Recommended tools for PMER of advocacy

3. Reflect and review

When should I use this? For periodic workshops at key moments throughout the year.

What does it do? It creates space for **monitoring** and **evaluation** through reflection, analysis and learning about progress, achievements and change.

Why is this useful? It provides a structure for learning and assessment of progress in a dynamic and changing context, to help adapt your approach.

What is reflective practice, and why use it?

As WaterAid increasingly works in the field of advocacy and influencing, different approaches and behaviours are required, seeking to address complex development problems in a constantly shifting context. A means of taking the time out to reflect on programme or project past actions (what went well, and what did not?), and adapt and plan for future actions (how can we do better?) should become a regular exercise involving project teams and other stakeholders. This is particularly necessary for advocacy work because our effort is non-linear and hard to quantify.

Responding and adapting to the context also requires agile and flexible working. Adaptation requires constant learning and reflection, and making iterative course corrections to our actions. ‘Reflective practice’ is a key feature of ‘adaptive management’ models, and is an important part of monitoring, both for accountability (to be able to communicate to communities, donors and stakeholders what we have done) and for learning (to improve the effectiveness and impact of our advocacy as we progress).

Features of the reflect and review process

Reflect and review sessions are central to our PMER of advocacy approach. They provide the space to bring together all the other tools outlined in our common approach and use them to inform reflection, learning and decision-making.

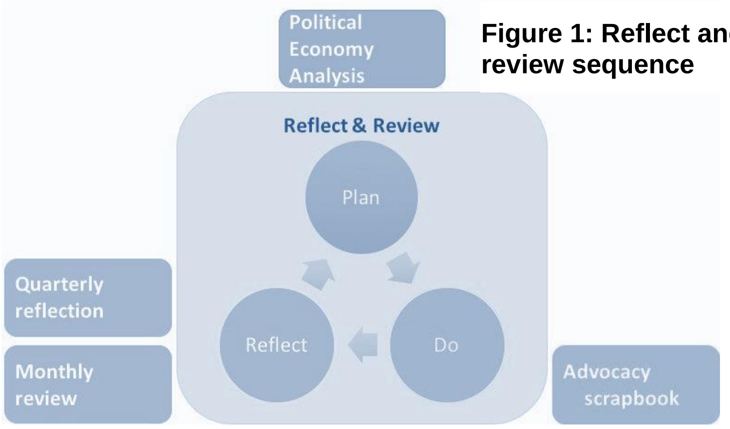

Figure 1: Reflect and review sequence

Figure 1 shows how the tools set out in our common approach form part of an ongoing reflect and review action-learning process.

Key features of this process are:

- Flexible and exploratory in the face of uncertainty.
- Based on learning, monitoring and feedback followed by course correction during the life of the programme/project (act, sense, respond).
- Asks open and reflective questions, such as 'Are we doing the right things?' as opposed to 'Did we do what we set out to achieve?' and documents the answers.

Documenting a reflect and review session is essential, because it enables you to look back on the lessons learned when you come to evaluate your programme or project and plan your next. Documented reflections are also very valuable when shared with other teams and countries as part of peer-to-peer learning across WaterAid.

Step by step: what to do

Preparation work

1. **Decide the frequency of reflect and review meetings** dependent on your programme/project needs. The PMER core procedures require reflection on programme performance (programme performance reflection – PPR) at least quarterly, and that ‘project monitoring should take place at least quarterly’. Projects that are more advocacy-oriented and in a rapidly changing context will need to be reflected on more frequently. Below we outline a **monthly ‘review’ meeting** which is short, light touch and checks on progress; and a **quarterly ‘reflection’ meeting** which is more in-depth and focused on learning and improving.

2. **Agree on and invite team members or partners and other stakeholders** who would have valuable insights for the reflection. This may vary meeting to meeting.

Monthly review meeting (light touch)

3. **Reserve sufficient time. 1–1.5 hours** should be enough without being too much.

4. **Agree on a chair or facilitator and a documenter.** It may be a good idea to rotate this responsibility. The meeting **must be documented.**

5. **Ask participants to do relevant preparatory work in advance** so that they come to the meeting with an accurate, up-to-date understanding of the current situation. This could include reviewing the advocacy log to ensure they know what recent activity has happened, and analysing the project finances.

6. Structure the meeting around **key updates or highlights around strategic intents** for the programme or project. This is an opportunity for teams and

individuals to share updates, success and challenges.

7. **Document** key updates and develop these into a programme or project monthly update (max. two pages) that can be shared to inform stakeholders of progress.

Quarterly reflection meeting

8. **Reserve sufficient time.** Consider setting aside a **half-day to full-day** workshop.

9. **Bring documents** and evidence to the meeting (such as your political economy analysis (PEA), advocacy log, stories of change from previous 'most significant change' exercises, results of studies, correspondence, and media clippings).

10. **Agree on a chair or facilitator for the meeting and a documenter.** It may be a good idea to rotate this responsibility. The meeting **must be documented**.

11. **The chair should ensure the meeting serves as a collective learning experience, not to find fault or evaluate an individual's performance.** All participants should feel free to speak up without the fear of reprisal, and everyone should be encouraged to be open, honest and respectful.

12. Use the first session of the workshop to plan a regular **monthly meeting** to update on progress.

13. In the second session of the workshop, **discuss the following open questions** (but don't limit yourselves to these). Remember, open questions start with 'what', 'how', 'where', 'when', 'why'?

    - What were you trying to address (the problem)? Has anything changed?
    - What did your PEA tell you about the drivers and barriers to change? Has anything changed since your last PEA, such as a change in minister, an election, or a change in economic situation?
    - What were your milestones and how were you keeping track of progress?
    - What's working well and how could you do more of this?
    - What's not working well and why? What should change or be adjusted?
    - What positive and negative impacts are you having?
    - What key things should you modify in your approach?
    - What was beyond your control?
    - What barriers did you successfully avoid or overcome?

14. For the third session, create space for **a broader, more 'big picture' reflective exercise**. You could consider:

    - **Reviewing the context** through updating aspects of the PEA, or inviting an external speaker to share perspectives.
    - A m**ost significant change** process, with other relevant stakeholders invited to the workshop to share their stories of change.
    - **Discussion on a theme** that is relevant at that time, such as partnerships, sector opportunities, or new strategies to build momentum for change.

15. A final session should concentrate on agreeing **specific actions** that will continue to improve what you do and how you will work.

After the meeting

16. **The results of your reflection can be used as an input to the project RAG (red/amber/green) rating.** This provides an overall assessment of project progress, along with narrative to support or explain the rating.

17. **Documenting is essential**. At minimum, keep a record of actions. These can be captured at the project level in Project Center in the **actions** log**,** found in the media section of the project homepage. The table in Project Center is as follows:

Date	Action	Who?	When?	Open/closed

18. **One action may be to revise the project design.** This would require a project modification which would be recorded in Project Center.

Some useful references

- BOND, Adaptive management and what it means for CBOs available at www.bond.org.uk/resources/adaptive-management-what-it-means-for-csos
- Example: WaterAid Cambodia's reflection on progress towards WASH in healthcare facilities, and accompanying blog – www.wateraid.org/news/blogs/2016/october/six-steps-towards-clean-health-care-settings-in-cambodia