



PAUSE & REFLECT WORKSHOP GUIDE

SEPTEMBER 2020



WHAT IS A TRIANNUAL PAUSE & REFLECT WORKSHOP AND WHY SHOULD I DO THEM?

WHAT: [Pause & Reflect Workshops](#) are a tried and true approach to support learning, adaptive management, and strategic planning. Pause & Reflect workshops can cover a broad number of topics and be specific to a singular activity or event, or cover an entire strategy. Holding Pause & Reflect workshops triannually is an effective management tool to create space for your team to connect, consolidate learnings, and adjust workplans and programs based on evidence and in response to often shifting and complex contexts in which we work. This guidance note provides a quick overview of the rationale, timing considerations, agenda and structure, facilitation techniques, and other tips to plan and implement a successful Triannual Pause & Reflect workshop.

WHY: Pausing and reflecting on a regular basis helps us to identify what's working and what needs adapting and it allows us to consider the impact of changes in the operating environment or context. In a 2016 [blog post](#), Monalisa Salib explained that “Building in systematic opportunities to Pause & Reflect, preferably using participatory approaches based in adult learning techniques, creates an environment where candid conversations become the norm and surfaces learning that is most crucial for making informed design and implementation decisions.”

RESOURCES: When considering the value add of integrating Pause & Reflect workshops into normal team practices, check out this additional resources and examples:

- [Stopping To Think: Why It Pays To Pause And Reflect: USAID Learning Lab Webinar](#) by Stacey Young, Ian Lathrop, Amy Leo
- [Walking the Talk: LEARN's Pause & Reflect Practices](#) blog by LEARN on how they integrate Pause & Reflect into their work
- [Promoting Sustainability & Self-Reliance: Use of Group Capacity Assessment Data in Nepal](#) CLA Case Study highlighting use of Pause & Reflect CLA approaches for food security programming by USAID/Nepal
- [Cultivating Enduring Change: How Search is Playing and Learning From the Ground-Up](#) CLA Case Study highlighting Pause & Reflect activities



WHAT CORE SESSIONS SHOULD BE CONSIDERED WHEN BUILDING THE AGENDA?

There is no set agenda structure for a Pause & Reflect workshop. However, Triannual Pause & Reflect workshops that are occurring on a regular frequency will often include reflective, immediate progress/planning, forecasting, and action planning sessions. The descriptions below provides an overview of the different types of sessions that can be included in a Pause & Reflect workshop, a description of the purpose of each type of session, as well as some facilitation tools and techniques associated with each type of session.



Reflective of Accomplishments

It is often important to start out a Pause & Reflect session by acknowledging team accomplishments. This kickstarts a reflective atmosphere on a positive note and is also a prime opportunity to identify outcomes for additional learning or evaluative efforts to continue to build the evidence base on what works.

Facilitation Tools and Techniques:

- [After Action Review](#)
- [Popcorn Report Outs or Storytelling](#)

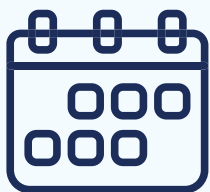


Reflective of What Didn't Work

It is important to create an open atmosphere and encourage the identification and articulation of what has not worked so that the team can properly adapt and develop mitigating strategies for challenges, as well as improve future strategic, programmatic, and/or operational investments.

Facilitation Tools and Techniques:

- [After Action Review](#)
- [Popcorn Report Outs or Storytelling](#)
- [Fail Fest Mapping](#)
- Portfolio Review or Roundtable Sharing



Context Analysis and Mitigation Planning

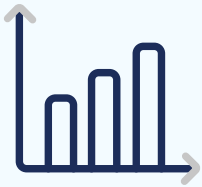
Pause & Reflect workshops, especially those held with regular frequency, are a key opportunity to consolidate context monitoring data and do more long-term and predictive analysis. This can be supported by pre-workshop ecosystem analysis, or done in a participatory manner focused on context implications currently affecting programming directly. It is always important to follow up context discussions by identifying ways your team can mitigate barriers and challenges and leverage enablers to protect and catalyze development outcomes (respectively).

