for Resilient, Thriving Societies</td>
</tr>
<tr>
<td>LOP</td>
<td>Life of project</td>
</tr>
<tr>
<td>MEL</td>
<td>Monitoring, evaluation, and learning</td>
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<tr>
<td>MI2</td>
<td>Measuring Impact II</td>
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<tr>
<td>P&amp;R</td>
<td>Pause and reflect</td>
</tr>
<tr>
<td>SA</td>
<td>Strategic approach</td>
</tr>
<tr>
<td>SOW</td>
<td>Statement of work</td>
</tr>
<tr>
<td>TOC</td>
<td>Theory of change</td>
</tr>
<tr>
<td>USAID</td>
<td>U.S. Agency for International Development</td>
</tr>
</tbody>
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*Refer to this acronym list for all documents linked in the Toolkit.*
**Conservation Standards (CS):** A widely adopted set of principles and practices that bring together common concepts, approaches, and terminology for conservation project design, management, and monitoring. Developed by the Conservation Measures Partnership and regularly updated in collaboration with the broader community, this open-source, strategic process helps conservation teams achieve lasting impact.

**F-Indicators:** Office of Foreign Assistance (F)-indicators. These are also sometimes referred to as “standard indicators.”

**Feasibility rating:** Criteria based on the degree to which a program could implement a strategic approach within likely time, financial, staffing, ethical, and other constraints.

**Miradi:** A project management software that uses multiple analysis tools, data views, reports, and common examples from conservation, or ‘building blocks’, to help conservation teams practice good, evidence-based conservation from the project to the program scale. Miradi provides teams with guidance and tools to implement the Conservation Measures Partnership’s Open Standards for the Practice of Conservation (Conservation Standards).

**Outcome statement:** A formal statement that defines in specific terms what a team expects to achieve for the key results that contribute to achieving the overall purpose or sub-purpose(s).

*Refer to this glossary for all documents linked in the Toolkit.*
+/∆ (“Plus/Delta”): A list of positives (+) and things to change in the future (∆); a frequently used method to gather feedback at the end of each day or session of a workshop.

Results chain (RC): A box and arrow graphic representation of a theory of change.

Strategic approach (SA): A set of actions with a common focus that work together to address specific threats, drivers, and/or opportunities.

Situation model (SM): A box and arrow graphic representation of a problem or context. This graphic displays the findings from a situation or problem analysis in a logical, causal fashion to convey the most important direct threats and drivers affecting biodiversity focal interests.

Stoplight diagram: A stoplight diagram provides a visual representation of progress. Stoplight diagrams are created from a results chain-based theory of change. Results chains are a visual model of a team’s theory of change.

Theory of change (TOC): A narrative description, usually accompanied by a logic model, that describes how and why a given purpose or result is expected to be achieved in a given context.

Thinking and working politically (TWP): Approach for bringing political awareness into biodiversity programming through the use of applied political economy analysis (PEA).

*Refer to this glossary for all documents linked in the Toolkit.