TEAM RUBICON

Disasters are our business.
Veterans are our passion.

After-Action Reporting Manual

Version 1.1

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PREFACE

The following document is a doctrinal guide to the functions, processes, and products necessary to conduct After-Action Reporting for TEAM RUBICON (TR) disaster response. It is designed to be both a reference guide and educational tool. It supersedes and guides the application of all plans and standard operating guidelines that concern the After-Action Reporting process. Specific assignments of functions outlined within are contained in TR's Emergency Operations Plans. A few key notes to frame the reader's interpretation of this document:

1. After-Action Reporting is an activity that involves all members of TR leadership. Though Planning personnel will often take the lead, the final product relies on contributions from all leadership personnel. It is not possible for a single person or functional area, no matter their skill level, to complete it alone. All State, Regional, and Headquarters Leaders should be thoroughly familiar with the process and proficient in the ways they can, or are required, to contribute to it.

2. After-Action Reporting is a critical activity for TR, not only in terms of learning from operations, but transparently communicating successes and difficulties to members, donors, partners, and supporters. This transparency differentiates TR from other disaster relief non-profits and is crucial for fostering organizational relationships. As such, After-Action Reports are mission-critical deliverables that need to be completed on time and submitted in a form that is ready for external distribution.

3. The After-Action Reporting Process is designed to create a safe forum in which TR can take full account of events, and the decisions/actions that cause them. Facilitators of this process are encouraged to protect this safe environment by ensuring that proceedings focus on events versus personalities, data collection and analysis is fair and impartial, and privacy/anonymity is respected and protected both during and after the review process.

David Burke – Director of Field Operations | April 20, 2016 Date

Dennis Clancey – Deputy Director of Response | April 20, 2016 Date

INTRODUCTION

Any organization can overcome mistakes and learn from failure. However, it requires experiences to be used as an opportunity for growth. This ability to grow—to adapt, refine, and improve—is the difference between mediocre performance and continuous improvement.

Study and training are critical to learn and prepare for operations. However, operational readiness is incomplete without real-world application. This reality forces theoretically sound preparations to endure the chaotic world of disaster operations. Experience is the only thing that tangibly tests readiness. Capturing, understanding, and applying lessons learned from these experiences is crucial.

For an organization, effectively capturing the lessons of real-world experience requires significant dedication. It can mean calling on people to participate when they are exhausted and ready to go home. It can mean allocating time, money, and assets when there are few left to spare. Even when successful, the results of the process are rarely easy to accept or implement.

TR is dedicated to the process of continual growth, development, and improvement. It recognizes that both it and its operating environment are complex and constantly evolving. TR accepts nothing less than leading the way in shaping how NGOs participate in disaster relief. For the sake of the communities it serves, its members, and the donors who support it, TR will continually seek to increase the effectiveness and efficiency of its operations while developing new ways to "Bridge the Gap."

The After-Action Reporting Manual (AARM) is a critical component of this effort. It contains the method and tools by which TR captures and learns from operational experience. The After-Action Reporting Process is a key component of the organization's emergency operations plans. This manual details the process for effective execution by TR Leaders.

Remember: *He who does not learn from history is doomed to repeat it.*

AFTER-ACTION REPORTING PROCESS

The After-Action Reporting Process is designed to be scalable and adaptable to operation size and available resources. The process involves two phases that must be executed for every TR operation. The tasks/activities involved occur as part of all TR Operations phases. **See Appendix B for a graphical version of this process**.

Phase 1: Hot-Wash

Phase one of the AAR Process within 48 hours of the final response decision (Operation Order approval or stand down). The Mission Planning Team Leader (MPTL) convenes the Mission Planning Team (MPT) for a hot-wash event. This event focuses on identifying successes, difficulties, and opportunities for improvement. All personnel involved in Anticipation Phase activity should attend. The event is facilitated by the MPTL. Special note should be made of incidents, innovations, and other key events. The finalized notes from this hot-wash event are uploaded into the AAR part of the incident's designated Operations Folder when completed.

Phase one continues during field operations. Whenever leadership personnel prepare to return home and/or transition operations, the Incident Commander/Task Force Leader (IC/TFLD) will convene a hot-wash event. This event reflects the MPT's hot-wash activity. The event is facilitated by the IC/TFLD and the Planning Section Chief (if available). All field leadership and command personnel should attend. The IC/TFLD must finalize the notes from the Hot-Wash as soon as practical and uploads them into the AAR part of the appropriate Operations Folder when completed. A brief overview of the hot-wash results should be shared with the incoming IC/TFLD if a transition of command is involved. This may occur multiple times depending on response size, type, and concept of operations.

Phase 2: After-Action Review and Reporting

When demobilization is complete and all TR resources have returned home, the Planner in charge of the after-action process will begin preparations for conducting and facilitating an After-Action Review. The review must occur within 14 to 30 days of final demobilization (depending on operation type—**See Appendix A for details**). Depending on operation type, the form of the review can range from individual interviews to multi-day in-person conferences. No matter the forum, the event should explore key successes and difficulties, define the operation's timeline, and generate actionable improvements. The event should involve all key personnel who filled incident command and field leadership positions. This meeting may be preceded or followed by additional data collection techniques (described in the Execution Guidance portion of the manual).

Once the After-Action Review is complete, the Planner compiles and analyzes the data. The results are captured in an After-Action Report (AAR). The final report is due to Regional Leaders and the National Emergency Operations Center (National EOC) within two to eight weeks of final demobilization. **See Appendix A for details.**

Once the AAR is submitted, Regional and National Leaders review the document. Depending on the operation type, the Planner in charge of the after-action process may be asked to be present the AAR results alongside the IC/TFLD(s) who commanded the operation. The recommended improvement actions and any related action items that may arise are discussed, triaged, and tagged for implementation as part of an Improvement Plan. This Plan includes a list of action items, their priority, any assigned deadlines, and the name of the person responsible for implementation. The Plan is attached to the final After-Action Report—both of which should be submitted to the incident's designated Operation Folder.

ROLES AND RESPONSIBILITIES

The After-Action Reporting process requires the participation of personnel at every level. Any TR Member can report incidents, innovations, and other key events to their field leadership. The following section describes the roles of each level and how they interact.

