WEBINAR TRANSCRIPT: COMPLEXITY AWARE MONITORING (CAM) WORKSHOP SERIES

SESSION 3: PAUSE AND REFLECT

Emily Stammer (00:00:03)

We have a full sort of action-packed agenda today with lots of exciting presentations. So I'd like to go ahead and get started. Next slide. As usual, I want to start with a little bit of housekeeping. Please stay on mute if you don't mind, unless you're speaking and keep your cameras off to preserve bandwidth during the main session. You can feel free to turn them back on during the breakout sessions, we'll be monitoring the chat box throughout, and prodding you all to engage using it. So please feel free to put thoughts and questions in there. We've set aside a few time points within the presentations and afterwards to answer questions, but if you put your questions in the chat as we go, we can try to answer them in there as well. We are recording the session. Recordings will be and have been made available on the MOMENTUM KM Hub. As always for folks who are external to the MOMENTUM suite of awards, we will share the materials after the workshop series is over. Next slide.

Emily Stammer (00:01:15)

I want to touch briefly on today's objectives. So the first two sessions in the series focused more on an introduction to CAM approaches as well as how to prepare to implement them. But today, and for the next two sessions, we're going to be focusing on specific approaches and really doing more of a deep dive into them. This week's approach is pause and reflect, and we thought it would be a good jumping off point into the world of CAM, given that it's one of the least resource intensive methods and can be implemented fairly easily. So today's objectives are really to introduce you all to pause and reflect, provide examples on how it's been used in similar projects. We're hoping to increase your understanding of how to adapt the approach for use within the MOMENTUM suite of awards, or in your projects for those who are external to MOMENTUM. We'd like to help you generate ideas for how to use pause and reflect in your projects. Next slide.

Emily Stammer (00:02:19)

As I mentioned earlier, we have a number of presenters today from both inside and outside the MOMENTUM suite of award. We have one change, unfortunately, Monalisa Salib, who was going to do the overview on pause and reflect has fallen ill, but we are so lucky that Dr. Laura Ahearn, who will be stepping in to do her presentation for her. Dr. Ahearn is a senior learning advisor with Social Impact, and she's currently conducting a developmental evaluation of the implementation of USAID Digital Strategy, so we're very lucky to have her with us. We also have Farhad Khan and Karen Levin with MSSFPO. Alicia

Hurlburt, and Deb Sitrin with MCGL, and Devyn Bell with MKA, and Jessica Shearer with MRITE. We've really got a representation from across most of the awards.

Next slide. So I just want to give a brief overview of kind of where we're going in through the session today. We'll start today with an introduction to pause and reflect with Dr. Laura Ahearn, and then go right into the round robin session with short, yet informative presentations by a number of your colleagues from within the MOMENTUM suite of awards. We'll take a short break after the first two presenters from MSSFPO, and then finish up with three presenters from MKA, not Aka, then MCGL. After the round Robin presentations, we'll do a quick breakout discussion focused on pause and reflect. We'll finish up today with a presentation from Jessica Shearer, from MRITE on root cause analysis.

Emily Stammer (00:03:57)

Given that Monalisa will not be presenting today, Dr. Ahearn is pinch hitting for her, but please we will make the presentations available afterwards, if you have questions and you can feel free to reach out. But yeah, the recordings and everything will be available and Monalisa's slides will be available in case anybody has any questions afterwards. We may kind of do more of a surface hit on a lot of these things. So without further ado, I'd like to introduce Dr. Laura Ahearn, and she's going to give us an introduction to pause and reflect.

Laura Ahearn (00:04:41)

Great, thanks so much, Emily, and good morning, or good afternoon, good evening to everybody. It is really nice to be with you all Monalisa is very sorry that she can't be here, she is not feeling well today. So I am going to pinch hit for her as they say in baseball. So pause and reflect, this is an approach... it's really almost a mindset and a set of practices that range from extremely informal and extremely short to very formal and organized and long lasting. So I'm going to go through a few examples and just overarching principles for pause and reflect. Then you'll hear from all of the other presenters, as they tell you more about their specific experiences. Next slide please.

Laura Ahearn (00:05:39)

If you have any questions, please put them in the chat, I'll do my best to keep an eye on what is going on in the chat. Okay. So bottom line, what does it mean to pause and reflect? First of all, you have to have something to reflect upon. So you need a source of information that can be anything from a very, maybe a formal research study, or an evaluation, some data. All the way to just having had an experience or a wanting to step back and think about what you've been doing. Very informal to very formal. You need to then say, "I need to make sense of this, or we need to make sense of it." It can be an individual, or it can be a group activity. Then that's still not yet enough. It's not enough to just have something data, information, experience that you want to reflect upon. Then to reflect upon it, you need to decide what you should do about it. Sometimes what you decide to do is not make any changes, that's okay.

Laura Ahearn (00:06:46)

But other times you need to make a change, you need to adapt. This is part of adaptive management. If you were looking at the project and it's just not working well, or it is working well, you need to make a decision and act accordingly. Then you need to follow through on the decisions that are made about what the next steps are. I will say that this sometimes is the hardest part. I will say from personal experience, it's hard to both go back and make sure that the pause and reflect sessions, whether formal or informal have resulted in the actions that were supposed to happen. It's hard to kind of keep track of that because you do want to keep track of what you do as you go along. Next slide please.

Laura Ahearn (00:07:30)

So where are we taking this idea of positive reflect from? This is the overall Collaborating, Learning, Adapting framework. Maybe it's familiar to you, maybe you've never seen it before, this rainbow circle. In case, it's new or in case you want to know more, you can look on USAID's Learning Lab website. It's a publicly available website full of very useful tools, information, research, data, et cetera. As part of this framework, you see pause and reflect is, that in that green wedge there. It is one of the 16 sub components of the overall CLA framework. So there's a lot of different ways to go about it. I'm going to just go through some of those next. Okay, next slide, please. Along with the framework, the CLA framework, there's a process. If you go through the CLA self-assessment and action planning process. There's a process by which either an individual or a group, ideally, a group can self-assess their maturity or where they are on a spectrum... the Maturity Spectrum we call it, along each of those or any number, any one of those sub-components.

Laura Ahearn (00:08:56)

So here is the Maturity Spectrum for pause and reflect. I'm not going to read through each one, I think you'll be coming back to this later on in the session today. But you can see that the individual or group might assess themselves as being on... let's say pause and reflect as being not yet present, you don't do it yet. To emergent, it's just beginning, maybe you only do it in formal sessions, or when it's required. To expanding, you have other opportunities to take advantage of formal and informal opportunities to pause and reflect. Advanced, is when you have a variety of pause and reflect activities, and then you actually take action as a result of them. Then institutionalized at the far right end of the spectrum, is when pause and reflect is built right into your everyday practices of your team and of you individually. So this is a spectrum we'll come back to later on today.

Laura Ahearn (00:10:00)

Next, please. Now, as I said, at the beginning, there's a variety of approaches. When you're an individual, you can build positive, reflect into your every day activities, formal or informal. You can blog, you can use writing, whether it's to publish and share with others, or just in a journal, or a notebook. You can have a coach. There are amazing coaches that help with these sorts of processes to improve your productivity and effectiveness. If you're a group, a pause or reflect can be anything from something you do formally as part of, let's say a portfolio review or quarterly review, where you're reviewing your monitoring data, let's say. Or maybe on an annual basis when you look at the overall big picture of your activity, and you want to set some goals for the next year, you want to maybe make adjustments to various milestones, you've set for yourself longer term.

Laura Ahearn (00:11:06)

Or shorter term, it can be very quick. I think the military uses this term, hotwash. It's an immediate after action review, like right as soon as you finish an event, or a process, or a time period. You immediately say, "Okay, how did it go? What did we set out to do? What did we actually do? What worked, what didn't, and what needs to change?" Next slide, please.

Laura Ahearn (00:11:34)

Why is this so important? This is something important to reflect upon because pause and reflect isn't something we do just because it's fun, although it often is. Or that it's enlightening, which of course it often is. But there is evidence from a lot of different sources that pausing and reflecting actually helps to make work more effective, make people more productive in their work. So I encourage you to take a look again in the Learning Lab, during the LEARN contract, which Monalisa and I were on. It was a five-year contract to support PPL, the bureau for Policy Planning and Learning in USAID, help them institute Collaborating, Learning, Adapting across USAID. We gathered the evidence and there's an evidence dashboard there. So again, it's a treasure trove. I really encourage you to go to Learning Lab. Next slide, please. Now we're going to hear from, just a couple of minutes, a minute or two from a professor who tells us a little bit about the evidence for pausing and reflecting. If we'll play the video. Thanks.

