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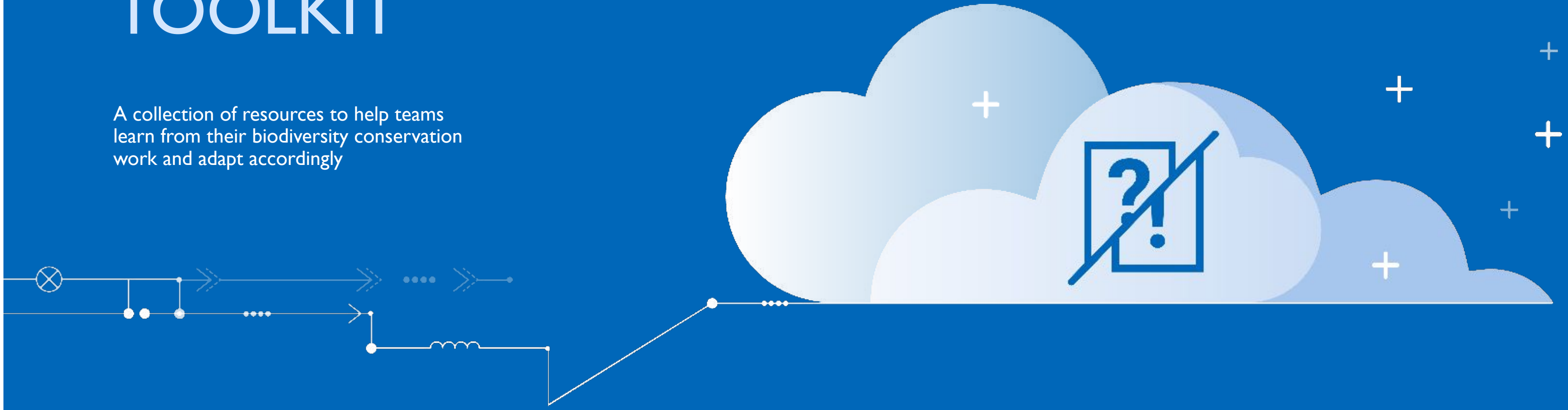
Pause & Reflect
TOOLKIT

A collection of resources to help teams learn from their biodiversity conservation work and adapt accordingly



CONTRACT INFORMATION

This program is made possible by the generous support of the American people through the U.S. Agency for International Development (USAID) under the terms of its requisition number REQ-EGEE-18-000127 (Measuring Impact II), implemented by prime recipient Environmental Incentives, LLC in partnership with Foundations of Success and ICF International, Inc. Measuring Impact II has been issued under contract number GS-00F-193DA Order No. 7200AA18M00013 and supports the same program objectives as described in RFQ number 7200AA18Q00020. Measuring Impact II is funded and managed by the USAID Biodiversity Division in the Bureau for Development, Democracy, and Innovation.

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DISCLAIMER

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.

Start Here

Pause and Reflect Design Worksheet

Use this worksheet to design the pause and reflect process that is right for you.

VIEW WORKSHEET

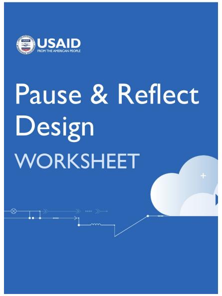
Pause and Reflect Toolkit

Once you know which pause and reflect activity is right for you, access templates and guidance in this toolkit.

Pause & Reflect Toolkit

NAVIGATION

Start Here



Design Worksheet

Decide which pause and reflect process is best for the context

VIEW WORKSHEET

Use this tool throughout the process

Adaptive Management Workbook

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

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

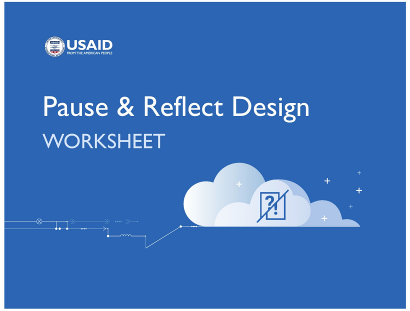
Pause & Reflect Toolkit

DESIGN WORKSHEET

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.



VIEW WORKSHEET

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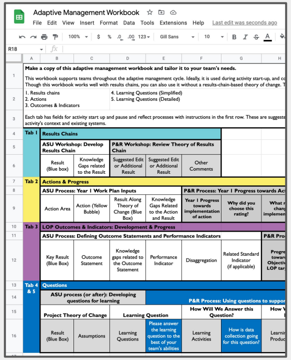
WORKBOOK

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.