National Leadership

The TR NATIONAL EOC is ultimately responsible for the effective execution of the After-Action Reporting process. As such, it must ensure the process is effectively supported, its products are reviewed, and improvement points are thoroughly implemented. The NATIONAL EOC's specific role in the after-action process depends on the size and complexity of the operation.

For smaller, single-Region operations (Types 5 and 4 generally), the NATIONAL EOC focuses on providing administrative oversight, technical guidance, and access to national assets. Execution of the after-action process is entirely delegated to Regional and State leadership.

The NATIONAL EOC will take the lead in coordinating and executing the after-action activities for Nation-wide and international responses (Type 2 and 1 generally). For multi-Regional operations, the process execution may be delegated to the affected Region or the Region that coordinated the response (if the two are different). Operations that experience particular difficulties or suffer a critical incident will be handled by TR-National as deemed necessary by the Deputy Director of Response (DDR).

The Operations Planning Associate, supervised by the DDR, is the key party responsible for after-action reporting activities at the National level. The DDR is responsible for supervising the implementation of improvement plans.

Regional and State Leadership

Coordination and execution of the After-Action Reporting for single-Region operations is entirely in the hands of the affected Region's Planning Manager. Their activities and implementation of region-specific improvement plans are supervised by the Regional Administrator. When multiple Regions are involved in an operation, the Planning Managers of all Regions involved are expected to assist in the after-action process by supporting a designated primary planner. State Leaders should support the after-action process as directed by their Regional Planning Manager. The Regional Administrator is responsible for supervising implementation of improvement points that specifically affect their Region.

Incident Management & Field Leadership Personnel

Incident management and field leadership personnel play essential roles as well. The IC/TFLD is responsible for encouraging an environment of open daily reporting, organizing and leading hot-wash activities, as well as delivering the results to Planning personnel. They are also expected to participate in the After-Action Review. The Planning Section Chief is expected to assist the IC/TFLD in these duties as assigned. All other incident management and field leaders should participate in the Hot-Wash, After-Action Review, and data collection organized by Planning personnel.

EXECUTION GUIDANCE

Hot-Washes

Hot-Washes are a critical component of the After-Action Reporting process. They facilitate the capture of ideas, memories, feelings, and perceptions while they are still fresh. This kind of data is notorious for decaying and changing within 48 hours of a given event. It is imperative to capture this input while it is at the forefront of people's minds. The resulting data is key to identifying information gaps, driving analysis, and providing context to subsequent inquiries.

The Hot-Wash itself is an informal, round-table discussion. When orchestrated well, participants enter an open and non-accusatory forum where thoughts and feelings can be safely voiced. Facilitators guide participants in the exploration of pre-identified topics through targeted questioning. Direct input from participants is solicited. Positive, clarifying discussion is encouraged. Extraneous, negative, or accusatory discussion is not tolerated. Remember: this event is for identifying accomplishments and areas for growth—not for tirades or assigning blame. Personnel who have feedback they do not want to discuss openly are encouraged to provide a brief written report to the event's facilitator.

The amount of preparation necessary for hot-wash events depends on the scale of activity. Facilitators of smaller events/teams that involve 5-20 persons may simply invite everyone to a video tele-conference - or gather participants around the back of a pickup truck - for a guided team debrief. Larger teams and events that involve tens or hundreds of individuals can require preliminary sub-team debriefings, multiple facilitators and note takers, as well as significant logistical support. With this in mind, facilitators should make sure that the hot-wash is integrated into their close-out/demobilization planning from the beginning.

Key Guidance Points

- Hot-Wash Objectives
    - Identify accomplishments.
    - Identify problematic issues and needs for improvement.
    - Recommend solutions to problematic issues.
    - Identify and document lessons learned.
- Organizing the Hot-Wash
    - Schedule a firm date and time as soon as possible.
    - Ensure the event fits into the overall close/out or demobilization process.
    - Secure a location sheltered from the elements, relatively quiet. Provide snacks and drinks.
    - Set up a video tele-conference for remote participants. Solicit written feedback as necessary.
    - Secure any administrative supplies or technology needed.
    - Check all systems prior to the event, have a contingency plan, keep it simple.
- Facilitating Discussion
    - Set rules for the event at the very beginning:
        - Silence all cell phones/radios; take mission-essential messages/calls outside.
        - Be respectful of others' thoughts and ideas—no accusations or assigning blame.
        - No sideline conversations or interrupting.
        - Be additive—not repetitive.
        - Speak directly and concisely.
        - Honor the timetable and stick to the agenda.
    - Break the discussion into separate segments using the following core topics. For complex events, break these topics down by function and activity as designated below:

        - Overall (general feedback on execution).
        - Planning and Preparation Management/Incident Management (by function)
        - Specialist/Field Activities (by type)
    - Explore the topics mentioned above through the following questions:
        - What went well? (identify successes)
        - What difficulties were encountered? (identify problems)
        - How can we improve? What would we do differently? (identify solutions)
    - Set up a "parking lot" to document and sideline discussions that do not directly contribute to completion of the Hot-Wash—include these discussions in the notes.
- Documentation:
    - Facilitation and note-taking should be done by separate people.
    - Summarize data collected within the official written/digital notes.
    - Official notes should be scanned and submitted to the Operation Folder's AAR File.

After-Action Reporting and Analysis Process

Proper preparation is the key to running any effective event. The After-Action Review and ensuing analysis are no exception. The nature and scale of preparation varies widely based on identified needs. However, the process for preparation remains the same:

1. Determine data collection requirements, collection plan, and review format.

   The After-Action Review's format is based on operation type, and the data collection plan is chosen by the Lead Planner. This plan is based upon the complexity of the operation, the effectiveness of hot-wash data collection, and the questions that must be answered during the After-Action Reporting process (discussed further in the next section). The plan chosen will indicate the format of the After-Action Review in terms of discussion topics, length, group activities, and mediums for communication. This information directly informs logistical needs and scheduling.