Prof. Giada Di Stefano (00:12:56)

We went into a company and look at employees that were going through a training program over a period of 30 days. We asked to some of these employees to just keep on doing what the usual training program was about, without any intervention on our part. Then we asked to some other employees to take the last

15 minutes of their working day to stop and think writing down on a diary, the main lessons that they learned that learned during that day. At the end, all the employees went through a test that was meant to assess how much they learn during the training process. Employees who took the last 15 minutes of their day writing down the main lessons learned and reflecting upon the learning, performed 23% better than those who spent the last 15 minutes of their day working.

Prof. Giada Di Stefano (00:13:47)

We actually find that the reason why people perform better when they think about what they're learning is at least in part, because afterwards they feel more competent, more confident about what they were doing. So the fact that you actually take some time and put some time aside in order to think about what you're doing, enables you to feel more confident about your capability of performing in that task. These in part explains why in the end, you end up performing better in that particular task.

Laura Ahearn (00:14:25)

Great. So this is in reference to individual pausing and reflecting, which I highly recommend. Whether it's at the end of your day, at the beginning of your day, maybe the middle of your day, or maybe after a certain period of time or at the beginning of your week, at the end of your week probably many of you do this already, but it more intentional, and more regular is very beneficial. Next slide please.

Laura Ahearn (00:15:04)

So there in addition to the evidence that professors, and researchers, and practitioners have gathered, we took all of that and did a meta analysis. We, meaning on the LEARN contract back a couple of years ago. Again, it's on the Learning Lab website. I don't know how many of you are familiar with the collaborating, learning and adapting case competition that happens every year. USAID PPL the bureau for policy planning and learning asks, implementing partners, as well as USAID operating units to submit cases of good examples of Collaborating, Learning, and Adapting every year. Then there's a competition and there's a bunch of finalists that are listed, et cetera.

Laura Ahearn (00:15:55)

So one of the activities we did on the learn contract was to analyze all of the several years worth of submissions to that competition, to see what those examples had in common and to see if we could find patterns. One pattern we did find was that pausing and reflecting was identified as a really important component in improving organizational effectiveness. So that again is at the individual level, or at or on team, or organization level. Next slide.

Laura Ahearn (00:16:39)

On Learning Lab, all of the recent years of cases can be found and there's a really helpful, wonderful, interactive map. You can browse the cases, you can do it by sector. You can say, "Oh, I want to know for Nepal, what has happened in Nepal? What cases have been submitted from Nepal?" You can do it by sector, global health, or DRG or whatever. So very useful, inspiring examples. So that's on Learning Lab as well. All of these links, as Emily said at the beginning, and this whole slide deck will be sent to you. I see some of the links already in the chat, so these are really great resources. Next slide, please.

Laura Ahearn (00:17:32)

Um, here's another kind of way to visually represent the journey. Bottom line, what this illustration emphasizes and what I would emphasize just as a kind of a takeaway from all of this, is why do we pause and reflect? Because we want to get to the point where we can actually use evidence and make changes so we have evidence-based, decision-making, we have evidence-based adaptive management. Now what counts as evidence, we define evidence very broadly. So again, it can be something like a formal research study or an evaluation, I mean, monitoring data. But it can also be experiential. You want to bring all of your team members in for a day or a half day of reflecting, and thinking about what they've been doing, and how they've been experiencing the program, and what challenges they... That's also a pause and reflect. There's a lot of different ways to facilitate, to really make it effective.

Laura Ahearn (00:18:44)

I will say on that front that we, of course face more challenges in doing this in the remote environment. I'll give you one example from my current position as I'm helping... I conducted developmental evaluation, which basically means I am a learning advisor to the technology division within USAID. I'm trying to help them learn and adapt as they implement the new USAID digital strategy. So there are 16 teams as part of the overall digital strategy. When I started last year, I noticed that they're very siloed. It's very common in organizations that teams or offices, they work very separately. So I came up with this idea to encourage more communication collaboration, and I called it Connect and Reflect, although it was basically a pause and reflect a session. We do it every Friday for just 30 minutes.

Laura Ahearn (00:19:51)

The leads for the 16 teams come together, and every week in the remote environment we have a session where it starts with five to eight or nine minutes, one of the leads presents something. No advanced preparation required, it's something that's happened recently. Or we do a peer assist where the person needs some help with a challenge, or we do something that we share, like "I need your input on." Or "How can you all, how do your initiatives intersect with this thing that my initiative is doing?"

Laura Ahearn (00:20:29)

So that's the first like eight minutes let's say. Then the next 10 to 15 minutes is a silent writing period using Jam board, usually. Although we've experimented with some other virtual whiteboards, like MURAL, or Miro. There are questions there and people, write. We've found that in the remote environment, getting people to write first, think first individually, makes them more likely to be willing to speak afterwards.

Laura Ahearn (00:20:59)

So after the writing the person who's leading the particular session, reconvenes the group and ask for any comments, or maybe it depends on the topic. But we've found this to be extremely effective and very popular. Sometimes it's used by the overall strategy lead to do more overarching things and sometimes again, it focuses on just one initiative or one topic, one component. There's many different ways to do pause and reflect, so I want to emphasize that, but all of them get to this... or ideally get to this final point of using something that you've learned that you've reflected upon to inform a decision or an action. I will say that is something we've been challenged by in the connect and reflect that we've had all of these sessions now for months. This Friday in fact, we're going to be pausing and reflecting on how we can pause or reflect better. Especially, in how to follow up and make sure that the decisions that we make are followed through on that, any actions that seem to come out of the session are actually taken.

Laura Ahearn (00:22:19)

Okay. Next slide. So again, these are some do's and don'ts, I'm not going to read through here, but I think that we can probably, you probably can tell by now what I've been saying, there are some things that you really don't want to do. Maybe they're obvious, but I'll just point out one or two of them. What you don't want a pause and reflect session to do, or to let it revert to... Because sometimes it's just really easy, especially in the remote environment to kind of fall back on maybe a single voice presentations. Or allowing one or two voices to dominate, and then have that not really be tied to anything you need to decide or change, or do, or adapt later on. Not following up as I said, it's a challenge to make sure you are following up on decisions or actions.

Laura Ahearn (00:23:20)

Most of all, I think that pause and reflect whether it's at the individual level, you yourselves as practitioners, as professionals making time in your day or your week, or your kind of seasonal cycle to pause and reflect. Or as a team, as an organization, it needs to be intentional. Yeah of course, all of us occasionally reflect on we're doing, the idea of pause and reflect is that you make it intentional. You make sure it's resourced, if it's organization-wide or team-wide that you make time for it. It can feel like, "Wait a minute. I'm not working." Or "We're not working. We're taking half a day. Oh my gosh, that's a lot of time. We could be doing something else."

Laura Ahearn (00:24:04)

Well, as the professor noted, and as we have found in research, it makes so much difference. If you can make the time and make sure you follow through to have pause and reflect, be as effective as possible. Okay. Next slide. So the final point I want to make here is that doing pause and reflect is a way it requires a certain set of skills that may not be in your skillset right now. Or it may be something that you've done, but not as often. So in addition to having some data or experience that you are going to reflect upon, you need to have somebody facilitate well and intentionally that session, so that the reflection upon the data or upon the experiences really does result in the informed decision or the change in practice that you want. So you need good communicators. The visual here is from my former colleague Kat How, Catherine How,. I give her a lot of credit. She's a wonderful artist, as well as a really super thinker. She was also on the Learn contract. So data visualization and visual note taking all of those can be skills that are put to use for pause and reflect sessions. And then most of all, you need to have people who are willing to do the reflection. You all are here. So you all are obviously already willing, but some of your colleagues may not be as prepared. So I encourage you to talk to them about the benefits and share with them the evidence, and also talk with them, get them engaged in thinking about, for your particular team or, or purpose or, or activity, what would be the best way to pause and reflect.