VIEW WORKBOOK

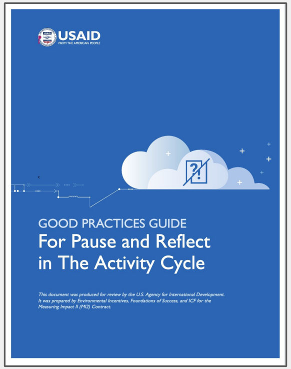
Pause & Reflect Toolkit

GOOD PRACTICES GUIDE

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.



VIEW GUIDE

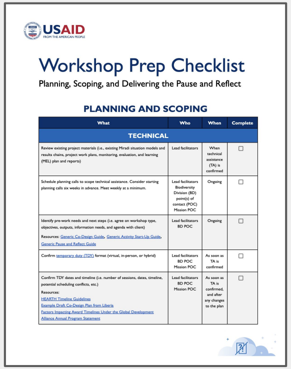
Pause & Reflect Toolkit

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.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Workshop Prep Checklist

Planning, Scoping, and Delivering the Pause and Reflect

PLANNING AND SCOPING

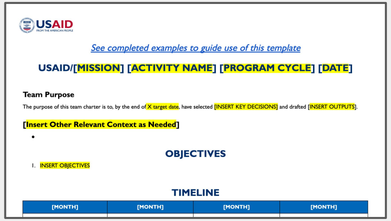
VIEW CHECKLIST

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.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See completed examples to guide use of this template

USAID/[MISSION] [ACTIVITY NAME] [PROGRAM CYCLE] [DATE]

Team Purpose

The purpose of this team charter is to, by the end of X target date, have selected [INSERT KEY DECISIONS] and drafted [INSERT OUTPUTS].

[Insert Other Relevant Context as Needed]

OBJECTIVES

1. INSERT OBJECTIVES

TIMELINE

[MONTH]	[MONTH]	[MONTH]	[MONTH]

VIEW TEMPLATE


USAID/Caribbean Development Program Project Design Workshop

USAID CDP Proposed Team Charter for CWT Activity Design

TEAM PURPOSE

By end of July[1], have selected an appropriate mechanism and drafted a Program Description/SOW, Independent Government Cost Estimate, and selection criteria[2] for a new CWT activity.

OBJECTIVES

1. Update problem analysis to specify biodiversity focal interests and key actors and drivers associated with threat of wildlife crime
2. Refine activity purpose, brainstorm and prioritize strategic approaches, and develop key results in consultation with mission leadership, other sector colleagues and USAID staff from other missions in the region
3. Identify and assess potential partnerships to inform activity design process and mechanism selection?
4. Consider mechanism and procurement process, identify key business process outputs and develop plan to incorporate best practices for adaptive management

VIEW EXAMPLES

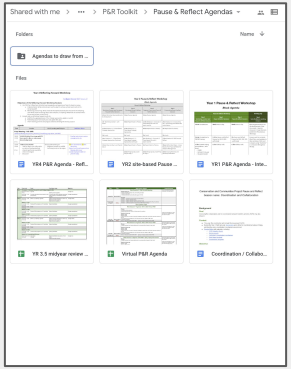
Pause & Reflect Toolkit

AGENDAS

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.



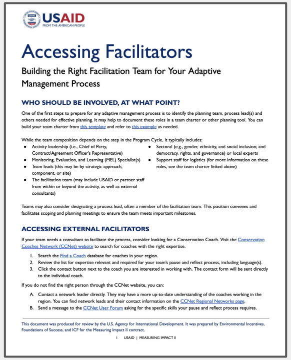
VIEW AGENDAS

ACCESSING FACILITATORS

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.



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Accessing Facilitators

Building the Right Facilitation Team for Your Adaptive Management Process

WHO SHOULD BE INVOLVED, AT WHAT POINT?

One of the first steps to prepare for any adaptive management process is to identify the planning team, process lead(s) and others needed for effective planning. It may help to document these roles in a team charter or other planning tool. You can build your team charter from this template and refer to this example as needed.

While the team composition depends on the step in the Program Cycle, it typically includes:

- Activity leadership (i.e., Chief of Party, Contract/Agreement Officer's Representative)
- Monitoring, Evaluation, and Learning (MEL) Specialist(s)
- Team leads (this may be by strategic approach, component, or site)
- The facilitation team (may include USAID or partner staff from within or beyond the activity, as well as external consultants)
- Sectoral (e.g., gender, ethnicity, and social inclusion; and democracy, rights, and governance) or local experts
- Support staff for logistics (for more information on these roles, see the team charter linked above)

Teams may also consider designating a process lead, often a member of the facilitation team. This position convenes and facilitates scoping and planning meetings to ensure the team meets important milestones.