2. Identify and recruit help.

   Based on the activities necessary to complete the data collection plan, it is necessary to recruit personnel who can help conduct collections, organize events, and analyze the resulting data. A short guide to potential helpers:

Facilitator	In charge of guiding and stirring group participation and discussion. Person fulfilling the role must have a detailed understanding of TR policies and emergency management/response concepts. Person must feel comfortable speaking in front of a group, building teams, facilitating, and managing conflict. There may be a need for multiple facilitators depending on event format.
Analyst	Participates in the development of data collection plan and the analysis of the resulting data inputs. Person fulfilling the role must have a detailed understanding of TR policies and emergency management/response concepts. Critical thinking, attention to detail, and the ability to examine and understand large datasets are essential.
Recorder	In charge of note-taking at the After-Action Review. Needs to have a fundamental understanding of TR policies and emergency management/response concepts. Must be able to type/write at speed and effectively capture and condense complex ideas.
Logistician	Provides a variety of services from administrative support for small events to housing arrangements to catering for larger events. Ensures that the After-Action Review event is well organized and supplied. Logistician's abilities and experience should parallel the scale of event being organized. Larger events may require multiple support personnel.
Audio/Visual or IT	A very specific support position or additional duty of the Logistician. Ensures all technology (notably projectors, computers, and teleconference equipment) is set up and working. The person serving in this position must be familiar already with the technology being used.

3. Identify key stakeholders and participants.

   Figuring out who should attend/participate in an After-Action Review involves answering two questions: Who has the information necessary for understanding the response, and who needs to hear that information first-hand? The first group can include Field Leaders, Incident Managers, off-site leadership personnel, and representatives from outside organizations—people who participated in the response. The second group includes key administrative personnel (from inside and outside TR) and those personnel executing the After-Action Review. The Lead Planner and their supervisor must determine who of these should attend the review based on potential contribution, cost limitations, and value of direct attendance.

4. Schedule After-Action Review, send invitations, and begin making logistical arrangements.

   The After-Action Review should be scheduled as soon as possible. Invitations should be sent to all participants. These invitations should clearly identify who is coming, what is happening, where it will occur, when it will occur, and how it will be conducted. RSVP should be requested. Logistical arrangements should begin as soon as this is accomplished. These arrangements may involve communications, housing, facilities, information management, supplies, feeding, transportation, and audio/visual support. Final arrangements for the event should be communicated to participants via a final coordination message. Invitees who are unable to attend should, at minimum, be afforded the opportunity to provide input through a guided written format.

5. Execute data collection and begin analysis.

   While the After-Action Review is the crown jewel of the collection effort, the data collection plan may integrate a variety of activities both before and after. These are executed according to the timetable in the collection plan.

Data Collection

Effective data collection is a core component of the After-Action Reporting process. Collection usually begins with generic activities, such as the Hot-Wash, that pull in as much data as possible. Initial analysis identifies trends, gaps, and follow-on questions. These are used to inform more targeted collection techniques. This process may be repeated with increasing specificity until analysis is complete. The following guidance will help in developing effective collection strategies and using proper techniques. Remember that the information collection activities after an operation can be as rigorous as those used to plan and support the response itself.

The collection plan is a useful tool for planners who are coordinating the After-Action Reporting process. The collection plan captures the purpose of an inquiry, the key questions to be answered, the data points necessary to answer those questions, and the methods to be used for gathering that data. They may also include timetables and task assignments for guiding execution. The formal use of such plans is essential during large After-Action Reviews that involve multiple persons and simultaneous activities. Ultimately, these plans minimize information gaps and duplicative efforts while increasing effectiveness.

Data collection should always be driven by questions. Collection without questions lacks specificity and creates mountains of useless data. Specific, open-ended questions provide focus and help filter results. The following list of questions is a strong core from which to begin an After-Action Report. It is likely that more questions will be developed as these questions are answered. For larger events, each organizational level, function, and activity may need to answer these questions separately before answering them as a whole. Key questions can be found in the table below. **See Appendix F for additional useful questions.**

Situation	*Why was a response operation initiated?*
Narrative	*What did we expect to happen? What was planned?* *What happened and when?* *Were Standard Operating Procedures deviated from? Why? What happened?*
Metrics	*What was done and how much?* *How many people participated? What roles were filled by whom?* *How much did the operation cost? What were funds spent on? What was the budget?* *Who did TR work with? Who provided support to TR?*
Successes	*What were the notable achievements and successes?* *What went well? What exceeded expectations?*
Problems	*What difficulties were encountered?* *What issues particularly slowed or hindered response operations?* *What circumstances did we have to adapt to?* *Were there any critical incidents/accidents? What happened and why?* *Were TR plans and policies implemented appropriately?* *Were any redundancies in process or action identified?*
Solutions	*How were the identified issues resolved?* *How can the problems identified be prevented in the future?* *What will we keep doing because it worked and was effective?* *What would we like to do differently next time?*

The data requirements necessary to answer these questions can vary widely between operations. Though specific examples are captured in the templates and formats provided later in this manual, they are not a complete listing. It is up to the planner to identify the data points necessary for telling the story of an operation, exploring the lessons learned, and identifying areas for improvement.

TR supports three formats for information collection: in-person, teleconference, and digital/written. Outside the Hot-Wash, in-person events are reserved for the largest and most complex operations. Group and individual teleconferencing, as well as digital/written formats (such as reports and surveys), are supported for all operations. There are pros and cons to each of these that should be weighed when developing a collection plan.

Format	Pros	Cons
In-Person	In-depth questioning and discussion. Participants can communicate clearly. Wide range of facilitation tools available. Allows high amounts of collaboration. Large group discussion and breakouts.	High cost to organization and participant. Requires skilled facilitators. Not good for collecting specific data. Cannot be repeated. Over-reliance on note-taking/recording.
Teleconference	Allows remote access at low cost. Repeatable and allows flexible timing, group discussion, and breakouts.	Dependent on technology. Heavily facilitated with a strict agenda. Small to moderate group sizes only.
Digital/Written	Participants have time to think on input. Deadline-based with schedule flexibility. Captures details reliably. Allows mass participation.	Collection tools require in-depth design. Reliant on writing ability of participants. Participation easier to avoid/delay. Organizing input requires a lot of resources.

Within these formats, there is a wide array of techniques that planners can use for collecting data. Best results always come from using a mix of complementary formats and techniques tailored to the data being collected. Successful choreography of these methods makes an After-Action Review an effective learning experience for both the organization and participants. The following list of techniques gives a brief overview of the tools available. More expansive lists, as well as detailed guidance on facilitation and research methods, can be found online.