Laura Ahearn (00:26:06)

So I think I'm going to end it there. I will take a look at the chat and see if there's any immediate questions and if not, turn it back. Let me see here. We all face challenges. I'm just reacting to Jessica Schumer's comment. We all face challenges. And I think we have to be honest about that. And we're all figuring out things as we go along. Right? And one of the things that I think can make people a little bit uncomfortable about pausing and reflecting is that there aren't often obvious right answers. We have to be comfortable with a little bit of ambiguity, a little bit of uncertainty, and hopefully the pausing and reflecting helps us reduce that uncertainty to imagine manageable levels.

Laura Ahearn (00:26:57)

And so then I'm reading Lara Vaz's comment here, wondering how complexity, where monitoring series, such as this one can better reach program managers and technical advisors. This is something I'm going to turn back to you all and also turn this back to Emily and others to discuss, because I think that's a great question. And I think the rest of the session will be an opportunity to address it.

Emily Stammer (00:27:27)

Yeah, that's great. Thank you, Laura. Laura, do you want to come off mute and talk about this a little bit more? Do you want to have a discussion about this at all? We've got a few minutes here or we can do it later.

Lara Vaz (00:27:42)

Yeah I can come of mute. Just for a second, we have a Laura and a Lara on. But I recognize that often times CAM and monitoring in general winds up being seen or perceived as the responsibility of male staff and more and more, I feel that our program managers and technical advisors need to not just participate but own these processes because the actions that come off of a pause and reflect are carried out by them and are lost. Right? And so I think we ought to be thinking about what is, I'm putting myself right now in the role at an M&E person and thinking as a male staff person, what is my role in a pause and reflect, but also what is the role of the other members of our teams in pause and reflect and how do we pass that role or share that role or share this vision with others?

Lara Vaz (00:29:04)

I know Jim Ricca is working a lot on this throughout MCGL and you may want to come on from you. But I just think that that's an overall pause and reflect for us who are, and I was just taking a quick look, I think predominantly male staff, but some KM staff from my recollection. I think that's important for us to think about. Over.

Laura Ahearn(00:29:28)

That's a great point and anybody who wants to come off mute at this point, I encourage you to do so because I don't have any immediate, obvious answers. It's just one thing that we all have to deal with. I would say, sharing with your technical colleagues, any of the evidence perhaps, or examples of when pausing and reflecting has really benefited an activity and that there's plenty of really useful evidence and examples on learning lab, you could perhaps share with them. And I think we used to have this saying that CLA breeds CLA like, if you can start small and get people to do a little bit often they'll see that it's really helpful and then you introduce a little bit more and introduce a little bit more. And it does also really help to have leadership on board. So maybe others have other ideas, but I encourage you to continue to think and grapple with this because it's a great question and an issue that is important to consider. I see Jim's hand up.

Jim Ricca (00:30:56)

Hi, thanks. This has been a really great presentation Laura and it's great to see the resources that you pointed out in terms of the case competitions and that video is great too. I really like that. As Lara mentioned on MOMENTUM Country and Global Leadership, we are kind of trying to curate a few things that we're putting into what we call a tool kit, kind of like a basic toolkit and maybe kind of being a little more prescriptive and directive for people as they kind of get started. Not saying this is the way to do it, but this is a possible way to do things. If you're, especially for those who don't have a lot of experience with either pause and reflect or just CLA in general.

Jim Ricca (00:31:44)

And I will throw this out there. I know it's a different mechanism, but I see it as it gets put in a different category. But I see as very related to pause and reflect after action review. I see after action review is the thin end of the ledge. So to speak.

Laura Ahearn (00:31:58)

Yeah.

Jim Ricca (00:31:59)

It's an easy thing to do. You do it at a discreet event. You don't kind of have to ask somebody to meditate at the end of the day or something like that, or do something unusual. It's like you now did this really important thing, work planning, whatever, what have you, let's just debrief afterwards, you know? And for God's sake the military could figure out how to do it. Even when people are in the field in mortal danger.

Laura Ahearn (00:32:26)

They do it. Yeah. It helps.

Jim Ricca (00:32:27)

If they could other people can at least do that. And I think if people could start doing that, they could start seeing, "Hey, maybe there are other times when we need to be doing similar sort of things."

Laura Ahearn (00:32:35)

Yeah. Great, great point. After action views are definitely a type of pause and reflecting. And they don't have to be, as you said, too out there. They're generally pretty practical. And especially if you can make them as soon as possible afterwards, whatever the event was and then document and follow through, and you've just done an example. And then if that works you, as you said, it's kind of like get in there and you say, "This worked. How about next time we do it before action review. Let's try to pause and reflect and see what might happen or what we could avoid. And let's go back and look at our notes from the last after action review of a similar event and learn from that and not do it this time." Or whatever, but yeah, absolutely. That is for sure, a good wedge, a good entry point, as we say. Any other comments or questions or thoughts.

Laura Ahearn (00:33:40)

I'm going to put in the chat once I stopped talking, because I can't talk and think and do at the same time, a link to another resource, a blog that's on Learning Lab. There's a lot of blogs also with really good examples on Learning Lab, as well as all those case studies that I mentioned before. But this blog is the evidence for evidence use. Like what causes, what does the evidence show about what makes it more likely that evidence will actually be used to make the necessary changes for adaptive management? And there's a blog post, but it's a blog that summarizes an entire study, like a lit review of all of the research, formal research, done on what makes people want to use evidence. And you probably all could guess, but maybe I'll just give you the bottom line is as I kind of my takeaway from the whole study and the blog, which is wonderful, Mona Lisa, who would have been your presenter today, coauthored it with another colleague of ours.

Laura Ahearn (00:34:49)

Bottom line is you need to get people involved from the beginning, as much as possible, of an evidence gathering process in order to get them to be interested in the evidence that's generated. So, for example, if you're going to be, let's say reflecting on some monitoring data or reflecting on an event that was facilitated, if people who are going to be doing the reflecting have had some say, they feel some ownership, they had buy-in in the event or process or document or whatever it is, the activity they're much more likely to be interested in the evidence that is generated. And then since they're interested, they're more likely to use it. So the evidence for evidence use. The other insight that comes out of that, and I'm an anthropologist so this hit close to home, is that evidence it's all a social process and knowledge management, knowledge sharing it goes through social networks as much as professional networks than anything else. So I'll put the link to the blog, which itself has a link to the lit review in the chat momentarily.

Emily Stammer (00:36:13)

Okay. Great. All right. I think we are going to move on. Thank you so much, Dr. Ahearn. I really appreciate your stepping in. This has been really informative. I love how everything is evidence-based we all need that. So really, really appreciate taking the time.

Laura Ahearn (00:36:33)

Thanks everybody.

Emily Stammer (00:36:35)

Yeah. So now we're going to transition into the round robin section of the session. We have five presenters from three different awards who have agreed to present on how they've used pause and reflect and adapted it for their momentum awards, but also externally with other projects. Their presentations will be about five minutes long with a minute after for questions, and then they can also answer questions in the chat as they go if you think of things after the fact. So we'll go ahead and start now, I'll turn it over to Karen Levin who's the Merle director with the Momentum Safe Surgeries project who will talk about data for decision-making reviews as part of the Fistula Care Plus project. Karen.

Karen Levin (00:37:22)

Great, thanks so much, Emily. And I have to say that Lara, your question and the ensuing discussion couldn't have been a better lead in to my presentation because that is exactly what I'm going to be talking about. So I want to talk a little bit about an approach that we used under Fistula Care Plus that we call Data for Decision-Making Reviews or DDMs. And these came out of a expressed need slash desire from global program management and technical staff to have a way to come together regularly discuss the most recent project data and ensure that everyone across the project and team were up to date and sharing the same sort of overview picture of how things were progressing across the project. So these DDMs included everyone, they included program management, technical advisors, clinical staff, finance staff, the entire sort of global team.

Karen Levin (00:38:16)

Initially we developed a standard template that we used... Oh, sorry, Sammy, you can go to the next slide. Thanks. Initially, we developed a standard template that we used for the global management reviews and we conducted those quarterly. Ultimately the process was found to be so useful and sort of rewarding for people the country teams then adapted and customized their own templates for use within their own team management reviews at the country level, which were usually done monthly, sometimes quarterly. And then we also use them with partner facilities that we were working with. And that usually took place anywhere from one to four times a year. And also with things like provider networks or technical working group meetings, which was usually more on a semi-annual or annual basis.

