GUIDE TO THE AFTER ACTION REVIEW

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A simple, but powerful method for rapid post-project assessment

- The After Action Review is useful for reflecting upon a project during and after its completion.
- Sharing the results from your AAR can help future teams learn your successful strategies and avoid pitfalls you have worked to overcome

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AFTER ACTION REVIEW
OVERVIEW

Organizational learning requires that teams continuously assess their performance to identify and learn from successes and failures. The After Action Review (AAR) is a simple but powerful tool to help you do this. Conducting an AAR at the end of a project, program or event can help you and your team learn from your efforts. Furthermore, sharing the results from your AAR can help future teams learn your successful strategies and avoid pitfalls you have worked to overcome.

About the After Action Review

First used by the Army on combat missions, the AAR is a structured approach for reflecting on the work of a group and identifying strengths, weaknesses, and areas for improvement. It is routinely used by project teams in the VA's Emergency Management program and by corporations such as GE, British Petroleum and Motorola. An AAR conducted after hurricane Katrina led to new systems for communications during natural disasters.

One team member reported, "without an AAR you eep learning your lessons again *the hard way!*"

An AAR is centered on four questions:

- What was expected to happen?
- What actually occurred?
- What went well and why?
- What can be improved and how?

An AAR features:

- An open and honest professional discussion
- Participation by everyone on the team
- A focus on results of an event or project
- Identification of ways to sustain what was done well
- Development of recommendations on ways to overcome obstacles

Who should use this AAR tool?

This tool is for all teams who want to maximize learning from their work (ranging from one-time events to long-term projects). Regardless of project outcomes, there are always successes to document and lessons to learn. The entire project team should attend the AAR; everyone's voice counts.

When should we use the AAR tool?

This tool can guide your team in conducting an AAR shortly after a project or program ends. The same approach can also be used with less structure or formality midway through a project for the benefit of the team if the work isn't progressing as the group would like.

What time and resources do we need to use this tool?

Formal AARs are ideally conducted with a facilitator, while spontaneous or informal AARs can be led by a member of the project team. The time required to conduct an AAR varies. A formal review may take 1 to 2 hours. Informal AARs may be conducted in whatever time your team can allot. A conversation as short as 15 minutes might identify barriers to your progress and strategies to overcome them.

USER'S GUIDE TO THE AFTER ACTION REVIEW

Conducting an AAR can offer insights to project participants and provide guidance for future teams engaged in similar efforts. Using this approach to routinely review projects and programs will contribute to a culture of continuous organizational learning and improvement.

This guide will teach you how to conduct a formal After Action Review. An AAR features:

- advanced planning,
- a facilitator who, ideally, is not a member of the team, and
- a report that captures the lessons learned

The same framework and questions may be applied with less advanced planning and documentation as an *informal AAR.*

The facilitator or team member who will lead the AAR should read this guide carefully before scheduling the AAR session.

STEP 1. PLANNING AN AFTER ACTION REVIEW

A. Logistics

Once the team has decided to conduct an AAR, the facilitator (or responsible team member) should schedule the session, ideally, within 2 weeks of project completion.

For best results:

- Conduct the team meeting in person, rather than by phone or teleconference
- Ensure participation by all team members
- If an outside facilitator is being used, he/she should meet with the team leader to become familiar with the work before conducting the session.

How much time should we plan for our AAR?
The time you allot for your AAR will depend on a variety of factors, including the critical nature of the event or project and the resources available to your team (including the availability of team members). It is recommended that you set aside a time equal to 20 minutes per team member. If necessary, the review can be continued on a second meeting day.

Should we have an outside facilitator?
Outside facilitators may be more effective. They are less likely to get caught up in the content of the conversation and can encourage all team members to participate in the conversation.

If there is not an external facilitator available, a team member can fill this role. When a team member serves as a facilitator, it is important to ensure that they participate in the discussion as **both** facilitator and team member. Self-facilitation is a little tricky but with proper attention, it can be done successfully.

Where can I find a facilitator?
Ask someone from the Quality Management, Systems Redesign, or Patient Safety office in your facility or VISN. If your facility has a training department, one of their representatives can also fill this role.

Supplies

Flip chart and markers
AAR Report Template (see below)

Meeting roles

Note taker: Assign a team member to take notes on the flip charts. If the AAR is an hour or longer, consider having team members rotate this job so everyone can participate fully.

Timekeeper: Assign times to the sections of the AAR in advance and ask someone to play the role of time keeper *(this is important - it is easy for groups to get lost in conversation and not have time to cover all sections of the review)*

B. Organizing the AAR discussion

There are several approaches that can be used to organize the AAR discussion. The facilitator should consider the options and choose an approach before the session.

By key events, themes or issues

When there is a logical set of themes or events, it may be useful to organize an AAR discussion around them. For instance, to conduct an AAR for a learning collaborative, one might focus on themes, such as pre-work, the content of the learning sessions, the coaching, and reporting and measurement. A systems redesign team might use the VA-TAMMCS[1] framework to organize the discussion. (Did we have the right team? Did we work well together? Was there a clear

[1] For more information, refer to the VHA Office of System Redesign's VHA Systems Improvement Framework Guidebook, posted at https://srd.vssc.med.va.gov/Pages/default.aspx.

and measurable aim that everyone understood and worked toward? Did we use data to understand our current processes?)

Chronological order of events

When there is not a logical choice of themes or events, a chronological review can be easy to structure and understand. It follows the flow of the activity from start to finish. By covering actions in the order they took place, participants may more easily recall what happened.