ACCESSING EXTERNAL FACILITATORS

If your team needs a consultant to facilitate the process, consider looking for a Conservation Coach. Visit the Conservation Coaches Network (CCNet) website to search for coaches with the right expertise.

1. Search the Find a Coach database for coaches in your region.
2. Review the list for expertise relevant and required for your team's pause and reflect process, including language(s).
3. Click the contact button next to the coach you are interested in working with. The contact form will be sent directly to the individual coach.

If you do not find the right person through the CCNet website, you can:

A. Contact a network leader directly. They may have a more up-to-date understanding of the coaches working in the region. You can find network leads and their contact information on the CCNet Regional Networks page.
B. Send a message to the CCNet User Forum asking for the specific skills your pause and reflect process requires.

This document was produced for review by the U.S. Agency for International Development. It was prepared by Environmental Incentives, Foundations of Success, and ICF for the Measuring Impact II contract.

VIEW RESOURCE

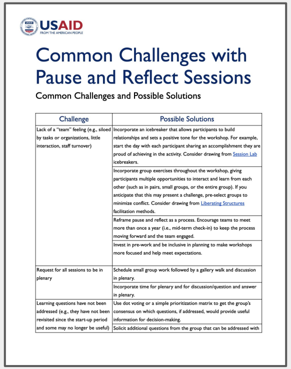
Pause & Reflect Toolkit

COMMON PROBLEMS

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.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Common Challenges with Pause and Reflect Sessions

Common Challenges and Possible Solutions

Challenge	Possible Solutions
Lack of a "team" feeling (e.g., siloed by tasks or organizations, little interaction, staff turnover)	Incorporate an icebreaker that allows participants to build relationships and sets a positive tone for the workshop. For example, start the day with each participant sharing an accomplishment they are proud of achieving in the activity. Consider drawing from Session Lab icebreakers.
	Incorporate group exercises throughout the workshop, giving participants multiple opportunities to interact and learn from each other (such as in pairs, small groups, or the entire group). If you anticipate that this may present a challenge, pre-select groups to minimize conflict. Consider drawing from Liberating Structures facilitation methods.
	Reframe pause and reflect as a process. Encourage teams to meet more than once a year (i.e., mid-term check-in) to keep the process moving forward and the team engaged.
	Invest in pre-work and be inclusive in planning to make workshops more focused and help meet expectations.
Request for all sessions to be in plenary	Schedule small group work followed by a gallery walk and discussion in plenary.
	Incorporate time for plenary and for discussion/question and answer in plenary.
Learning questions have not been addressed (e.g., they have not been revisited since the start-up period and some may no longer be useful)	Use dot voting or a simple prioritization matrix to get the group's consensus on which questions, if addressed, would provide useful information for decision-making.
	Solicit additional questions from the group that can be addressed with

VIEW RESOURCE

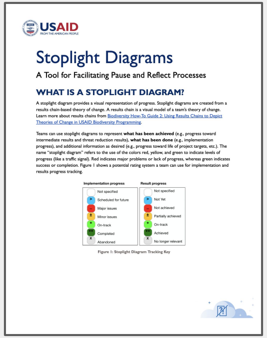
Pause & Reflect Toolkit

STOPLIGHT DIAGRAMS

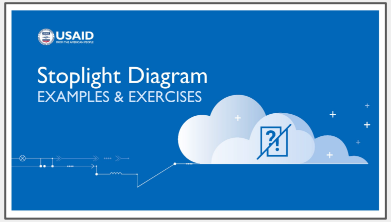
Teams that have used a results chain to depict their theory of change may consider creating a stoplight diagram as a tool for measuring progress in the pause and reflect process. While not required, stoplight diagrams can be helpful in documenting decisions, especially if those decisions are not being 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.



VIEW OVERVIEW



VIEW EXAMPLES

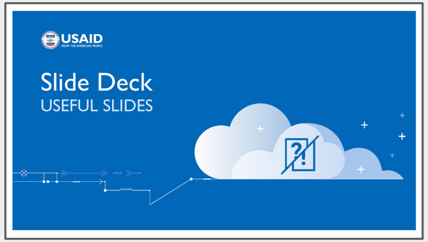
Pause & Reflect Toolkit

SLIDE DECK

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.



VIEW SLIDES

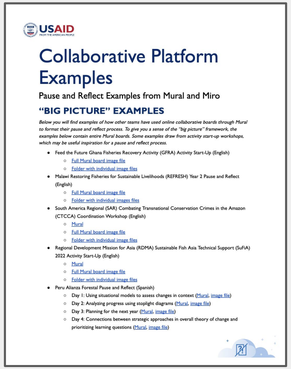
COLLABORATIVE PLATFORMS

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.