Karen Levin (00:39:01)

And so there's a little visualization here of sort of the circular process, but a new slide set and the action steps from the previous meeting would be shared one week prior to each review to give the participants time to familiarize themselves with the content and be prepared to report back on action items that might have been assigned to them previously. And then each review would begin with an update on the action items from the previous review. And then there would be a presentation of data visualizations and discussion analysis where participants could provide contextual details to the data and identify areas of potential concern, areas to watch going forward or areas that required immediate programmatic followup from the team. And so for each identified area, there would be clear action steps, timelines, and responsible parties identified and documented and then the full slide set and the accompany notes and the action plans would be distributed within three days following the meeting.

Karen Levin (00:39:57)

Next slide, please Sammy. Thanks. So these DDMs were heavily focused on using data visualization to communicate information and spark discussion. So I've included on this slide and the next slide, just some examples of the template slides with the slides that were used at different times. The global management review template included scorecards related to reporting in and of itself. For instance, whether specific reporting components were being completed, whether they were being submitted in a timely way, things like that, as well as data visualizations that showed the current quarter or year to date data in relation to project benchmarks. So both globally and by country of implementation. And this would allow for sort of contextual discussions on the challenges that were going on in specific countries or with specific areas of activity talking also about things that were planned, things that were coming up and developing action items to act on any areas of particular note, both successes and challenges.

Karen Levin (00:40:56)

And while we had a core standard template that was used for each DDM, we also were open to sort of adding things based on express interest from participants. If people had specific questions that maybe came up the next time we would maybe prepare a slide or two that sort of was a deep dive into the content that people were interested in.

Karen Levin (00:41:17)

Next slide please. So the reviews also provided an opportunity to present multiple facets of routine data that was collected in the project to give a more nuanced and complete picture. So for us, since we were conducting surgical repairs for Fistula, we could sort of put together different components of the routine data that we were collecting. So to get a more complete picture of patient profiles or surgical outcomes in different countries or facilities and identify emerging trends, for instance, rising iatrogenic rates in the countries that we were working in. So all the data was broken down at the facility level in the notes of the slides. So even though the presentation generally was at the global or the country level, we did have facility specific information in the notes so you could drill down during the discussion as relevant.

Karen Levin (00:42:03)

So I wanted to just touch on a couple of valuable sort of lessons learned for us through this process. So we had developed a pretty robust DHIS2 instance for Fistula Care Plus that had customized dashboards for different country teams for different audiences, but we really had difficulty habitualizing its use outside of the core M&E teams globally and at the country level. And this wound up being more of an alternative to the use of those dashboards rather than a complimentary review. And in retrospect, it would have been really good to tie these DDMs directly to the dashboards. For instance, having participants log into the DHIS2 and follow along or discuss the actual dashboard visualizations that were on there as a way of sort of habitualizing use and helping people feel more comfortable accessing that resource and using it more regularly.

Karen Levin (00:42:58)

In addition, as Laura noted earlier, the follow-up and accountability piece of the reviews was crucial. Initially we had just had general notes from the review that we shared back along with the slide set. And then we realized that we needed more specific measures to ensure that people were actually carrying through with the identified actions and reporting back to the group and keeping that conversation going. So we did develop a specific template for action items, identified parties and timeframes. And as I said earlier, we shared that right after the review and then we re-shared it a week prior to the next review so that people would become prepared to report back.

Karen Levin (00:43:33)

And finally, I just wanted to say, we were really pleasantly surprised at how much staff enjoyed being part of this discussion. A lot of people reflected that this was like sort of the best part of their quarter and that there were really very few opportunities in our routine work to discuss a sort of holistic overview of progress and challenges within the project. And that this kind of check-in helped people feel much more connected both to each other and to our work. And it also established a routine management mechanism that allowed us to stay on top of trends and establish clear accountability for programmatic action and response. And that's it for me. If anyone has any immediate questions, I'm happy to answer them. Otherwise I can answer in the chat and hand over to Farhad.

Farhad Khan (00:44:32)

Hi everyone. My name is Farhad Khan. Can... Yes. Thank you. So I'm going to be talking about using pause and reflect for program reviews and specifically for answering evaluation or learning questions. And I too, with Karen am on the Momentum Safe Surgery and Family Planning and Obstetrics award.

Farhad Khan (00:44:49)

Next slide please. So this is all under a USAID-supported nutrition program in Ethiopia, which is implemented in four regions. The program review activity was within a midterm process evaluation, which occurred at the end of year three and we wanted to learn from the implementation a key interventions so SBC, WASH, QI, social protection and identify opportunities for adaptation. And we tried to do this by answering specific questions. So for example, to what extent have private sector partners adopted and sold WASH products our enhanced community conversations, which was the projects SBC approach associated with key behavioral outcomes. To what extent has the project made progress towards its targets? And so the process involved a literature review and secondary data analysis and key informant interviews with project technical leads and consultative meetings at the woreda level.

Farhad Khan (00:45:48)

The literature review and the key informant interviews took about a month and a half to do in parallel. We were working with the project team to find a time to hold the consultative meetings. And the meetings themselves took two weeks. We aim to triangulate as much information as possible between the data sources, but the consultative meetings are also opportunities to fill in gaps that we identified from reviewing the literature and through interviews with the project staff. There were a total of around seven consultative meetings in the four intervention regions. 10 woredas were represented in total and the meetings lasted two days.

Farhad Khan (00:46:27)

Yes. So for the consultative meetings, they're kind of like focus group discussions, moderators were senior project staff. They followed a facilitator guide with questions and a note taker followed and took notes. In each meeting, there were around 20 to 25 participants split into two meeting rooms and splitting participants made them discussions more manageable, like a focus group discussion, but it helped us divide and conquer the questions we wanted to answer as well.

Farhad Khan (00:46:54)

And so because of this, each team required two facilitators and two note takers and so four people. The meetings took around a week and a half. The first week, we piloted the approach in one meeting in Amhara with an extended team and the second team, the second week, excuse me, we split the team into three teams. So that was four members each to cover the remaining regions. And so through this piloting approach, we realized we didn't have time to do some of the activities. And so for example, we couldn't report back from breakout rooms, every breakout room. And so we adapted.

Farhad Khan (00:47:29)

Piloting was also important because these facilitators managing the meetings in the second week, like after we split up, they had the opportunity to observe the pilot meetings before running them themselves. And the participants included health extension workers, health facility worker, sales agents for wash products, woreda health staff, woreda agriculture staff, woreda water staff, woreda leadership, PSNP representatives, the social protection program, community change agents. So these are the community SPC volunteers. But importantly, no direct beneficiaries were included in and this was a limitation. And we worked with the project team to identify which stakeholders were needed to address the questions we were trying to answer. The project team then contacted the regional offices to organize the invitation. So it was a very collaborative process.

Farhad Khan (00:48:22)

Next slide please. So for lessons learned the benefit of the consultative meetings is they kind of provided a rough approximation of ground truth and this worked well for some of our questions. So for example, the consultative meetings are great for questions on SBC being associated with key behavioral outcomes, because the frontline workers providing the SBC to the community were in the meeting, giving their feedback. But there are also limits and specifically it would be difficult to use this specific method for questions targeted to program beneficiaries. And so, for example, if I wanted to know the extent to which a project installed water point was being used for multiple purposes like drinking or farming, these meetings do not provide a reliable way to answer that question because that question would probably require interviews with beneficiaries or direct observations.

Farhad Khan (00:49:17)

Another thing is that we had a diverse set of stakeholders, which was valuable for complexity, aware monitoring, and theory, because these different perspectives may help you render a more complete picture of your complexity or give you a more complete answer to your question. But as you know, for focus group discussions, there are also power dynamics that the facilitator needs to be mindful of. Having senior leadership facilitate the meetings was also kind of very important because they were in charge of executing any adaptations that might've come through the meetings that are fairly invested. And it took two to three months to write the final reports, because there were a lot of notes to analyze specifically, because we had asked a lot of questions and this kind of had an evaluation type flavor to it. And to conclude on opportunities, if I were to do this with the momentum suite, I would consider building in pause and reflect events over the life of the project, make them low dose high frequency and that strategic points. And instead of trying to answer many questions in one pause and reflect session, focus on one intervention per pause and reflect, have fewer, but more relevant stakeholders involved, including the relevant technical advisors and perhaps try to build them into regular field monitoring visits with, as I said, technical leads facilitating. And so that's it for me. Thank you.