Technique	Description
Group Discussion	Used during in-person and teleconference events to gather input from participants on common topics that are cross-functional or "big picture." Best results come from guided discussion using targeted questions derived from preliminary data collection. Time management and control of repetitive or off-topic discussion is imperative. The level of facilitation skills necessary depends on group size, contentiousness of topic, and desired specificity of results.
Break-Out Groups	In-person and teleconference technique that breaks full group into focused sections to discuss function-specific topics or defined cross-functional issues. Activity requires a targeted goal with deliverables. Each break-out group should get its own facilitator. Time management is critical when part of larger events.

Group Activities	An array of in-person facilitation techniques that make it possible for large groups to fruitfully participate in activities such as brainstorming, prioritization, and displayed thinking. Most techniques can be modified to fit specific data collection needs. Some can be adapted to work in the teleconference format. Requires moderate facilitation skills and thorough understanding of the activity.
Interviews	One-on-one events that seek to gather specific details or a general narrative from a single perspective. Useful for gathering information from technical specialists or gathering separate perspectives from event witnesses. Interviews can be run in-person or by teleconference. A high level of facilitation skill is required for eliciting the desired data. Data can be recorded via video, text, or transcript—though permission is required for the first two.
Surveys	A digital/written technique that seeks to gather specific data-points from a large audience. Works best when questions and answers are short and specific. Surveys are particularly good for gathering data for quantitative analysis. They should never be used as a stand-alone information collection technique. Can be useful both before and after AAR.
Reports	A digital/written technique that gathers large amounts of generic and narrative-based data from individual or small-group accounts. Formats should be provided to participants to keep dialogue concise and targeted. Formats also ease subsequent data processing and analysis. Useful for qualitative analysis of general events or gathering multiple perspectives on specific incidents. Potentially time consuming. Use should be deliberate and targeted.
Data Mining	Technique used for collecting and processing mass quantities of data from existing data stores. These can include existing reports, databases, trackers, etc. Useful for gathering numerical data, highlighting notable events, and establishing timelines. Technique frequently brings out topics in need of further investigation using other techniques.

So where does the After-Action Review sit within all this? Exactly where the Lead Planner thinks it will most benefit the after-action process. Unlike Hot-Washes, After-Action Reviews are in-depth explorations of events and issues at each organizational level. Reviews use their wider range of participants to generate more holistic analyses and content. The event's format is either an in-person or teleconference meeting. It should, at the least, include representation from all levels and functions of leadership involved in the response. Key external and internal stakeholders should also be present. With good facilitation, the event should provide closure to the participants, foster an in-depth exploration of key topics, and generate a variety of innovative solutions and improvements.

Analysis

Despite sounding somewhat mystical, analysis is fundamentally simple. It is defined as the act of breaking down complex objects in order to develop understanding. To this end, complex objects are broken into smaller elements using questions. Their answers provide data points and connections. The analyst's job is to sort, organize, and connect the dots; fill gaps through targeted questioning; and interpret the image created. To gain better understanding, analysts may re-arrange, alter, or add variables. The effects can help them understand relationships. These activities help turn data into useful information. All analytical techniques are fundamentally designed to accomplish these tasks. In the after-action process, analysis begins as soon as soon as the hot-wash notes are submitted and continues until satisfactory results are reached or the deadline for beginning report production passes.

For the purpose of TR's After-Action Reporting, there are four keystone questions: what happened, what went well, what did not go well, and what improvements can be made? All of these questions are fundamentally connected. When their answers are examined together, a rough picture of the whole event forms. This outline can be filled using tactful clarifying questions that draw out specifics like "who," "what," "when," "where," "why," and "how." Reconciling conflicting answers, linking the results, and inferring their implications is the most fundamental form of After-Action Analysis. For small operations and problems, this may be all the analysis that is necessary. For larger operations and complex problems, these questions will always provide the foundation for deeper exploration. **See the Hot-Wash and Data Collection sections for sample variations on these questions.**

One simple method for deeper exploration is Root Cause Analysis (RCA). This is a method by which one can identify the base variables that cause an event, good or bad, to occur. A simple technique for conducting a basic RCA is to ask "why" until it cannot be asked anymore. Challenging answers like this breaks the data down to its most elemental parts. This allows the event to be fully understood for documentation, replication, or mitigation as appropriate. Remember that the question "why" rarely returns with a single answer. Instead, responses usually include multiple points that branch in different directions. Each of these branches must be followed up with another "why." Knowing when to stop this line of inquiry is important. The analyst must always seek the best and most functional answer without wasting excessive time or effort. **See Appendix F for additional questioning for deeper analysis/exploration.**

Errors in the disaster response world tend to be costly. They can result in fatalities, serious injuries, shattered relationships, damage to an organization's reputation, or broken equipment. Determining the causes and mitigations for these errors is essential. Since most errors do not have a single cause, RCA tends to produce an array of situational, material, human/user, and procedural factors. Of these, user and procedural error are the most frequently confused. User error (the human) is often blamed over process error (the method). To prevent this confusion, careful questioning is necessary. Did a procedure exist and was the user aware of it? Was the procedure adhered to? Does the procedure account for the conditions and variables that were involved? Do gaps exist within the procedure or accompanying guidance that can cause error? Can another person, in the same situation, repeat the error? Is it possible to alter the procedure to eliminate or reduce opportunities for error? If the answers to these questions tend to point towards the procedure, chances are that its design was flawed—not the person using it.

Another important analysis activity is the examination of successes and innovations. These form a significant part of the lessons learned from an operation. However, there is a tendency for people to gloss over or blindly accept them. Understanding why an event or action was successful can provide positive confirmation of existing methods, suggest modifications, or guide future adaptations. It also allows one to differentiate between successes caused by design and those caused by blind luck. Picking apart innovations, successful and failed, also provides a wealth of information. Failed innovations can provide new ideas, feedback data, and sometimes, with minor modification, brilliant improvements. Successful innovations must be scrutinized in order to separate singular situational adaptations from universally applicable refinements before mass adoption. Blindly accepting and adopting innovations can easily turn a current victory into a future defeat. Moral of the story: examine successes and innovations as thoroughly as any problem or accident!