Other approaches

Sometimes an AAR facilitator will employ a blended discussion technique that draws from elements of a chronological and thematic review. Other approaches a facilitator might integrate include:

- Drilling further into the process or resources behind an event or set of events
- Asking participants to identify unexpected results and discuss their impact
- Collecting data through complementary or more detailed review methods (evaluations, surveys, statistics, etc.)
- Simply asking, "What worked well and what didn't?"

STEP 2. CONDUCTING AN AFTER ACTION REVIEW

A. Introducing and "setting up" the AAR

The task of the facilitator (or AAR leader) is to guide the group through a review of the project, using a standard set of questions:

- What was expected to happen?
- What actually occurred?
- What went well and why?
- What can be improved and how?

Start by reminding the team of the purpose and context of this meeting:

- The goal is to guide and improve the work of future project teams.
- The AAR does not grade success or failure.
- There are always weaknesses to improve and strengths to sustain.
- Participants should share honest observations about what actually happened (objective data) without assigning blame or praise.

- No one has all of the information or answers. Everybody has something important to contribute.
- Set an atmosphere of openness. If necessary, you can introduce ground rules or expectations for the session.

Sample ground rules for an AAR

- Active participation: it is important for everyone to participate
- Everyone's views have equal value
- No blame
- There are no right or wrong answers
- Be open to new ideas
- Be creative in proposing solutions to barriers
- "Yes….and" rather than "either/or" thinking
- Consensus where possible, clarification where not
- Commitment to identifying opportunities for improvement and recommending possible improvement approaches
- No record of the discussion will be distributed without the agreement of all participants
- Quotes will not be attributed to individuals without permission

B. Guiding the AAR Discussion

This part of the meeting will be a conversation. There are two options: asking the probing questions and let the conversation develop; or, if the team is more subdued, identifying the issues first and then choose the ones to work on as a team.

Ask, "What was expected to happen?"
Start by asking what the project team originally set out to do. Begin with the charter or other project planning documents. Encourage details. Some prompts that may be useful include:

- What was the purpose and objectives?
- Who was the audience?
- What was the initial timeline?
- Who was involved?
- What outcomes and outputs were intended?
- What products were to be produced?
- What facilitators and barriers were expected?

Ask, "What actually occurred?"
It is important that participants focus on what transpired without determining what was good and what was bad. It is also important that full participation is encouraged so that all can add

their perspective of what happened. Resolve inconsistencies in the story and/or fill in gaps in the story.

Facilitator tips

- *Give participants a couple of minutes to think about and perhaps write down their ideas before anyone speaks.*
- *To get maximum participation from the group, try going around the room to give everyone a chance to speak or asking quieter members for their ideas first.*
- *Ask participants to be specific in their statements and avoid generalizations.*
- *Summarize or repeat back to the group often*
- *Focus on the facts. Feelings need to be acknowledged, but future recommendations have to be based on agreed facts.*

Ask, "What went well and why?'

Always start with the good points. Ask, "What were the successful steps taken towards achieving your objective?" or "What went really well in the project?" We should be seeking to build on best practice as much as we can, and identifying strategies to ensure that successful practices are built in to future work and repeated.

Facilitator tips

- *During this segment, "bad" points as well as "good" will be raised. Try not to pass judgment - it will stifle participation. Let everyone be heard and move on to the next participant or topic.*
- *If time is short, a good approach is to ask people what they thought had the greatest impact on the success they achieved. If this has already been covered, ask them to choose the next most important factor.*

Ask, "What can be improved, and how?"

Identify the stumbling blocks and pitfalls, so they can be avoided in the future.   The following prompts may be useful:

- Given the information and knowledge we had at the time, what could we have done better?
- Given the information and knowledge we have now, what are we going to do differently in similar situations in the future to ensure success?
- What would your advice be to future project teams based on your experiences here?

Facilitator tips

- *When trying to identify the root cause for a problem or something that didn't go well, ask "why?" several times.*

- *It is important that discussions of stumbling blocks not become witch-hunts or finger-pointing exercises.*
- *It is okay to let people have their say, but you may have to keep pulling them back from the problems of the past to ask "so what would you do differently next time?"*

C. Closing the AAR Discussion

To close the AAR session, summarize key points identified during the discussion. The session should end on a positive note, linking observations to recommendations for future improvements. Let the team know what the plans are for reporting and sharing the lessons learned during the AAR. (A draft report form is included in this module)

Assign roles for follow up

The team leader and facilitator should discuss in advance the process for writing up the AAR report. Share this with the team, ask for volunteers if desired. Clarify for the team who will receive copies of the report.

STEP 3. SHARING THE AAR RESULTS

The greatest benefit of an AAR comes from applying the lessons learned to future work and teams.

The AAR Report Template offers a convenient format for summarizing the findings of your AAR. Some steps a team leader or facilitator can take to increase the likelihood of having an impact on future work include:

- Provide a clear summary of concrete and actionable recommendations that will improve the process.
- Identifying tasks and topics requiring leadership attention.
- Share the AAR report with your project sponsor or other appropriate leader in your facility, VISN or national VHA offices.

AFTER ACTION REVIEW REPORT TEMPLATE

Background:

1. **Team/Project Name: ____**

2. **Project/Event Reviewed:**

3. **Date of Review: ____**
4. **When review was completed:**

   ☐ **During Project**

   ☐ **After Project Completion**

5. **Participants**

NAME	JOB TITLE	ROLE IN TEAM
		Facilitator

6. **Please provide a summary of your project or event**

7. What went well and why?

(What were the successful steps taken towards achieving your objective?)

Successes	How to Ensure Success in the Future

8. What can be improved and how?

(What could have been done better? What can we do differently in similar situations in the future to ensure success? What would be your advice to future project teams?)

What can be improved	Recommendations

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