Emily Stammer (00:50:48)

Great. Thank you, Farhad. Does anybody have any quick questions for Farhad? Or you can feel free to put them in the chat and he can respond to them that way. If not, I think thank you, Farhad And thank you, Karen. I think we are going to go ahead and ... Let's see. Jim has a question for you, Farhad about how many times did you do this?

Farhad Khan (00:51:21)

Yeah, so it was just one time and it was a midterm evaluation. So it one specific event at the end of year three. And we had all of these meetings within a two week period.

Emily Stammer (00:51:42)

Great. Okay. Lara, you've got your hand up?

Lara Vaz (00:51:49)

This is Lara. Yeah, just also, I think it took a couple of weeks to actually carry out, but my recollection is actually took months to plan. Just to whittle down questions, to think about what was feasible to do, what was really the most important priorities for review. So I do think that that's really important, that the actual carry out time might be low, but particularly for a group that on a maturity scale was pretty novice, it took a lot of planning time.

Farhad Khan (00:52:30)

Yeah, that's a good point. When we were planning the meetings, we were trying to schedule a time to do the meetings as well. So in parallel, we were developing that facilitator guide and absorbing all the information, especially as the consultants working at the time with them, learning about the program at the same time. Trying to map out how to break down those evaluation questions into questions you could bring to a meeting with participants, that took about a month and a half. And that also included interviews with the project staff and that included the literature review as well. So it was a very iterative process where the questions we brought to those meetings and the planning, that was informed by our review of the existing information and preliminary interviews with the project staff. And so that was fairly extensive. Thank you, Lara.

Emily Stammer (00:53:39)

Okay, great. Thank you all. So now we're going to transition to a five minute break for you to refill your tea or coffee, have a snack, do whatever. It's currently 8:56 Eastern time right now. So I'm going to ask everybody to come back around 9:01. While you're having your break, we're also trying to gauge interest in a few additional sessions. So we're going to put up a little poll while you're away. If you have a moment to answer, when you get back from break, that would be great to sort of help inform some of our future sessions. So we'll see you all back around 9:01.

Devyn Bell (00:54:25)

Thank you, Emily. So as Emily said, I'm Devyn Bell and I'm here today to talk about MKA's internal pulse surveys and how we use them to pause and reflect on how the project is going. Next slide please.

Devyn Bell (00:54:40)

So we first started these surveys in June of 2020 as a way to gather anonymous feedback from MKA staff on how the project is going. The goal of the surveys are to collect data that will guide project wide decision-making. And we launched these surveys. Semi-annually usually in June and December, they take about 15 minutes to complete and contain anywhere from 15 to 25 questions, with all responses being anonymous. Surveys contain a combination of quantitative and qualitative questions and are designed to build off each other. And what I mean by that is our first pulse survey in June of 2020 gave us a baseline of what was working well and what were areas for improvement.

Devyn Bell (00:55:23)

The next pulse survey asked if the areas that were working well are still working well and if the areas for improvement still needed work. So we continue to ask these questions in this format to see if the action steps we designed based on the pulse survey results are actually solving identified areas of improvement. We also use these surveys together, additional feedback on items, such as the team's MKA related workload, our onboarding process and MKA developed systems and products. So for example, we ask if individuals feel personally set up for success. If they select no, or sort of, we ask them to include details on what their specific concerns are. Now, since these surveys are anonymous, we can't follow up with the individuals directly, but we can use this information to see where there might be systemic issues that aren't setting people up for success.

Devyn Bell (00:56:17)

Another example is we asked staff who joined the project in the last six months to rate their onboarding process on a scale of one to five and provide additional information on what they liked and what they felt could use improvement. Now, with the previous results we've received, we have been able to adjust our onboarding process and we hope to see these changes reflected positively in our June, 2021 pulse survey results. So once the results of the poll survey are compiled, the MKA management team meets to discuss the identified issues and create action items to address them. The results and action items are then presented to the entire MKA team, and we also provide periodic updates during our all staff meetings on certain action items to show how we're progressing towards fixing these areas of concern. Next slide, please. Go ahead and click three times, Sammy. Thank you.

Devyn Bell (00:57:19)

MKA is currently collecting data for its third pulse survey and we continue to adapt the survey based on feedback. And thanks to this feedback, we have learned a few lessons over the past year and a half, but we do expect to learn more as we continue. So the first lesson is that pulse surveys need to be accompanied by action items and continued follow-up and communication. We make a point to continue to bring up our action items to ensure that we're working towards fixing areas of concern instead of just identifying them and doing nothing.

Devyn Bell (00:57:51)

And two other lessons learned related to the format of the survey. We found that multiple choice questions are filled out more frequently than free response questions. However, free response questions do allow for us to gather a greater level of detail. It's important to have a mix of the two questions to both gather informed detail, but also keep the respondent's attention. Now, last lesson was also to be aware of the length of the survey and use tools such as branching and sections where you can. Now branching allows for the survey to potentially be shorter depending on the respondent's answers, and the sections are a useful tool to help break up the survey into smaller chunks. So I'll stop there for now, but if anyone has questions, please let me know.

Emily Stammer (00:58:40)

Okay, well, feel free to go ahead and put questions you might have for Devyn in the chat. Thank you for that, Devyn. So our final two round Robin presentations are from Momentum Country and Global Leadership Award. We're going to start with Alicia Hurlbert, who is a program manager who will talk about after action review. Alicia.

Alicia Hurlbert (00:59:04)

Thanks Emily. Hi everyone. I'm going to talk about my experience facilitating an after action review a little bit earlier this year, when I joined MCGL in November of last year, the youth team was about halfway through a specific sub activity. And actually we can go to the next slide, that'll probably help us work through the actual sub activity. So the sub activity itself was one in which MCGL TAs were coaching youth leaders within the International Youth Alliance for Family Planning or IYAFP Country Chapters. The goal of the sub activity was to coach these youth on how to implement, measure, document interventions, to maintain essential family planning or reproductive health information and services for youth during COVID-19. As the activity progressed and the technical team had several check-ins on the progress, we found that the goal was changing a bit based on the needs of the youth.

Alicia Hurlbert (01:00:00)

It was moving away from the COVID-19 specific work that we had originally intended, and in some cases, even away from the family planning, reproductive health work. So it became a little bit harder for us to conceptualize the tangible outputs from this activity. We wanted a way to capture learning from this experience, both so that we could document it for the project and for USAID, but also so that we can improve upon an activity like this in the future. So we decided to conduct an after action review with all of the stakeholders involved, including the youth and the TAs. Our end goal of the activity is ultimately to capture and package this specific activity and the learnings in a brief that we'll share with youth community and stakeholders, as well as USAID and global donors. And on the next slide, I'll show you how we plan to get to that and the steps we've taken so far. We can go to the next slide. Thank you.

Alicia Hurlbert (01:00:53)

So the timeline of events leading up to the after action review is important, especially to gather buy in and set the tone for the after action review. So you'll see here that on the first part of this continuous line, that the MCGL youth lead, who had been leading on this activity and was well known by all participants initiated the process by sending an email to introduce me to the team and to ask what everyone thought about an after action review process. She didn't flat out say, "We're going to do an after action review." Rather, she suggested it and asked for thoughts and feedback. This is a really good step to ensure that one, people knew this was coming and could start thinking and reflecting and two, it instilled a sense of buy-in across the stakeholders. So we sent out a survey form via Google forms.

Alicia Hurlbert (01:01:38)

You can see the four typical after action review questions at the bottom of the slide, as well as the prompts that we sent out to everyone. We gave the team a little more than a week to complete the survey and most completed it. I think there was only one or two who never did fill it in. But the answers we got from the survey, we're very thoughtful and honest. I reviewed all the survey answers and I pulled summaries of the key themes into a PowerPoint that we would later use in our virtual meeting. Although all stakeholders accepted the virtual meeting, there were two youth who had technological issues in joining the meeting. One was due to internet and unavailability of internet at the day and time of the meeting and the other simply confused the day and time of the meeting itself. Aside from that, though, it was a really good meeting.

Alicia Hurlbert (01:02:25)

People were honest, they confirmed the summary of the survey findings, but they also brought up new points. It was a good discussion. So, because two of our youth were not able to join, I followed up separately with them on a one-on-one phone call via WhatsApp. This was a really important step, I think, just to allow them a chance to express their feelings and to give feedback. And then finally, we drafted an after action review report based on the information we received in the survey and the information we received in the meetings with all stakeholders. And we sent this after action review report around for review and feedback. And then you'll see that our last step there is to take the information from that after action review, as well as the information we've gained from this activity overall, and to create this larger brief, which will then be able to share with the USAID and other global stakeholders. We can go to the next slide.

