



IN ACTION REVIEW

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In Action Review: Learning During Doing

Introduction

A disciplined approach to “Learn from Experience” is critical to the enduring ability of the Inter-American Development Bank (IDB) and its regional partners to make effective knowledge-based decisions and optimize development outcomes. In order to achieve the desired results, learning before, during, and after everything we do must be ‘part of the way we work’ at the IDB -not something extra.

The IDB has developed several methodological tools that will help Bank personnel and their regional stakeholders identify, capture, and as applicable, share their knowledge for re-use by others. As shown in Figure 1, these methods to mainstream learning from our individual and collective experience in every phase of our project cycle (and other key operational processes) include the Peer Assist,¹ After Action Review,² Knowledge Capture Interview,³ and In Action Review.

Knowledge captured using these methods can be analyzed and organized using the ‘Knowledge to Action’ methodology,⁴ which produces and organizes actionable ‘Key Learnings’ for re-use by their target audience(s). Key Learnings captured from individual projects can help teams solve current operational challenges and improve performance indicators. The cumulative capture of Key Learnings from multiple projects in a specific country, (sub-)sector, or business process allow for the compilation and validation of a critical mass of relevant knowledge, which can be disseminated effectively through an integrated online knowledge base and/or be leveraged to develop or update training or other capacity building efforts.

This way, the IDB can ensure practitioners are able to take advantage of what has been done and learned before in IDB operations, and make effective decisions based on the latest available knowledge.

What is an In Action Review?

The In Action Review (IAR) is a ‘learning during doing’ technique that helps teams identify and share what is working and what is not immediately after finishing a specific meeting, event, or other activity or process.

¹ For more information see Peer Assist, Inter-American Development Bank, 2012.

² For more information see After Action Review, Inter-American Development Bank, 2012.

³ For more information see Knowledge Capture Interview, Inter-American Development Bank, 2012.

⁴ For more information see Knowledge to Action (K2A), Inter-American Development Bank, 2012.

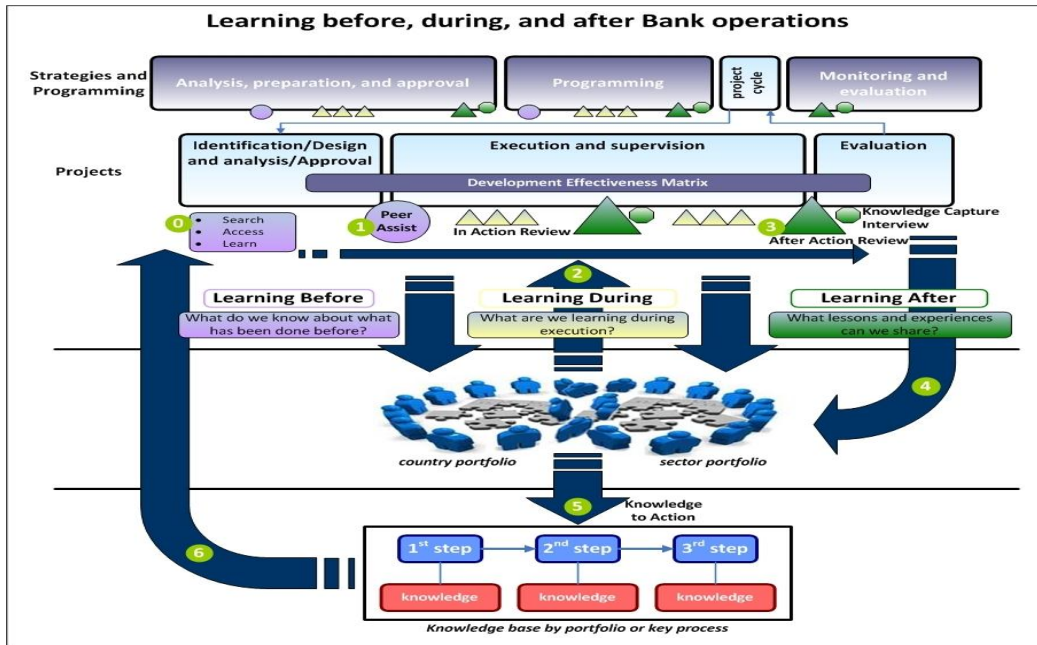


Figure 1. Learning from project experience -before, during, after.

The IAR is based around just four questions:

- What was supposed to happen?
- What actually happened?
- Why were there differences?
- What can we learn from this, and use for the next time to make an improvement?

What is the value added of an In Action Review?

