**www.pmadata.org/stlr**

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**We invite you to use and adapt PMA STLR tools!**

Whatever tool you discover and intend to try out, you will *need* to adapt these tools to your context.

This may include:

* ***Changing questionnaire question text*:** Some tools contain questions from our questionnaires ([*publicly available here*](https://www.pmadata.org/data/survey-methodology)), along with their numbering. Note that, in some cases, question numbering has changed across phases, but any questions cited in a tool use consistent numbering *within* that tool.
* ***Considering appropriate pronouns:***We use female pronouns quite often, as PMA worked with female enumerators – *and* as a bonus, we are happy to use a feminine pronoun by default for a change!

**TIP: *Use our hashtag system!***

As we used these tools across various country contexts, we developed a simple system of using hashtags as placeholders for information that will need to be updated based on the country, context, culture, and program.

For example, information in a tool that was country-specific is noted with the hashtag placeholder, *#countryspecific* – or possibly an even more specific placeholder like *#districtlevel* or *#localpartner*.

Information that required a change in date is noted with hashtags such as *#todaysdate* or #*lastyear*.

These hashtags allow those adapting the tool to use the Find&Replace function to quickly identify and update all instances of a hashtag within seconds.

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**How to Facilitate a Reflection Conversation**

This guide provides evidence and explanation for why reflection is an important part of the learning process, and then provides concrete strategies and tools for a facilitator to use when leading learning reflection conversations.

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*When adopting, adapting, and sharing this tool, please use this suggested citation:*

“How to Facilitate a Reflection Conversation”, created by Sarah Nehrling, for PMA (Performance Monitoring for Action). Released June 2024. CC BY-NC 4.0.

**How to Facilitate a Reflection Conversation**

**Why is reflection important?**

According to various research on learning and education, **reflection is the KEY behavior for a successful learning orientation**.

Dr. Michele Rigolizzo reminds us that, “**Reflection requires slowing down and bringing tacit knowledge to conscious awareness, but getting into the habit of reflection is notoriously difficult**” ([Rigolizzo, 2017](https://dash.harvard.edu/bitstream/handle/1/40620141/RIGOLIZZO-DISSERTATION-2017.pdf?sequence=7&isAllowed=y)). Rigolizzo’s review of previous research states that:

*"Individual learning has been extensively studied by educators, cognitive scientists, and management scholars as a process of action and reflection that leads to a change in long-term memory because, once knowledge and skills are embedded in long-term memory, they are learned (Corkin, 1984; Ericsson & Kintsch, 1995; H. A. Simon & Chase, 1973).*

Furthermore, *“… reflection plays a key role in understanding complex materials and systems. During critical reflection, individuals examine their performance in an attempt to understand the underlying principles of the domain (Chi et al., 1981).”*

Rigolizzo goes on to specify that, *“Research in management theory and adult learning (Mezirow, 1990; 2000; O'Neil & Marsick, 1994; Schön, 1983) shows that the behavior underlying these the abilities to understand complex systems is premise reflection, which is ’assessing the grounds [justification] of one's beliefs’ (Dewey, 1933, p. 9). Beyond accepting the failures and successes that occurred during practice, this behavior involves analyzing why they occurred in order to generate a new understanding of the domain (Ellis & Davidi, 2005a). This indicates that critical reflection is only possible after learners gain some level of competence. The outcome of critical reflection is long-term because reflection results in a deeper level of understanding of fundamental principles (Mezirow, 1990). This understanding leads to the ability to consistently perform, even in novel situations (H. A. Simon & Chase, 1973).”*

Reflecting on learning has three main benefits:

1. By recognizing progress made (*content-focused*), reflection builds confidence and fosters pride in new skills.
2. By reviewing what led to this process (*process-focused*), it helps a learner to understand what worked and what did not.
3. It allows a learner to intentionally plan their next learning steps (*in terms of both content and process*).

**How can reflection happen?**

Reflection can happen **individually and in groups** – although group reflection can often prime individuals to take the time to reflect individually.

Reflection can also happen both *during* the action as well as *after* the action, what Donald Schon referred to as **reflection-in-action** and **reflection-on-action**. One may feed into and reinforce the other. Reflecting on the action, after the action has happened, can bring this “tacit knowledge to concrete awareness”. This awareness can then be activated and the learning applied while reflecting while in action.

|  |  |  |
| --- | --- | --- |
|  | **Individual** | **Group** |
| **Reflection-in-action** | *Example:* In-the-moment reflection | *Example:* Live debriefings to course correct |
| **Reflection-on-action** | *Example:* Learning journaling | *Example:* TKX Goal Club reflection |

Reflection can focus on the learning about the action/skill and concrete learning tied to it, as **single-loop learning**. It can also focus on the broader and more generalizable learning and lessons, bringing the learner to **double-loop learning**.

For example:

I spent an hour a day learning new Stata code from YouTube videos and I made so much progress.

* *Single-loop learning*: I can learn new Stata codes from YouTube, and I can make progress when I set aside time regularly for that learning.
* *Double-loop learning*: I am highly motivated to learn new technical skills. I can make progress toward my learning goals by setting aside time regularly. I can effectively learn through simple videos.