Alicia Hurlbert (01:03:19)

So here I'll share some of my key takeaways from facilitating this after action review. I think the first one, which is a very important one, is to figure out the right platform. There are so many different platforms out there. We have Zoom, Teams, you can even conduct an after action review through WhatsApp like I did with two of the youth participants, but really thinking about the platform in which every participant has the best chance of accessing. The second one is if the after action review involved staff and other time zones, and particularly if they may not have an online calendar, consider sending a reminder an hour or so before the event to remind the participants that it's happening. The after action review survey was really useful for us in order to capture the feedback and experience of all of our participants in a very concise way.

Alicia Hurlbert (01:04:07)

And then we were able to use that for our meeting later on. Another really important piece is setting the tone for the meeting. So taking a minute when you start the after action review, to make sure that everyone feels safe, they understand the purpose of the after action review, the set meeting norms to express that you won't directly call out anyone in either the after-action review meeting or on any of the subsequent reports that you'll work on afterwards. And then additionally, thinking about some of the questions you have on the results you may have received in the survey beforehand will help you to make sure that there's no awkward gaps, or if the conversation doesn't seem to be flowing freely, you have a few prompts to sort of probe some of the questions and answers you've received.

Alicia Hurlbert (01:04:56)

And then I'll also add facilitating this as more of a neutral or non-biased facilitator was a little bit easier because I wasn't involved in setting up this activity in any of the initial conversations between MCGL and IYAFP. So it was easier for me to come in and truly hear both sides without being biased and taking a side. So it was nice that I was able to play that neutral role. And then the last lesson learned here is really just constantly reemphasizing the purpose of the after-action review and really explaining why we're doing this at multiple points throughout the process. That's it for me, but happy to answer any questions.

Emily Stammer (01:05:43)

Great. Anyone have any questions for Alicia? Looks like we're getting questions in the chat. Maybe that's the best way if anybody has any questions for her. Go ahead.

Jim Ricca (01:05:54)

Yeah. Alicia, thanks. That's really interesting. I really liked the idea that you sent the questions out before, because the power dynamics are always difficult in meetings like this, and sometimes people don't want to speak up, but if they've already answered beforehand, I guess that would probably help. I'm wondering, did you do it for that reason or was there some other reason and how do you feel like it worked? You did say that you thought it was good to have done it beforehand, so I just wanted to know a little more about what the thought was there rather than just facilitating it in real time.

Alicia Hurlbert (01:06:30)

Yeah. Thanks, Jim. I really liked doing it beforehand. To be honest, this is the first time I've done a survey online first. Other after action reviews I've facilitated in the past have been just a meeting to come together, but those were internal meetings. And since this one was an external meeting where we were having youth participate, we on our side and on the MCGL youth team, we assumed that it would be easier to get our youth to open up in a more confidential way first and that we can then use the information that they submitted to our Google form to be able to probe and to continue to ask those questions. So we did use it particularly because of the power dynamic, I think also because it was an external meeting. So we were unsure of whether or not our youth would feel comfortable just coming into a meeting off the bat and sharing feedback. So it was a really good way to prompt and start the discussion, and it worked really well.

Emily Stammer (01:07:40)

Great. I also liked that you followed up with folks who weren't able to attend using WhatsApp. That's a great way to make sure that everybody is involved. Okay. All right. If you have other questions, please feel free to put them in the chat. Otherwise, let's turn things over to Deb Sitrin, who is an MER advisor with MCGL who's going to talk about lessons learned meeting. Deb?

Deborah Sitrin (01:07:54)

Thanks Emily. So I'll be sharing one experience, conducting a lessons learned pause and reflect meeting within MCGL. And this example is from a COVID response wash IPC buy-in in four countries. Next slide, please. So lessons learned as a phrase that we often use when someone is just summarizing what was learned from some experience, as has already been done in this meeting a couple of times, but now I'm using Lessons Learned with capital Ls to talk about something a little bit more specific, which is a structured pause and reflect meeting that is an intentional effort to reflect on program experiences, to identify lessons, and most importantly, make practical recommendations.

Deborah Sitrin (01:08:27)

Lessons Learned meetings, just like any pause and reflect would generally be done at junctures, where it makes sense to reflect and think about what could be done differently. And it's used to reflect on fairly specific themes, not as a project as a whole, or a specific activity, like an after action review, but on themes. And I'll review our themes in a minute just to give some illustrative examples. And in general, like a lot of the other pause and reflect, it would be done with a diverse group of people, ideally those who maybe were more directly involved in the project and those more indirectly involved. So actually that's a slightly different group than maybe you'd have an after action review where you'd have people who were actually in the activity.

Deborah Sitrin (01:09:38)

Here, you're looking at themes and hopefully including people who maybe are less directly involved, but to get their perspective as well. I'll explain one structured format for Lessons Learned meeting that MCGL was using, but there could be some slightly different formats that could be used. In the format that we're using, there are three rounds which are done sequentially. These rounds are shown in the figure and they build on each other. So in the first round, participants identify positive and negative experiences, which could be intended or unintended experiences that they can think of that are related to one theme. In the second round, participants then reflect on what contributed to each of the experiences identified in round one. And then in the third and final round, develop specific recommendations based on what emerged in rounds one and two. Usually participants would be split into three groups, although the number of groups and themes is more flexible than the number of rounds.

Deborah Sitrin (01:10:45)

You always have three rounds, we're usually recommending three groups and three themes, but that's more flexible. If you do have three groups and three themes, what you do is each group does the first round with a different theme and then they shift. So one group would do theme A for round one, theme B for round two and theme C for round three. Another group would do theme B for round one theme C for round two, theme A for round three, if that makes sense. So each group is doing a different theme for a different round. So they build on what another group did for the prior round. So it's really important that at each stage, somebody takes really good notes and that you have a facilitator who stays with each theme and doesn't rotate.

Deborah Sitrin (01:11:39)

And so what they do is they use the hopefully, really good notes that are taken, recap for the next group. And then that group can carry forward what the previous group had done. Hopefully that makes sense. It's a little hard to explain quickly, but hopefully that all makes sense to everyone. I'm happy to clarify again later if I need to. So next slide, please. So getting back to the specific example that we ... Can you advance one? There we go. Okay. Thanks. So getting back to the specific example. So for this COVID response wash IBC buy-in we had five learning questions we had identified for the buy-in. And then for three of the questions, we thought it would be appropriate to pause and reflect about halfway through the project, which was a fairly short buy-in and what we were learning, using a Lessons Learned meeting.

Deborah Sitrin (01:12:32)

And so here you can see I've circled, what were the three questions that we thought we would try to in part answer through this Lessons Learned meeting. Lessons Learned seemed like an efficient option that would help us to understand and document some important experiences and what we might want to do differently, or the same, for the rest of this buy-in as well as other buy-ins under MCGL. So from the three questions, we developed themes for the lessons learned meeting. Theme one was virtual approaches to quality improvement. Theme two was how facilities were using data to track quality aims, theme three was working with faith-based organizations. So as you can see, the themes were fairly focused. So not so broad as a theme like data, but instead were how our facilities using data to track quality aims. You can also see from this, I wanted to include this, Lessons Learned meetings were not the only way we want it to pull out learning.

Deborah Sitrin (01:13:35)

We were also using other methods, some of which were talked about here, some of which will be talked about in other meetings as part of this workshop. But we're using a number of methods to pull out learning. So this was just one and it's meant to compliment the other methods. So when we go to summarize our learning, we're actually going to be pulling from several different sources. And all of this learning together will hopefully feed into some final products that we're planning, including briefs, presentations. Next slide, please.

Deborah Sitrin (01:14:06)

We also want to get the perspective of different stakeholders for learning questions. We decided that a lessons learned meeting was a good way to get the perspective of MCGL consortium staff in the four countries where we were implementing. So that's who was invited to participate in these. We're using other methods to get the perspective of other stakeholders for this particular example, for this particular buy-in.