With so many tasks involved, After-Action Analysis requires effective project management. The most consistent point of failure in this regard is resource management. Analytical activity can easily siphon significant time and energy for attacking the most insignificant problems. Effective management starts with effective preparation. A solid foundation can be set by specifying and prioritizing tasks, assigning resources, and creating timetables before kick-off. Progress monitoring, deadline enforcement, and adaptive resource allocation can keep the effort on track once it begins. However, success also requires awareness and diligence from every participant. Individuals participating in the process must always be aware of the time and energy they are expending on a task. They should be ready to recognize when help is needed or "good enough" has been achieved. The target of analysis effort should always be to provide the best product possible without exceeding the resource constraints provided.

It is beyond the scope of this manual to explore all the tools, techniques, and concerns of analysis. However, planners are encouraged to become fluent in analytical methods. This includes developing a complete understanding of the analytical process, the qualitative and quantitative tools available, and the effective reporting of results. Project management methods are also useful. A planner's grasp of these is very evident in the final product. The more techniques a planner has in their toolbox, the better prepared they are for designing after-action data collection and tackling complex problems.

Report Production

The After-Action Report is the final home for the information and conclusions generated through analysis. When creating the report, focus on clearly and succinctly communicating critical ideas to the target audience. Reports should use as little jargon as possible, define acronyms, and stick to the facts. The narrative, data, and conclusions must be presented in a logical flow that is understandable and facilitates action. It is worth remembering that TR After-Action

Reports are often widely disseminated to supporters, sponsors, donors, and partners. Content should be developed with this in mind.

This manual provides several templates for use in building the After-Action Report. While the templates provide both structure and formatting, the outlines only provide structure. This is designed to provide writers flexibility in handling the complex reviews that come with larger operations. All final reports should adhere to the brand guidelines published by TR's External Communications department. Document templates and pre-made formatting can be found through the Operations Planning Associate and the External Communications department.

Graphics, images, and maps are crucial components for illustrating the story told in an After-Action Report. Reports without some form of illustration, especially a map, are difficult to understand. However, each illustration should have a targeted purpose that adds to the overall story. Condensing maps, removing redundant images, and ensuring graphics highlight critical components are important for keeping the report uncluttered and on-target. Ensure that images are used with permission and are representative of the complete picture.

The final After-Action Report should be reviewed for structure, formatting, and language before submission. It is highly recommended that the report be reviewed by at least one person not involved in the operation or the review process. This will provide fresh eyes and ensure that the final product is digestible for outside observers.

Review and Implementation

Report completion signals the time for presentation and implementation. The completed report is uploaded to the appropriate Operation Folder and sent to the operation's ICs/TFLDs, State and Regional leadership personnel involved in the response, as well as National EOC staff. At the same time, the Lead Planner schedules a final presentation. Invitees should include the aforementioned leaders. The event is held via teleconference, unless otherwise directed by the Director of Field Operations, and facilitated by the Lead Planner. Once the results are presented and discussion is complete, the meeting should refocus on implementing improvement points identified in the report.

Improvement points in the After-Action Report are recommendations for action, adjustment, and development that are expected to improve operations. Identifying exactly how to implement these ideas, who should do so, and when they should be done is part of developing an Improvement Plan. This plan is the final piece of the After-Action Reporting process. Participants determine the improvement points to be implemented and discuss the best way to implement them. Then, each action item should be triaged to determine priority and who should be in responsible for implementation. Using the prescribed triage process **found in Appendix B**, priority is based on level of organizational risk and the resources necessary to implement. Responsibility is assigned based on whether alteration of standards or execution is necessary. The results of this discussion are captured by the Lead Planner in a format with deadlines and reporting requirements. The resulting Improvement Plan should be submitted to the parties mentioned within, their supervisors, and the applicable Operation Folder alongside the final After-Action Report.

Implementation of improvement points can take anywhere from several days to a year depending on priority, resources assigned, and complexity. Improvements are implemented during the "Phase 0 – Preparedness" component of TR's Emergency Operations Plans. Regional Administrators are responsible for supervising improvements assigned to Regional personnel, and the DDR supervises implementation involving NATIONAL EOC staff.