These types of learning and reflecting improve an individual’s **metacognition[[1]](#footnote-1)**, their awareness and understanding of their own thought processes, their ability to think about their thinking – *and* their learning.

Reflection feeds metacognition feeds learning.

“Metacognitive practices increase students’ abilities to transfer or adapt their learning to new contexts and tasks (Bransford, Brown, & Cocking, p. 12; Palincsar & Brown, 1984; Scardamalia et al., 1984; Schoenfeld, 1983, 1985, 1991). They do this by gaining a level of awareness above the subject matter: they also think about the tasks and contexts of different learning situations and themselves as learners in these different contexts.” - [Vanderbilt Center for Teaching](https://cft.vanderbilt.edu/guides-sub-pages/metacognition/)

**How should I facilitate a reflection conversation?**

Below are some key ideas for facilitating a reflection conversation[[2]](#footnote-2):

***Preparing and Beginning***

***Prepare the right questions****:*

Have some key questions and question starters ready for your conversation:

* Start with open and broad questions
* Stay flexible on the direction of the conversation; you do not need to use all of the questions - go where the conversation needs to go, and balance structure and non-structure. Let the conversation go where it might… Some people will need more structure, but others will feel constrained by it.
* Draw from existing questions, conversation guides, and conversational formats, as helpful;
	+ *Reviewing the “*[*Group Learners Check-In Guide*](https://www.pmadata.org/tool/group-learners-check-guide)*”* *another tool available for download, which gives step-by-step recommendations and lots of potential reflection questions*
	+ Consider [Project Zero’s Visible Thinking routines](https://pz.harvard.edu/thinking-routines), such as [“Connect, Extend, Challenge”](https://pz.harvard.edu/resources/connect-extend-challenge) or [“3, 2, 1 Bridge”](https://pz.harvard.edu/resources/3-2-1-bridge)

**Set the tone, both in the invitation and during the call**

**Be patient, especially in the beginning**: Reflection conversations can have a slow and rocky start, especially as people build the reflection muscle, which is even tougher when they are living or working in an environment that doesn’t have a strong culture of reflection or of learning:

* Share some basic prompts to open their minds up to what learning progress looks like:
	+ Learning can come in many forms!
	+ Learning can come in small and subtle steps, or in leaps and bounds.
	+ Sometimes you learned something and didn't even realize it.
	+ Maybe you learned *what* to do, maybe you learned *how* to do something (better, quicker, etc.).

***Throughout***

**Embrace silence**: Get comfortable with silence. People will talk to fill silence, and in talking, they can often begin to work their way into reflection!

* Silence might mean they're thinking, not necessarily that they didn't understand or don't want to share.
* Consider building in 3 minutes of silent reflection and writing (“thinking time”) before asking people what they learned/want to share (“sharing time”). This time allows everyone to sit with their own thoughts, dig deeper, and benefit from their own reflection, before others start talking and possibly derail or discourage their own reflection. It will also give them time to prepare to share, which might make them more comfortable sharing.

**Facilitate lightly, with certain “moves”:**

* Echo or paraphrase what you've heard
* Ask others to weigh in with experiences, advice, etc.
* Call on voices that have not yet weighed in, both encouraging them but allowing them to opt out
* Think-Pair-Share, when helpful
* Make general invitations for more participation, more information
	+ Can you tell me more about that?
	+ Anything else? Anyone else?
	+ What are we forgetting?
* Model what you're looking for - but only when necessary
* Remember that both learning and reflecting are very culturally-affected concepts, so be aware of power dynamics, and be ready to adapt your questions

**Get curious**: Try to partner with the learner in better understanding their learning experience and needs:

* Ask them about the progress they made
	+ Where were you before this learning (on a scale of 1-5)? Where are you now (on a scale of 1-5)?
	+ How did this progress connect to what you already learned and did?
* Ask them about the emotional experience
	+ What felt easy? Enjoyable?
	+ What was more challenging? Discouraging?
	+ Where are your limits?
* Ask them to dig into *how* they learned and how to improve that
	+ What was it about what you did, how you did it, that resulted in learning?
	+ What helped you (resources, timing, rhythm, type of approach, etc.)? Who helped you (colleague, expert, etc.)?
	+ What would you do differently next time? What was ineffective or less effective?

**Create space for stories, details, examples**: It's easy to stay in an abstract space, but the more a learner can dive into the details of what they learned and how, the more they'll be able to: 1) celebrate that success → benefit from that motivation, and 2) extract why they were successful → reproduce the successful elements in future learning

***Toward the End***

**Try to end with clear and feasible actions and next steps:**

* Get details about where there are still learning needs in this area
	+ What is still confusing or unclear to you?
	+ *Where were you before this learning (on a scale 1-5)? Where are you now (on a scale 1-5)?* Where do you want to go (on a scale1-5)?
	+ Are there any specific 'gaps' in your knowledge that you should focus on? Do you need to fill these gaps before progressing further?
	+ Do you even want to learn more about *this* thing? Or is there another skill that is more (1) urgent, (2) relevant, (3) opportune to learn?
* Prompt them to plan forward
	+ What specifically do you want to learn next? What specific progress do you want to make?
		- What makes this learning meaningful and a priority? What difference will it make in the work you’re doing?
	+ By when do you want to make this progress?
	+ How can you get there?
* Keep in mind the concept of "***scaffolding***" and the **Zone of Proximal Development**: there are certain things a learner can reach up to on their own, with time and effort, and there are other things that they will need someone else’s help to reach; help the learner to reflect on
	+ What's within your control and abilities?
	+ What do you need help with? How can you get that help?