Deborah Sitrin (01:14:33)

Next slide. So generally Lessons Learned meeting, like an after action review is a pretty simple tool to use. It doesn't require a lot of advanced planning since it doesn't require any data we have to collect and review in advance or interviews done ahead of time. So in that way, it's pretty simple to do and to implement and to work into programs. Here are just some quick tips based on this experience using the format I described for our lessons learned meeting. The first is that using a virtual whiteboard was helpful. In round one we let people individually post sticky notes of all the positive and negative experiences that they could think of and that they wanted to share before we discussed as a group. That allowed everyone to share their perspective not just the most vocal people. So I think we got more experiences and more people could share various experiences. And in theory, we actually did send out our virtual whiteboard ahead of time, hoping that people would start adding some of their experiences and thinking about it in advance of the meeting. It didn't actually happen in reality. I think people were too busy to actually do it. We were hoping to get a jumpstart for more efficiency because we knew time would be tight, but it didn't quite work, but in theory, it could work.

Deborah Sitrin (01:15:56)

And another advantage of using sticky notes is that at least for round one, it is our note taking. So we didn't have to worry about doing a lot of note taking in addition to that. So that was really helpful, because like I said, having really good notes is really important for this format. Also, we found that when doing this meeting virtually, it was really hard to do all three rounds in one setting. Because we didn't want people to burn out with a long virtual meeting. So we tried to keep it to one and a half hours by only doing round one and two in the first sitting and doing round three, several weeks later. And that actually worked out just fine. And in fact, I think it would even be possible to do each round in a different sitting. So three different sittings, if that works better for scheduling. You do need to have enough participants to split into groups, whether you're dividing into two, three or more groups, you really want to have enough people for good conversation.

Deborah Sitrin (01:16:52)

We actually ran into a bit of trouble with this. We unfortunately, we started with a fair number of people in round one, but we had several people who had to drop off even with just keeping it to an hour and a half. We had several people who dropped off early. So we had to improvise on the spot. And after round one, we actually merged our three groups together and did round two as just one group. And we had to work through all three themes together. It didn't actually work out okay, but just giving that as a caveat, it wasn't quite ideal, but sometimes you just have to improvise when the reality hits.

Deborah Sitrin (01:17:28)

And then we decided round three, which is a few weeks later that we would, again, just do that as one group, since we had done round two as one group. Also it was really helpful to have just a standard, simple documentation template to take notes on. So we didn't have to think about that, that we just could easily take notes while we were doing it. And we actually, with MCGL, we have simple documentation templates for all the qualitative monitoring tools we are using. I think Louis Ortiz who's I think on this call is our knowledge management advisor and should really be credited with that. So those are just some general tips based on this one experience. So I'm going to end here and happy to answer questions. Thank you.

Emily Stammer (01:18:14)

Great. Thank you, Deb. If you have questions, feel free to put those in the chat for Deb. Otherwise, I think we're going to move to breakout discussion just in the interest of time. So thank you all so much. Thanks to our presenters. So great to see the work being done by our momentum colleagues. Feel free to reach out to them. If you have additional questions or want more information, I know they're happy to act as resources. So we're going to switch gears now to the breakout discussions. We've assigned everybody to a breakout room. We'll be sending you to those shortly.

Emily Stammer (01:18:48)

Each group has a facilitator who will self identify in the group, but it's likely to be one of today's speakers or an MPA staff member. Today, it's the speakers. I created a jam board this week. It has the CLA maturity cycle on it, as well as the questions. I'm going to put it in the chat. There is a French version of the CLA maturity cycle on the second page, but let's go ahead and break out for about 10 minutes to discuss these questions. And then we'll come back and do a really short debriefing before we move into the final presentation. So thanks everybody.

Silence (01:19:28)

Karen Levin (01:19:40)

I can share just for our group that I think one thing we all had in common is that we were still pretty early on in the implementation phase of our projects. And so we talked a little bit about where we were theoretically on the spectrum versus where we were actually on the spectrum. And then, theoretically we all had a lot of plans in place. And so, we were further to the right on the spectrum, but in terms of actual implementation we were quite far to the left.

Lucy Wilson (01:20:04)

Mm-hmm (affirmative). That's why it's a useful tool, isn't it?

Karen Levin (01:20:07)

Yep.

Lucy Wilson (01:20:09)

Thanks. Anyone else?

Silence (01:20:10)

Farhad Khan (01:20:19)

I would say we agreed in the Francophone group, we agreed as well. Talked about how the theory versus practice, because we are in a startup phase for MSS FPO, but MKA seems to be implementing pause and reflect in a lot of their activities and is probably more advanced in that spectrum.

Lucy Wilson (01:20:48)

Great. Thanks. Yeah. I think in our group we had several of the MEL and adaptive learning experts and so I feel like our breakout was often a little further along towards institutionalized. Anyone else? We'll take one more comment and then move on. And we can also just move on. Emily, do you want to introduce Jessica or I can go ahead and do that? Our next speaker is Jessica Shearer, who is the MEL expert for the M-RITE project. Jessica?

Jessica Shearer (01:21:32)

Thank you. Thanks so much everyone, the facilitators, organizers this has been great, really, really fantastic discussion today. So I've been asked to provide a perspective from one of the momentum awards on the use of a complexity aware monitoring tool. And so, I've chosen to talk today about our use of root cause analysis, and you might not hear root cause analysis discussed often for monitoring, but today I'm going to tell you how we're planning to use it for monitoring. So next slide please.

Jessica Shearer (01:22:05)

Next slide. Great. So this is just a bit about M-RITE. Our vision is a world in which all people eligible for immunization from infancy throughout the life course, and particularly underserved marginalized and vulnerable populations are regularly reached with high quality vaccination services and use them to protect their children and themselves. So this is M-RITE's vision. And if we go to the next slide, you'll see that M-RITE and immunization in general is at this point where we have reached the lowest hanging fruit, globally we've plateaued in terms of vaccine coverage for nearly a decade now around the mid 80%.

Jessica Shearer (01:22:48)

And so reaching the unreached means doing the most challenging work. It means dealing with the most complex systems, complex challenges and probably introducing complex interventions. So for that reason, complexity aware monitoring is really, really important to the work that we're doing in M-RITE. So we go to the next slide. So one of the tools in our tool kit is root cause analysis. And again, the mandate of M-RITE, is to understand what are the entrenched obstacles, the barriers, the bottlenecks, the root causes of the fact that we still have many under immunized and zero dose children in the world. And so, one of our tools to understand those root causes is root cause analysis. You might be familiar with this method. It's also called the five whys. It's a problem-solving method to identify or predict, develop hypotheses, the underlying root causes of an observed challenge.

Jessica Shearer (01:23:44)

So you'd start with a challenge, like we have too many zero dose children in our community, and you would ask why back from there? So why did that happen? And you get a number of causes, why you get more causes, and you might've seen this built out as a diagram. You might've also seen fishbone diagrams, which are very similar to this. So that's root cause analysis. I will say that I've used root cause analysis for years and years and years. And started off using it as a researcher, as mostly an analytical tool, but more and more in evaluation, we've been using it as a participatory tool to solve problems in real time. And today I'm going to tell you about how we're planning to use it for monitoring in M-RITE. So if we go to the next slide, I just wanted to compare the RCA method overall to some of the principles of complexity aware monitoring.

Jessica Shearer (01:24:32)

Some of the key principles of complexity aware monitoring and RCA are that they're able to uncover multiple interconnected causal relationships, they are explicit about context and assumption between results or between observed causes in a causal chain. They enable the capture of unintended outcomes, particularly through discussion, reflection and iteration on which outcomes matter. And then they also both can support participatory processes and understanding of stakeholder perceptions. Next slide. So this is our vision of how we use root cause analysis for design of interventions and monitoring those interventions. So starting with where that star is, first, we identify a key challenge that our project needs to overcome. Then we chart the RCA diagram. We validate that RCA diagram through a participatory process, we identify the most actionable root causes that if solved would lead to the greatest impact. We design and implement interventions, typically a suite of interventions to address that root cause.

Jessica Shearer (01:25:51)

And then we monitor and adapt, of course. So if we go to the next slide, you'll see that in this final section here, I think that this really ties in so well to causal link monitoring. So, we're using root cause analysis as our initial step in developing our causal link monitoring causal chains to improve the design and monitoring of our interventions. So if we go to the next slide, I'm going to give you an example of how we're doing this in the Democratic Republic of Congo right now. So we started off in January working with the EPI program in DRC to identify their key challenges. We've been asked by USAID and DRC to perform an assessment. And so we've had a generous assessment phase and we've tried a lot of really, really interesting approaches that people have heard some of in other sessions.