Facilitation Tools and Techniques:

- [2x2 Scenario Matrices](#)
- [Popcorn Report Outs](#)
- Data Reviews and adaptive action identification

WHAT CORE SESSIONS SHOULD BE CONSIDERED WHEN BUILDING THE AGENDA? (CONT.)

Forecasting



Collaborative sessions offer an opportunity for forecasting emergent opportunities, priority shifts, procurement and MEL timelines, and other integration opportunities across teams and activities. Forecasting may not be necessary for every Triannual Pause & Reflect workshop, but are most useful when strategic planning prior to resource allocation or a new fiscal year.

Facilitation Tools and Techniques:

- Priorities Identification
- Popcorn brainstorming

Scenario Planning



Leveraging insights from Context Analysis and Forecasting sessions, Scenario Planning is an action-oriented way to determine multiple pathways for dealing with combinations of unknowns. This type of planning during Pause & Reflect workshops is essential for rapidly shifting/evolving contexts, expected changes, and theoretical experimentation of possible adaptation adoption behavior changes.

Facilitation Tools and Techniques:

- [2x2 Scenario Matrices](#)
- [Scenario Planning](#)
- [The Eight-Step Scenario Planning Process](#)
- [SWOT Analysis](#)
- Three Horizons Model

Workplanning



Integrating workplanning into Triannual Pause & Reflect sessions helps ground adaptations and builds an action plan for the upcoming year's strategy and/or implementation of adaptation. Collaborative workplanning helps with team ownership and sets the foundation for continued collaboration in workplan execution.

Facilitation Tools and Techniques:

- Team LOE Pie Charts
- Month-by-Month sticky note planning across the agenda
- Topline Priority Theory of Action planning

Team Building



Intentional time set aside to work collaboratively on strategy, activity adaptations, learning, and/or planning is also a great opportunity to integrate team building. Triannual Pause & Reflect workshops are particularly well-suited to expedite new team member onboarding. When there is time, adding in a team building exercise can encourage ownership and enthusiasm for the actions decided on during the workshop.

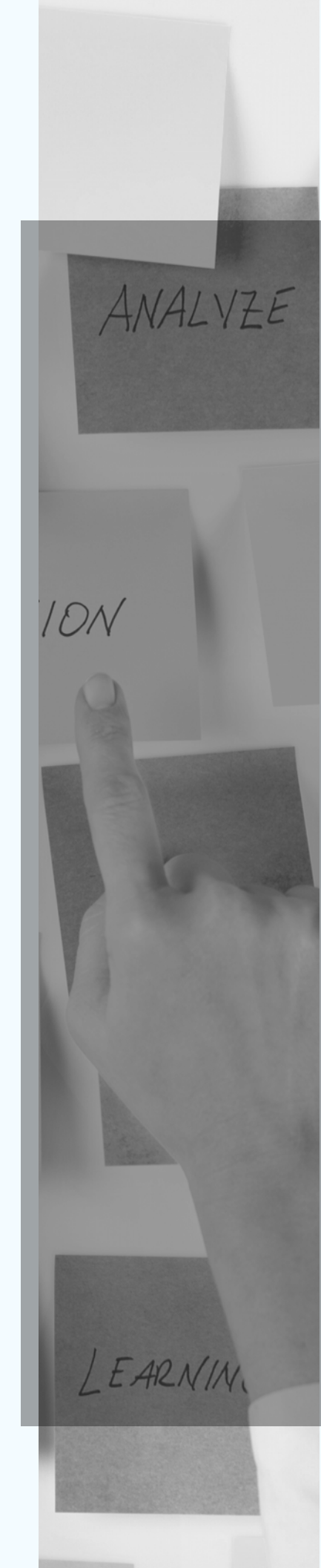
Facilitation Tools and Techniques:

- [CliftonStrengths](#)
- [Strictly Business/Ways of Working Team Profiles](#)

WHEN SHOULD WE HAVE A TRIANNUAL PAUSE & REFLECT WORKSHOP?