An IAR is designed to quickly identify key learnings for both the team and individuals that can be re-applied immediately within the same context and to build trust and confidence among team members. The IAR is an effective management tool to learn within projects so you can reinforce within a team what is working and avoid repetition of mistakes. It can also be a valuable input to an 'Ayuda Memoria'.

If applicable to a broader audience, identified lessons may be shared or followed up with others outside the team (e.g. members of a Community of Practice, or a country or sector portfolio).

How can I make In Action Reviews part of the way we work and what support is available?

All it takes to conduct an IAR is a commitment to open discussion and a way to record the results. Little to no formal preparation time is needed. Because they take so little time to execute, IARs can be used many times over the course of a project. Anyone on the team should be able (and encouraged) to call for an IAR when something unexpected or unplanned happens as a result of a specific meeting, event, or other activity or process.

The IAR is a quick (15-30 minutes) and simple team learning process held after key team activities or interim milestones. In general, an IAR should be carried out when memory is fresh and unvarnished, participants are still available, and the learning can be applied immediately. The right time to call for an IAR depends on the context of the team and the project/activity they are working on. This can include events a team organizes, after every important team meeting with government, private sector or any other counterparts, at the start of periodic project update/team meetings, or at any other time that something happened over the course of a project that should not be allowed to pass by without taking a moment for reflection.

The KNL team is available to provide methodological and training support teams to plan and conduct In Action Reviews and to determine the best way to document and disseminate their outcomes, if applicable.

For more information, please contact KNL at aprenderdelaexperiencia@iadb.org

What are some keys to conducting successful In Action Reviews?

Open Climate:

The key to successful IARs is open and frank discussion. The objective is to learn and as a group, try to find a solution to the problem. Accordingly, IARs are learning events, not critiques or evaluation events. This may require some demonstration by the leader of the team at the beginning of the discussion.

Facilitation:

The facilitator may or may not be the team leader. Rotating the facilitator role among team members each time is recommended. Most importantly, the facilitator of an IAR must ensure that the meeting is open and blame is not brought into the process. IARs are designed to reveal and address real issues and learnings surrounding a team event. Therefore, it is important that the facilitator guide the conversation to the real and sometimes unspoken issues. The facilitator should make sure the process is quick and simple.

Participation:

For an IAR to be a successful reflection and learning activity, it is imperative that:

- Only those involved in the event participate
- Everyone in attendance should participate
- Everyone is on an equal footing in the learning process -no hierarchy

Documentation:

Documenting the key elements of an IAR as it is happening can help visualize what has been contributed so far for participants. For example, it makes it easier to compare 'what happened' to 'what was supposed to happen' and therefore will facilitate sharing learning and experiences within the team. You should not have to do much work upfront. It can be done simply with paper and pencil or a flip chart and markers. Documenting the IAR also enables the team to more easily share IAR outcomes with others outside the team, as needed.

Is there an In Action Review (Documentation) Template I can use?

This template may be used to help guide a team in doing (and documenting) an In Action Review. Please keep in mind that the key purpose for doing an IAR is to learn and quickly apply the learning on the job the very next day. If documenting the IAR gets in the way, don't demand it (it is more important to apply the learning and improve performance).

Task/Activity:	<i>Provide a brief description of the job, activity, or team which was subject to the review.</i>
Key Contact / IAR Recorder:	<i>This is the name of a person who can be contacted if more information is required.</i>
Date of In Action Review:	
Location of In Action Review:	
Participants/Team	
<p>What was supposed to happen?</p> <p><i>Everyone shares their own understanding of what should have happened. This is often the most revealing part of the process. Unless the event had a clear, unambiguous, and well-communicated purpose and plan, it is likely that different members of the team each had a different understanding of what was actually supposed to happen.</i></p> <p>Facilitator Suggestion: <i>Ask people to quickly write down their personal understanding of what was supposed to happen. Then, after a maximum of two minutes, ask them to read to the group what they wrote.</i></p>	<p>What actually happened?</p> <p><i>Establish the facts about what actually happened. This is used to identify a problem, not a culprit. Save analysis and interpretation for the following two questions that focus on the facts.</i></p>
<p>Why were there differences?</p> <p><i>Comparing the plan to what actually happened is when the real learning begins. Successes and shortfalls are identified and discussed. Agree to create action plans to sustain successes and help remedy shortfalls.</i></p>	<p>What can we learn from this, and use for the next time to make an improvement?</p> <p>Facilitator Suggestion: <i>Ask people to quickly write down one key point they will take away from the meeting. Often, the act of writing it down helps participants focus on what is important and will help them retain what they learned for future events.</i></p>



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