Jessica Shearer (01:26:41)

But anyways, we were working with the EPI program to identify key challenges they face. So we did that with them. We drafted RCA diagrams with of course stakeholder input at the national level in DRC, but also with inputs from our global momentum experts, which was helpful in developing those draft diagrams. And then we discussed and validated those in a national participatory workshop. But the big great fun part has been, then we went to a number of provinces in health zones in DRC to collect qualitative data, to further refine and validate these RCA diagrams. So we do use a mix of quantitative and qualitative data through our assessment, but the output is much more accurate contextualized refined RCA diagrams. So that's where we are right now in DRC. We're also in the process of identifying the most actionable root causes from those diagrams, and then moving forward in the next month, we will be designing and implementing interventions to address those, and then moving forward from that, of course, monitoring and adapting.

Jessica Shearer (01:27:47)

So if we go to the next slide, this is in French so you're not expected to read this, but this is just an example of one of our RCA diagrams looked like at one point, we call them dynamic RCAs because we expect them to change all the time. I'm talking like day to day, week to week as we collect more data and we have weekly debriefing and pause and reflect sessions to continue to iterate on these. So this is just an example. What I wanted to highlight is the importance of identifying these deeper root causes. So if we go to the next slide, I've just taken one of the causal pathways here, and it's in English now, so that you can see it. So our overall challenge is the high number of zero dose children in DRC. And there's a lot of causes of that first level for this.

Jessica Shearer (01:28:36)

And so, this is just going down one of these causal chains. So families cannot access services, is one of the reasons that's why we keep on asking why. Why can't they access services? Because they can't afford the fees for services or the fees for the vaccine cards that they're being asked to pay. And so then we ask, why are they being asked to pay? Immunization is supposed to be free. Well, health workers are charging user fees and charging for the cars. And so we're asking why is that the case? And that's because health workers don't receive a reliable salary or a prime, which is like an incentive payment in DRC. So then we ask why is that happening? And we've learned from our assessment that there are a number of root causes for the fact that health workers are not being paid.

Jessica Shearer (01:29:21)

So this has been a really, really important tool for us because this is such a politically sensitive issue. We've been able to bring this back to stakeholder workshops and have people discuss around this and have conversations about how to address some of these underlying root causes. You can see probably from this, that if we don't address that final layer, that bottom layer of root causes, we aren't likely to be able to change the situation. So if we go to the next slide where we are in terms of next steps, as I mentioned, we will be co-designing interventions with PEV and other PEV as EPI. So EPI And other stakeholders to address those underlying root causes. So that's our next step. Will be work, planning, and developing a work plan around these root causes. And of course, other entrenched obstacles in DRC. But then what I'm really excited about as part of the work planning process is using these RCAs to then build out causal link diagrams.

Jessica Shearer (01:30:19)

And so, I've changed all of the language now from the negative to the positive, so it's almost starting to look like a causal link diagram where we see results in a chain. And we unpack the assumptions along that causal chain. So as we convert this to a causal link diagram as part of our work planning and developments of our meal plans, we'll be routinely and continuously monitoring this whole process to understand which of these results is being achieved, what is changing, what are the unintended consequences? Because again, this is such a complex and sticky issue. I think that there'll be a really, really important method to understand if we are achieving the change that we expect to achieve. So like other projects, we haven't done this yet, but we're really excited about it and I hope I can come back and share what we're learning in a later session. So that's it. I'm happy to take any questions for comments. Thanks.

Emily Stammer (01:31:22)

Great. Thank you, Jessica. It looks like Karen has a question about how you determine most actionable root causes? Are those that are the most feasible to address or the most impactful or both, or neither?

Jessica Shearer (01:31:38)

Yeah, Karen. That's a great question. We developed a bit of a prioritization criteria, so it included criteria like feasible, obviously as it within M-RITE's comparative advantage or niche technically, but then also trying to estimate the potential impact of addressing that. And we think of impact both in terms of what's the reach of a potential intervention and also what is the potential change? So there's a lot from implementation science that we've applied to think about those most actionable and most impactful root causes.

Jessica Shearer (01:32:19)

Soumya asked if we need to do ethics reviews? Soumya, because we have such a large assessment in DRC, and it's more of a formal assessment. We did go through the IRB and DRC. But I would say moving forward when we're doing more of this rapid learning and iteration and rapid causal link monitoring, pause and reflect, that will just be a part of our routine M&E. And so, we probably wouldn't go through a full IRB.

Emily Stammer (01:32:55)

Jim has his hand up.

Jim Ricca (01:32:58)

Yeah. Thanks Jessica. That's awesome. That's really, really interesting. This is something that came up, I think a week or two ago, and we were talking about CLA, I think USAID was on the call and RCA... I don't know, has come from QI, the QI world. Although, actually frankly 30 years ago I used it. It was a similar methodology for building up an entire program, log frame or essentially you did a problem analysis and then you flipped it positively and that became your log frame. But anyway, the QI world captured that tool and used it. So here's the question. Do you feel like CLA is QI or are they the same thing or not, because it's interesting you're using this tool that is very identified with QI?

Jessica Shearer (01:33:51)

Yeah, I think we're trying to use it as that and we're trying to use it as an analytical tool as part of our evaluation and we're trying to use it as a stakeholder engagement tool. So I think it could have a number of different uses, Jim. Yeah. And so I think that's what we're experimenting a little bit more for the QI purpose, because we feel a bit more comfortable with the other uses of it. It has a 40 year history. I will say it. Yeah. It has a long history, but in my experience, I've received mixed reviews from users on root cause analysis, I think from the evaluation community and from the M&E folks that are here. Sure, it's great. We understand the purpose. From other folks I've heard, oh, it's too complex, it's too much to look at. What am I supposed to do with this? So I think that's Jim, where we're trying to test this out as an accessible QI tool. And so I think that will be really interesting to see while we were in there.

Emily Stammer (01:35:08)

Okay, great. Thank you so much, Jessica. If you guys... It looks like there was a couple of questions in the chat if you're able to answer there, that would be great. But we need to... We've got a couple more slides before we wrap up for the day. So thank you so much, Jessica. Next slide, Sammy. Just from the talk through briefly today's main takeaways. We've talked about how pause and reflect is useful, evidence-based approach plays an important role in the CLA program cycle, knowing where your project falls on the maturity spectrum, it will help inform the type of P&R activity you want to do.

Emily Stammer (01:35:46)

There are a number of different types of P&R that can be used by individuals or groups. And we last heard from Jessica about root cause analysis, which is a CAM approach that we can use to identify or predict underlying causes of observed changes. So the next slide, please. Our next session will be next Wednesday. We're going to do an introduction to outcome harvesting. We'll have examples of CAM from JHU CCP and from USAID Progress project. Don't forget to register. I will drop that link in the chat. Otherwise, I'm going to turn things over to Lucy for the pause and reflect.

Lucy Wilson (01:36:36)

Hi again, everyone. So for today's pause and reflect, we're going to use the approach described in the video that Laura shared earlier, individual journaling and reflecting on what we've learned. So for today, if you could grab a pen and paper or open up a blank document on your computer, and then take a few minutes to reflect on the following questions shown on the left and write down your answers. So the questions that we'll be thinking about are, what are the main lessons that you've learned today? Then, what are the lessons that you've learned across this series so far, if you've attended multiple sessions? And then how are you going to integrate this learning into your work?

Lucy Wilson (01:37:27)

So you're welcome to just write your reflections down individually, but we'll also open up a Rise Up pad, and we'll put the link in the chat. And if you want to share your reflections with us, we'd love to see them. So you can just copy your notes in the Rise UP pad. It's up to you if you want to do that. But we do hope that you'll take a few minutes and reflect on your learning. We're just about out of time, but we do want to thank you all for joining us today. We're also going to launch the poll again, the same pool as we did during the break. But if you missed it during the break and want to take a moment to answer the poll now, that would be great.

Lucy Wilson (01:38:08)

We'll also stay on the line for the next minute or two in case you have questions or want to discuss, we can continue using the chat and you can continue thinking about your reflections and putting anything that you have into the Rise Up pad for the next few minutes. Remember the evidence shows that it'll make you more productive. So thank you again.

Emily Stammer (01:38:42)

And thank you to all of our presenters today, from all of the different awards, we really appreciate you coming and sharing your experiences. I think they're really helpful. And to Dev and to Sammy for helping behind the scenes, I couldn't do it without you. So thanks everybody.