Pause & Reflect workshops do not need to occur on any specific timeline, frequency, or in response to specific situations. However, there are a few simple guidelines for determining when Pause & Reflect workshops might meet a need for you and your team:

- Hold Pause & Reflect workshops **before annual decision-making points** to consolidate learnings and ensure strategic application of evidence, improve contextual understanding, and incorporate cross-sectoral/complex insights. Decision and planning times typically happen on a regular annual schedule and it is ideal to set up recurring Pause & Reflect workshops at least one month before each of these core decision points.
- Hold Pause & Reflect workshops when there are significant contextual shifts, significant events or milestones in an activity or strategy, after a significant evidence gathering exercise, like a large summative evaluation, and when emergent learnings and monitoring data suggest something isn't working in an intervention as it should. While these types of Pause & Reflect sessions are oftentimes more ad hoc than regularly scheduled triannual meetings, they can be pivotal and timely feedback loops for adaptation when it is most needed and can have the most impact.
- Dedicate the appropriate amount of time and resources to having Pause & Reflect workshops. Brainstorming and reflection take time, especially if you want to translate identified learnings into action. Make sure you have sufficient time dedicated for each type of session and that you are ending the workshop with an action-oriented session so that everyone knows their next steps and how to implement learnings after the workshop is over.
- Schedule Pause & Reflect workshops when the most number of key stakeholders can participate, especially decision makers. Decision makers will enable you to finish the workshop with a clear action plan. And the more relevant stakeholders (your team, other team representatives who share work portfolios, other stakeholders, etc.) you can include, the more insights you can share and act upon. Make sure the participant list is designed around the type of conversations you want to have and inclusive of who you expect to need to implement adaptations based on learnings.



HOW CAN I MAKE WORKSHOPS PARTICIPATORY WHEN THEY NEED TO BE HELD VIRTUALLY?

There are a lot of toolkits, tips, and tricks for effective Triannual Pause & Reflect workshop facilitation. In general, these tools or facilitation methods are not specific to Pause & Reflect exercises, but part of good facilitation practice writ large. You can find various exercise examples and guidance in the [Facilitation Resources folder here](#).

However, in the current climate, oftentimes in-person facilitation and workshops are not possible. Below is a series of quick tips and various tools that are particularly useful when you have to hold workshops virtually for any reason.

Virtual Workshop Facilitation Tips:

- Break up the workshop into “digestible” sessions. Two to three hours are the maximum amount of time you can hold participants’ attention effectively in any one go, so oftentimes it is recommended to schedule two or three individual 2-hour sessions to cover all the core discussions and planning that is useful in a Triannual Pause & Reflect workshop. Make sure you schedule the different sessions close enough together to maintain momentum (such as every morning for three days in a row, or two sessions one day with a one hour break in the middle, etc.). It can also be helpful to orient each session around a theme, even if there are multiple exercises or conversations in each session. This facilitates participants coming to a particular session in a specific mindset and can lead to more productive and targeted conversations. This segmented approach also enables you to invite different groups to different segments of the workshop, facilitating variations of conversations or specific insights where they are most needed.
- Incorporate a variety of platforms that enable participation and active brainstorming, just like you were in person (see recommendations below). There are great online tools available with sticky note functions and various diagrams and templates to facilitate remote participation. Just make sure that you walk through access issues and any training needed for more complex platforms before the session. It is best to integrate a “technical setup/difficulties” session into a prior team meeting or send a comprehensive email with logistics information the week before the Pause & Reflect workshop to make sure everyone can join and engage effectively, and that technical issues do not take up valuable discussion time during the workshop.
- Additional guidance on facilitation remote workshops can be found [here from SessionLab](#). Additional guidance and resources are also available from Headlight via request.

VIRTUAL FACILITATION RESOURCES

For Video Conferencing

- [Google Meet/Hangouts](#)
- [BlueJeans](#) (*has breakout room capabilities)
- [Microsoft Teams](#)
- [Zoom](#)
- [GoToMeeting/GoToWebinar](#)
- [Skype](#)

For General Brainstorming

- [Google Slides](#)
- [Miro](#)
- [Padlet](#)
- [Mural](#)
- [Stormboard](#)

For Specific Facilitation Exercises

- [Miro](#)
- [Kumu](#) (Stakeholder Mapping)
- [Lucidchart](#)
- [Mural](#)

For Workplanning

- [Google Sheets](#)
- [Smartsheet](#)
- [Asana](#)
- [Basecamp](#)
- [Trello](#)

FOR MORE INFORMATION,
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