

## Section 8.4: After-Action Discussions and Lessons Learned

### PURPOSE AND POLICY

Once the grant is closed out, the grant program manager should prepare for a debrief regarding the grant. This will allow the principals involved with planning and executing the grant and the related program activities the ability to discuss what worked, where improvements can be made and how to best sustain the program. This is the time and place to examine successes and/or challenges in managing the grant-funded program and related administration.

The after-action discussion may be a simple debrief among key grants management or program personnel or it may require a more formal meeting to dig into lessons learned and determine how these lessons would improve future projects. A more detailed discussion would be warranted if there were significant issues or problems during the administration of the grant or that occurred while managing the grant-funded program. The other scenario in which a more formal after-action review would be required is when the grant-funded program was a pilot project.

**Roles and responsibilities.** The grant program manager should organize any type of after-action discussion. Key personnel on the grants management team should bring their subject matter expertise to the discussion (i.e., the financial representative would be expected to discuss how to properly prepare a budget forecast for the program). In an informal review, the grant program manager should lead the discussion. In cases that require an in-depth after-action review, the grant program manager may determine that a neutral third-party facilitator is needed to lead the discussion and capture actionable items.

### PROCEDURE

Elements of the after-action review include planning, preparing, conducting and following up. To benefit from an after-action review, the grant program manager should follow these steps to implement a successful review. Lessons learned should be captured and incorporated into policies and procedures, where applicable.

#### Grant administration after-action discussion

1. **Planning.** To gain a better understanding of the grant administration process and apply continuous improvement practices, the grant program manager should schedule a debrief with the grants management team within 60 days of closing the grant. The grant program manager should schedule a date and send the meeting invitation to the grants management team and any other individuals who could assist or learn from the process.
2. **Preparing.** Before the meeting, the grant program manager should ensure all documents are included in the grant file in eCivis. The grant program manager should prepare and send a meeting agenda to the participants 7-10 days prior to the meeting. Prior to the meeting, the grants management team should review the grant program file in eCivis. Items to review would include: the timeline/schedule; lists of tasks in eCivis and whether these were completed on time; the agency's eCivis scorecards (and how this particular grant project scored during the grant lifecycle), program reports and any audit findings. Using the agenda as guidance, meeting

participants should come prepared with discussion points and relevant questions--and be prepared to answer questions regarding their respective roles and subject matter.

3. **Conducting.** An after-action review should be open and inclusive, inviting feedback from all participants. The grant program manager or facilitator should lead the meeting and ensure the focus stays on the subject. One person should be charged with capturing the details of the meeting and highlight any actionable items. The discussion should focus on the expected outcomes versus the actual outcomes and which variables resulted in the difference(s). If there were audit findings, this is the time to address the shortcomings identified in the audit and discuss systemic changes that would prevent such findings in future grant-funded activity.
4. **Following up.** During the after-action meeting, the meeting facilitator or another appointed individual should have captured actionable items and/or recommendations. The grant program manager should prepare an after-action report that details the conclusions of the meeting, how the action items will be implemented and any resulting changes to policies and procedures. The report should be, at the very least, distributed to the meeting participants.

#### **Grant program after-action discussion**

1. **Planning.** To gain a better understanding of the grant-funded program and apply continuous improvement practices, the grant program manager should schedule a debrief with the program implementation team and stakeholders within 60 days of closing the grant. The grant program manager should schedule a date and send the meeting invitation to the program implementation team and any other individuals who could assist or learn from the process.
2. **Preparing.** Before the meeting, the grant program manager should ensure meeting participants have access to all program documents, including the grant application, progress reports (including outcome measures), program evaluation and any research findings, if applicable. The grant program manager should prepare and send a meeting agenda to the participants 7-10 days prior to the meeting. Prior to the meeting, the program implementation team should review program these documents. Using the agenda as guidance, meeting participants should come prepared with discussion points and relevant questions--and be prepared to answer questions regarding their respective roles and subject matter.
3. **Conducting.** An after-action review should be open and inclusive, inviting feedback from all participants. The grant program manager or facilitator should lead the meeting and ensure the focus stays on the subject. One person should be charged with capturing the details of the meeting and highlight any actionable items. The discussion should focus on the expected outcomes versus the actual outcomes and which variables resulted in the difference(s). The discussion also should include sustainability for the program, whether the program should be expanded, and potential funding sources for sustaining (and expanding) the program.
4. **Following up.** During the after-action meeting, the meeting facilitator or another appointed individual should have captured actionable items and/or recommendations. The grant program manager should prepare an after-action report that details the conclusions of the meeting, how the action items will be implemented and any resulting changes to policies and procedures. The report should be, at the very least, distributed to the meeting participants.