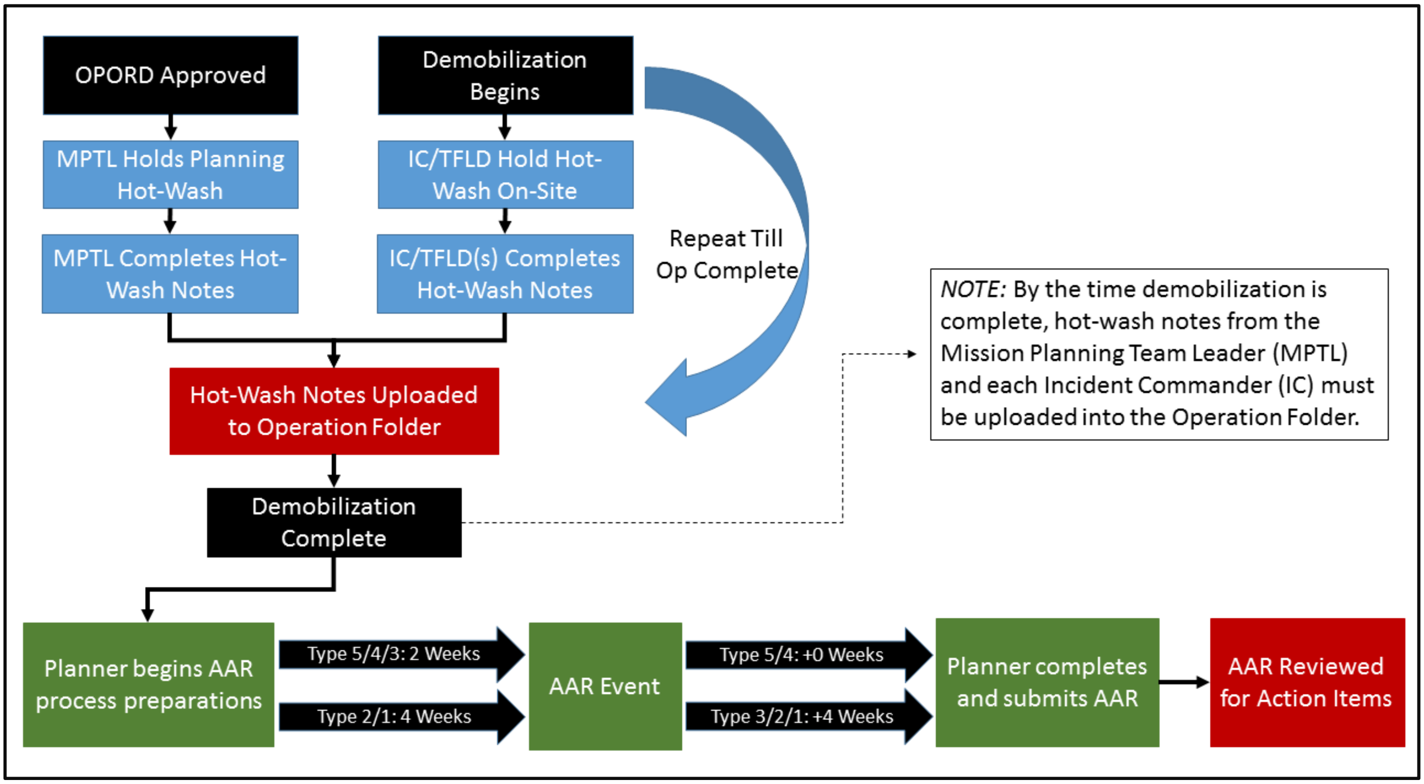
APPENDIX A: OPERATION TYPING IMPLICATIONS ON AFTER-ACTION REPORTING

In order to standardize TR disaster relief operations and ease the administrative requirements for smaller operations, all disaster operations are categorized as Types during initial planning. The resulting designation refers only to the scale of TR's response and may be adjusted to reflect changes therein. Operation Types are organized into five categories, Type 5 being the smallest and Type 1 being the largest. Typing directly impacts the After-Action Reporting process by specifying deadlines, tools to be used, and resources available. The following table outlines these in detail. Questions about Operation Typing and its implications on After-Action Reporting should be directed to the Operations Planning Associate.

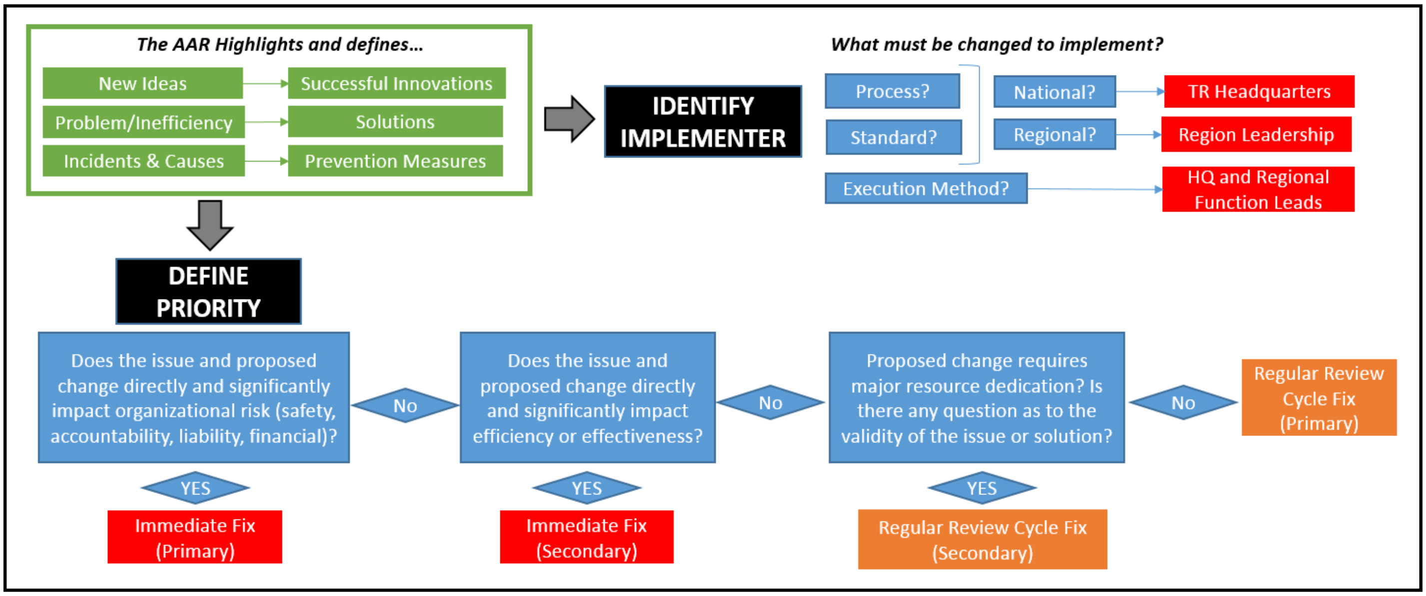
OP Type	Review Deadline	Review Format Supported	Report Deadline	AAR Template?
Type 5	2 weeks after DEMOB	Tele-conference (TC)	2 weeks after DEMOB	Small OP AAR Template
Type 4	2 weeks after DEMOB	TC	2 weeks after DEMOB	Small OP AAR Template
Type 3	2 weeks after DEMOB	TC or in-person at Region	6 weeks after DEMOB	Large OP AAR Template
Type 2	4 weeks after DEMOB	TC or in-person at NATIONAL EOC	8 weeks after DEMOB	Large OP AAR Template
Type 1	4 weeks after DEMOB	In-person at NATIONAL EOC	8 weeks after DEMOB	Large OP AAR Template

APPENDIX B: PROCESS DIAGRAMS

After-Action Reporting Process



Improvement Point Triage Process



APPENDIX C: SAMPLE AFTER-ACTION REVIEW AGENDA/PLAN

**This is the original proposed AAR agenda for Operation Starting Gun*

Operation Starting Gun After-Action Review Agenda
Logistics Needs & Schedule of Events

Date: July 17th and 18th, 2013

Location: TBD (require seating room for 25 at table arranged in a semi-circle)

Supplies Needed:

- Computer (3) (1 for AV, 2 for taking notes)
- Projector w/projection screen (1x)
- Extension cord/surge protectors (2)
- Tables (with seating for 25)
- Seats (25)
- Extra Pens
- Notepads
- Sticky Notes
- Disposable Cups
- Mints/Jolly Ranchers
- Coffee Supplies & Machine

Personnel: Requires 2-3 facilitators on Day 1 & 4 facilitators for Day 2

Schedule of Events:
Day 1: Strategic Level Debrief

- Opening Comments ([redacted])
- Ice-breaker / Team Building Activity
- Data Collection Activity 1 (Facilitated by [redacted] + data collector)
  - Each of the participating TR Personnel will provide 5 things that TR did well, and 5 things that TR did not do well via a provided Google Form for each of the response phases (Activation, Initial Response, Expanding Operations, Regularized Operations, and Demobilization).
  - Facilitator will provide a description of each phase, noting context within Operation SG's events timeline, while guiding participants towards the various topics that they should focus their commentary on. Emphasis should be placed on gaining commentary on broad, strategic type trends, decisions, events, and activities that occurred during the mission. Powerpoint may be used to illustrate. Time needs to be provided for participants to develop and submit entries.
- Break (30 min - 1 hr) data collation, redundancy elimination, and display
- Discussion for Activity 1 (Facilitated by [redacted] + 1 other facilitator)
  - Facilitators will lead group in an activity to rank the top ten items in need of improvement for each of the given response phases. A moderated discussion will then be guided by the facilitators to brainstorm potential improvements/solutions for each of these items. Note-takers will be necessary to document important points from the discussion. Discussion of improvement options should be kept brief and positive.
  - A 5 minute break should be provided between each response phase discussed.
- Questions, Comments, and Final Thoughts for the day

Day 2: Field Operations Debrief

- Overview of Schedule/Events of the Day
- Breakout Group Session 1 (General Management and Field Ops - 4 facilitators)
  - Participants will be broken into two groups to review the general incident management flow of the mission and execution of field activities. Both discussions will be facilitated.
    - General Incident Management: This group will utilize the Incident Management Capability Evaluation Guideline to discuss and review TR's execution of ICS- based incident management during the operation. Additionally, they will discuss the various general management issues that arose during the mission and how to address them in the future. This group must be carefully moderated.

- Field Activities: This group will conduct a rapid SWOT analysis of our execution of field tasks and activities to include: expedient roof repair, building demolition, muckouts, mold prevention, work assessment, and worksite safety. They will then be directed to build out a series of lessons learned, best practices, and points for improvement for the execution of each.

- Break/Lunch (1/2 - 1 hour)
- Breakout Group Session 2 (Incident Management Detail - 4 facilitators)
  - Participants will be broken into groups to represent the functional sections of the incident management structure (operations, logistics, planning, and command staff - finance omitted since none of the people who held the position will be present). Each group will be directed to conduct a rapid SWOT analysis, followed by an in-depth discussion and documentation of lessons learned and best practices.
- Closing Events (thanks & final comments)

*NOTE: At all events, participants will be directed to produce documentation of their efforts. This documentation will be collected and utilized for final development of the OSG After- Action Report

NOTE: *SWOT Analysis is an analytical method for evaluating the soundness and context of activities, projects, organizations, etc. SWOT achieves this by examining strengths, weaknesses, opportunities, and threats.*

APPENDIX D: AAR TEMPLATES

Note: *Templates are regularly updated. View and download them here: https://teamrubiconusa.box.com/OpsTemplates*

After-Action Report Template for Small Operations

TEAM RUBICON
BRIDGE THE GAP

After-Action Report

Operation Name – Area of Interest (Locality, State, Country)
Prepared by: Name – Position (if applicable)
Month DD, YYYY (##:## Hours)

Operation Data Overview:

General Data	
Operation #	TRYY### (See Op Folder Title)
Dates	(mm/dd/yy) to (mm/dd/yy)
Duration	### Days
Location	Locality, State, Country
Regions Involved	#, #, #, #
States Involved	State Abbrev, Abbrev, etc.
Personnel Data	
Total TR Volunteers	###
Total Vol. Hours	###
# Veterans	###
# First Responders	###
Est. Community Impact ($)	###
Operations Data	
Total Assessments	###
Total Work Orders Gathered	###
Total Work Orders Completed	###
Total Non-TR Vols. Managed	###
Total CuYd Debris Moved	###
Other Metrics (Delete if Unused)	###:N/A
Other Metrics (Delete if Unused)	###:N/A
Total Accidents/Incidents	###
Interagency Collaboration	
Government	• Agency Name or N/A • + Agency Name • + Agency Name
NGOs/VOADs	• Org. Name or N/A • + Org .Name • + Org. Name
Partners	• Partner Name or N/A • + Partner Name • + Partner Name

Summary of Events:

Instructions: Briefly describe the key events of the operation as it evolved from initial incident detection to final demobilization in the space provided. Delete these instructions before submitting. The example paragraphs below are 100 words apiece for reference.

Anticipation and Response:

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Operations:

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Stabilization and Transition:

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BRIDGE THE GAP

Analysis

Notable Achievements:
• Achievement 1 • Achievement 2 • Achievement 3 • Achievement 4 • Etc.

Key Lessons Learned:
• Lesson 1 • Lesson 2 • Lesson 3 • Lesson 4 • Etc.

Problems and Solutions:

Problems and their recommended solution identified during the after-action review are described below. Under the Area column, please identify if the comment relates to Emergency Operations Center/Mission Support activities (EOC/MS), Incident Management (IM), or general/specialized field tasks (Field). Add rows as necessary.

Area	*Problem/Difficulty*	*Description*	*Recommendation*
EOC	Internet Connection	Unable to achieve cell and internet service at ICP and in the field.	Check wireless access and identify facilities/resource that can overcome lack of cell-reception pre-deployment.

Improvements and Innovations

Innovations and ideas for improvement identified in the after-action review, that are not associated with problems or difficulties encountered during the operation, are described below. Under the Area column, please identify if the comment relates to Emergency Operations Center/Mission Support activities (EOC/MS), Incident Management (IM), or general/specialized field tasks (Field). Add rows as necessary.