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Collaborative Platform Examples

Pause and Reflect Examples from Mural and Miro

"BIG PICTURE" EXAMPLES

Below you will find examples of how other teams have used online collaborative boards through Mural to format their pause and reflect process. To give you a sense of the "big picture" framework, the examples below contain entire Mural boards. Some examples draw from activity start-up workshops, which may be useful inspiration for a pause and reflect process.

- Feed the Future Ghana Fisheries Recovery Activity (GFRA) Activity Start-Up (English)
  - Full Mural board image file
  - Folder with individual image files
- Malawi Restoring Fisheries for Sustainable Livelihoods (REFRESH) Year 2 Pause and Reflect (English)
  - Full Mural board image file
  - Folder with individual images files
- South America Regional (SAR) Combating Transnational Conservation Crimes in the Amazon (CTCCA) Coordination Workshop (English)
  - Mural
  - Full Mural board image file
  - Folder with individual image files
- Regional Development Mission for Asia (RDMA) Sustainable Fish Asia Technical Support (SuFiA) 2022 Activity Start-Up (English)
  - Mural
  - Full Mural board image file
  - Folder with individual image files
- Peru Alianza Forestal Pause and Reflect (Spanish)
  - Day 1: Using situational models to assess changes in context (Mural, image file)
  - Day 2: Analyzing progress using stoplight diagrams (Mural, image file)
  - Day 3: Planning for the next year (Mural, image file)
  - Day 4: Connections between strategic approaches in overall theory of change and prioritizing learning questions (Mural, image file)

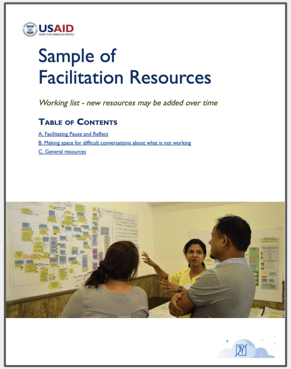
VIEW RESOURCE

FACILITATION RESOURCES

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.



VIEW RESOURCE

Pause & Reflect Toolkit

WORKSHOP REPORTS

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.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Madagascar Communities and Conservation Project
USAID Mikajy
USAID Hay Tao
Year 1 Pause and Reflect Workshop Report
August 5-21, 2019 - Madagascar
MI2: Ashleigh Baker (FOS), Shawn Peabody (EI), Landy Miary Andrianaivosoa (EI)
USAID: Olaf Zerbock (FAB), Kirstin Siex (AFR)

VIEW EXAMPLES

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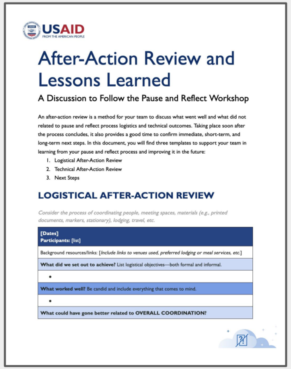
AFTER-ACTION REVIEW

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 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.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After-Action Review and Lessons Learned

A Discussion to Follow the Pause and Reflect Workshop

An after-action review is a method for your team to discuss what went well and what did not related to pause and reflect process logistics and technical outcomes. Taking place soon after the process concludes, it also provides a good time to confirm immediate, short-term, and long-term next steps. In this document, you will find three templates to support your team in learning from your pause and reflect process and improving it in the future:

1. Logistical After-Action Review
2. Technical After-Action Review
3. Next Steps

LOGISTICAL AFTER-ACTION REVIEW

Consider the process of coordinating people, meeting spaces, materials (e.g., printed documents, markers, stationary), lodging, travel, etc.

[Dates] **Participants:** [list]
Background resources/links: [*Include links to venues used, preferred lodging or meal services, etc.*]
What did we set out to achieve? List logistical objectives—both formal and informal.
•
What worked well? Be candid and include everything that comes to mind.
•
What could have gone better related to OVERALL COORDINATION?

VIEW TEMPLATE

ACRONYMS

BD	USAID Biodiversity Division
CLA	Collaborating, learning, and adapting
HEARTH	Health, Ecosystems, and Agriculture for Resilient, Thriving Societies
LOP	Life of project
MEL	Monitoring, evaluation, and learning
MI2	Measuring Impact II
P&R	Pause and reflect
SA	Strategic approach
SOW	Statement of work
TOC	Theory of change
USAID	U.S. Agency for International Development

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

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GLOSSARY

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.*

Pause & Reflect Toolkit

GLOSSARY

+/Δ ("Plus/Delta"): A list of positives (+) and things to change in the future (Δ); 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.*