**Remember - and if necessary, refine - the ultimate goals of this conversation:**

* Single-loop and double-loop learning - dual tracks:
	+ Learn about technical steps - what to do
	+ Learn about learning - how to go about learning what to do, refining, improving, etc. (*individual, procedural, internal, etc.*); leads to continued and improved, and often more self-initiated and self-directed, learning
* Recognizing and celebrating efforts, progress, and PMA-internally existing expertise/skills
* Long-term = create, support, and improve reflective practitioners

**What should I *avoid* when facilitating a reflection conversation?**

Certain moves will hinder or even harm the reflection conversation process:

* Accepting as a reflection, "I did ok but I can do better" - don't accept that as an answer! Not detailed enough to be actionable - and maybe not even true!
* Only wearing the content expert hat
	+ *Or*, when *you do* have relevant content expertise, only wearing the reflection facilitator hat
* Giving simple feedback, focused on general encouragement or tasks and content (*“Good job!”, “You did this task!”*); instead, mention specific learning attitudes and evidence of skill development (*“You persisted despite initial challenges with the technology.”, “You used to take 2 hours to work through this, but I saw you did it in 15 minutes last time.”*)

**Are there prefabricated sequences and models for reflection?**

Yes, there are! If YOU are someone who does better with structure, you might consider adopting, adapting, or just generally playing with an existing sequence or model.

Here are a few:

[**Four Steps for Reflection: Look, Think, Learn, Plan**](https://www.ed.ac.uk/reflection/reflectors-toolkit/reflecting-on-experience/four-f)**[[3]](#footnote-3): *Look*** *back* →***Think*** *in depth* →***Learn*** *about yourself* →***Plan*** *your next steps*

**Step 1: Look back at a situation or experience**

Look back at something that happened or some thought you find yourself focusing on and describe it briefly.

**Step 2: Think in depth about your experience or thought**

Think in depth about why your experience happened or why your thought is so important to you. What hunches, ideas, guesses, interpretations come to mind as you analyze your experience? (Probably the most important piece.)

Here are some phrases to use to get your thinking started:

*“significant aspects were” or “important ideas were” or “useful issues arose from”*

*“previously I thought/felt/noticed or did not know, did not question …”*

*“this might be because of” or “this is perhaps due to ….”*

**Step 3: Describe what you learned about yourself or your role**

Write what you’ve learned about yourself, your role, or the situation.

Here are some phrases to get you started:

*“I have learned that …” or “I now realize …” or “I now feel …” or “I find myself wondering if …”*

**Step 4: Plan what you will do next**

Describe what you’re going to do next/ your action plan, next steps. This may be resolving to do something differently the next time; it may be adopting a new attitude or changed thinking; it may be needing to puzzle further.

[**Gibbs' Reflective Cycle**](https://www.ed.ac.uk/reflection/reflectors-toolkit/reflecting-on-experience/gibbs-reflective-cycle): *a cyclical model that leads you through 6 stages exploring an experience*

* Description
* Feelings
* Evaluation
* Analysis
* Conclusion
* Action plan

**What? So what? Now what?**: *a classic formula, adapted for learning reflection:*

* What did you learn? *What did you learn about how you learn?*
* So what? *What is the importance of what you learned? How might it impact your work? What is the importance of what you learned about how you learn? How might that impact your next learning efforts?*
* Now what? *How can you continue to apply and improve what you’ve learned? How do you continue to apply and improve what you’ve learned?*
1. “Metacognition is the process of thinking about one’s own thinking and learning. It involves knowing when you know, knowing when you don’t know, and knowing what to do when you don’t know. In other words, it involves self-monitoring and correcting your own learning processes. For example, you engage in metacognition if you notice that you are having more trouble learning concept A than concept B, or if you realize that your approach to solving a problem is not working, and you decide to try a different approach. Metacognition also involves knowing yourself as a learner; that is, knowing your strengths and weaknesses as a learner. […] Metacognitive processes can be applied to learning and thinking in all disciplines and contexts. It is an essential skill for life-long learning…” – [Queens University](https://www.queensu.ca/teachingandlearning/modules/students/24_metacognition.html) [↑](#footnote-ref-1)
2. These two resources also include helpful texts and ideas:

	* <https://www.uvm.edu/~dewey/reflect.pdf>
	* <http://reflectivepractice.net/teacher-tools/facilitation-tips/> [↑](#footnote-ref-2)
3. © 2006-2016 Case Western Reserve University School of Medicine [↑](#footnote-ref-3)