Area	*Improvement/Innovation*	*Description*
IM	Training on Stand-Down Days	Use stand-down days for giving OJT to both incident management and field personnel

2

After-Action Report Template for Large Operations

TEAM RUBICON
BRIDGE THE GAP

After-Action Report

Operation Name – Area of Interest (Locality, State, Country)
Prepared by: Name – Position (if applicable)
Month DD, YYYY (##:## Hours)

Executive Summary

General Data	
Operation #	TRYY### (See Op Folder Title)
Dates	(mm/dd/yy) to (mm/dd/yy)
Duration	### Days
Location	Locality, State, Country
Regions Involved	#, #, #, # or Delete Row
Personnel Data	
Total Deployed Volunteers	###
Total Remote Support Volunteers	
Total Vol. Hours	###
# Veterans	###
# First Responders	###
Est. Community Impact ($)	###
Operations Data	
Total Assessments	###
Total Work Orders Gathered	###
Total Work Orders Completed	###
Total Non-TR Vols. Managed	###
Other Metrics (Delete if Unused)	###;N/A
Other Metrics (Delete if Unused)	###;N/A
Total Accidents/Incidents	###
Interagency Collaboration	
Government	• Agency Name or N/A • + Agency Name • + Agency Name • + Agency Name • + Agency Name
NGOs/VOADs	• Org. Name or N/A • + Org. Name • + Org. Name • + Org. Name • + Org. Name • + Org. Name
Partners	• Partner Name or N/A • + Partner Name • + Partner Name • + Partner Name • + Partner Name • + Partner Name

Operation Overview

Anticipation and Response:

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Operations:

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Stabilization and Transition:

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Notable Achievements:

- Achievement 1
- Achievement 2
- Achievement 3
- Achievement 3
-

Key Lessons Learned:

- Lesson 1
- Lesson 2
- Lesson 3
- Lesson 3
-

1

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Operation Narrative:

Instructions: Describe the key events of the operation as it evolved from initial incident detection to final demobilization in the space provided. Delete these instructions before submitting. Use no more than one page.

Anticipation:

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Response:

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Operations:

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Stabilization

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Transition:

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Analysis: *Problems and Solutions*

Instructions			
Problems and their recommended solution identified during the after-action review are described below. Under the Area column, please identify if the comment relates to Emergency Operations Center/Mission Support activities (EOC/MS), Incident Management (IM), or general/specialized field tasks (Field). Add rows as necessary.			
Area	***Problem/Difficulty***	***Description***	***Recommendation***
EOC	Internet Connection	Unable to achieve cell and internet connection at ICP and in the field.	Check wireless access and identify facilities/resource that can overcome lack of cell-reception pre-deployment.

Analysis: *Innovations and Improvement Points*

Instructions		
Innovations and ideas for improvement identified in the after-action review, that are not associated with problems or difficulties encountered during the operation, are described below. Under the Area column, please identify if the comment relates to Emergency Operations Center/Mission Support activities (EOC/MS), Incident Management (IM), or general/specialized field tasks (Field). Add rows as necessary.		
Area	***Improvement/Innovation***	***Description***
IM	Training on Stand-Down Days	Utilize stand-down days for providing OJT for both incident management and field personnel

3

APPENDIX E: AFTER-ACTION PROCESS CHECKLISTS

Hot-Wash Checklist

- Determine time and location for Hot-Wash.
- Identify and invite participants.
- Make logistical arrangements.
- Conduct Hot-Wash.
- Finalize and upload hot-wash notes.

After-Action Review and Reporting Checklist

- Conduct initial review of hot-wash data.
- Determine the data collection requirements.
- Develop a collections plan.
- Determine After-Action Review format.
- Conduct project planning for analysis:
  - Identify after-action deadline, goals, constraints, and resources available.
  - Identify and prioritize project tasks.
  - Set task-specific deadlines and milestones.
  - Assign resources to tasks.
- Identify and recruit helpers:
  - Logistician, A/V or IT, Facilitators, Analysts, Recorders.
- Identify key stakeholders and participants:
  - TR leadership, TR responders, government agencies, partner organizations.
- Schedule After-Action Review, send invitations, and begin making logistical arrangements.
- Execute data collection and After-Action Review.
- Begin data analysis.
- Build and finalize report:
  - Organize information.
  - Develop illustrative graphics and maps.
  - Review and finalize.
  - Submit report.

APPENDIX F: ADDITIONAL QUESTIONS FOR GUIDING ANALYSIS

Examining Performance:

- Recognition
  - When was the event/problem/issue/pattern realized and by whom?
  - Were there indicators? What were they?
  - Was there information in the plan that indicated/forewarned of the events?
- Situational Awareness
  - Who was aware of the situation and who was not?
  - How was the situation communicated?
  - Did different personnel perceive the situation differently? Why?
  - What was the reality of the situation?
  - How were information gaps filled? What resources were used?
- Option Development
  - What were the potential options available? What options were considered?
  - How effective was the selected option or options?
  - What was the reasoning that led to the final decision? Was it valid?
- Risk Assessment and Analysis
  - Were the critical risks identified? How? Why not?
  - Were the risks weighed? How? Were they weighed appropriately?
- Action
  - Was the action to be taken communicated in an effective, clear, and timely manner?
  - Was the technical execution to standard? Were there deviations from the standard?
  - How successful was the action at achieving the desired result?

Identifying and Analyzing Errors/Problems/Barriers:

- Were there unanticipated barriers? Interpersonal barriers (communications, perception of attitudes)? Individual barriers (stress, fatigue, exhaustion, attitude)?
- Did the team recognize changing environmental factors or indicators for heightened alertness?
- Did people recognize it when it occurred? What actions allowed the event to be mitigated? What happened that prevented effective mitigation?
- Was the situation communicated to all affected personnel?
- Was action taken? Was the strategy deployed effective? Were there indications that the course of action should have been reconsidered? Were there indications that supported the strategy? Were these strategies/courses of action in the plan?
- Were there times when personnel were out of contact or unsure of the big picture? What factors contributed to this? What practices helped keep personnel on the same page?
- Were there external factors that helped or hindered the effort? How did the team respond to these factors? Was it possible to anticipate the change? Why?

Identifying Successes and Innovations

- Were situations sized up correctly? Were potential dangers noticed and communicated immediately? Was a maneuver or action executed exactly as planned or taught? Did someone have a good or interesting idea/opinion about how to handle an emerging situation?