Critical Moments Reflection Methodology

A Reflective Method and How to Use it with Groups of People

A brief introduction of the Critical Moments Reflection Methodology, a method for retrieving lessons from the experience. Originally developed by Ceasar McDowell, this version of the methodology was adapted for being less time requiring. It can be applied with groups of 5 to 15 people with very great effectiveness.

Introduction

Reflecting on ones practice is an old principle of wisdom in all cultures. However its organization as a systematic activity is very recent. John Dewey, one century ago, and Donald Schön, in the 80s are probably two of those authors that more contributed to its recent development. Reflecting on practice (that means reflecting after the practice) is a process of retrieving past activities and situations to open mental space and have time to look them in a more analytical way. It requires the reconstruction and reinterpretation of the experience illuminated by its results. The first task is to bring the experience back to mind. Once we have done that it can be reviewed and analyzed carefully.

Reflection is based on the hypothesis that as we live we learn, but that most of what we learn is embedded in our experience. Most of our learning is tacit and manifest itself as skills, feelings, reactions, preferences, intuitions and attitudes. It is currently understood that most of the knowledge we acquire through experience remains as cognitive components of our actions and emotions, behind our level of conscience. If our lives are marked by urgency, our minds go from one issue to the next one, changing its focus frequently, with not much time for processing what we have just finished to do and learn. The knowledge acquired is stored in some part of memory almost at the same time and in the same form it was acquired. The knowledge acquired with the experience remains, in memory as an element of the action, as part of our past or as a current skill, but not as a conscious and active actor in our minds. This knowledge is not definitively lost; it is there, but it is invisible, in some part of our brain. If required by any circumstance that knowledge can be called back, applied for carrying out a practical action or for use in a reflective activity.

This methodology of reflection was created as a method for stepping back into the experience, retrieving the knowledge acquired in previous times for using those findings for re-analyzing the experience, rethinking its meanings and renew our thinking. It is based on the hypothesis that tacit and explicit knowledge from experience can be retrieved.

The Critical Moment Reflection Methodology performs a triple task:

- It rescues the knowledge acquired through the experience, both the conscious knowledge and the not-so-conscious knowledge (tacit and semi-tacit knowledge).
- It enables a group of people to share their perceptions and combine the individual knowledge of its members in an enhanced image of the whole experience, and
- It carries on an activity of rethinking the meanings of the experience, extracting lessons that can be useful for the future.
The Knowledge People Have

The learning process at daily life, under naturalistic conditions, is characterized by urgency, complexity, constant change and unpredictability. The rhythm of activities is paced for the constant arrive of new situations and problems that require immediate attention and solution. Like the rabbit of “Alice in the Wonderlands” we live hurried almost all the time.

The knowledge acquired is stored immediately but there is little time and mental space for re-examining the experience and for figuring out explicitly what is being learned. The task of connecting its particular meaning with a bigger interpretative framework, most of the time, is postponed toward some other moment in the future. In the spot of the action surprises happen and very good questions pop up in the mind, but as time goes on and the mind focuses on new problems, the questions begin to become paler and tend to disappear from the conscience.

The result is that most of the learning that people achieves in their daily life remains accumulated mostly as experience, skills, feelings and intuition, but not as articulated ideas.

Although this practical knowledge is very important its tacit condition presents important limitations (1) for testing it, (2) for constructing new knowledge on it and (3) for sharing it. It is invisible for its owner and very difficult to communicate. It exists embedded in the experience itself and in the actions people do after the experience, and its cognitive condition makes it hard to access and use for constructing new knowledge and for submitting it to critical scrutiny. Most of its assumptions remain unchallenged for long periods of time, despite of abundant evidence of their weaknesses.

One way of stimulating their professional development and strengthening professional teams and community groups is by helping them to uncover the knowledge residing in their experience. The retrieving of the experience of its members enriches the asset of knowledge of each member of the group, and makes the sum of individuals’ experience a shared resource for the whole group. It can also contribute to people to be aware of how they think in action and be more adaptive.

The visibility, by the group, of the experience and reflections of each one of its members enables all participants to establish a dialogue between his own experience and those of the other members and to generate his own synthesis of all these elements. What you have at the end of a reflective process is not only a sum of retrieved knowledge of each one, but also a sum of the syntheses that each one has made from the knowledge of them all. This sum of syntheses can work as a new platform for future actions of each one of its members and for the group as a whole.

The knowledge that was invisible and fragmented in the minds of each member, before the reflection session, is made visible and enriched by different perspectives, it is visible to its owner and to everyone else and a new synthesis of syntheses emerges inside the group. No doubt that the ownership of the group on his new knowledge is now stronger than before and that now the group can make a better use of the experience of its members.

The other change the knowledge of group has had is that now it is not only a part of the past of the group, it is not only an assumed and unconscious belief at the individuals’ mind but a living element that can be critically discussed and submitted to the verification of practice. This new condition of its knowledge enables the group to construct upon it in a systematic way and it can be used for creating new products that contains that knowledge and can be used by the group in future actions, plans, manuals, strategies, policies, and so on.
Once the knowledge is made explicit, and has the form of a visible object, it can be documented and shared more easily with new members of the group, with new generations, and with other groups who are facing similar situations or are interested on similar issues. This new knowledge can be used also to establish new alliances with other groups. In synthesis the group owns a new resource highly useful for reaching its objectives and development.

**The discourse and the Experience**

The discourse about the experience does not always fit the experience itself. The discourse is a smoothed version of the experience. In most cases the discourse on ones practice generalizes partial aspects of that practice and loses many elements of its complexity. Most of the time, the discourses about the experiences are greatly influenced by the requirement of other actors, with whom the organization or the professional needs to negotiate for surviving. For answering to those requirements people frequently construct official discourses that over simplify their experiences.

Frequently there are many areas of conflict between the discourse and the practical experience. In those cases the discourse may make invisibles those areas, avoiding treating them. The areas of conflict disappear from the discourse. And once they are hidden it is very difficult to treat them publicly. The problem is that the official discourse works as a paint that covers the nuances of the experience.

A good way for a group to learn is to forget the discourse for a while and to step back through the experience for facing the issues of experience more directly, for focusing their intelligence in deciphering these issues of practice.

Once these practical issues are better understood they will require, and drive, a new explanation for that experience. The dialogue between the discourse and the logic/patterns found in the facts of the experience will make possible to achieve a new understanding of the experience and to renew the discourse. At large this dialogue will make the discourse much more consistent and fine-tuned with the experience.

**The Critical Moments Reflection Methodology**

For helping groups of people to tap on their resources of knowledge, Cesar McDowell has developed the original version of the Critical Moments Reflection Methodology (CMRM) and, after him; some other members of CoLab have been developing new ways of applying it in shorter processes. CoLab believes that the greater consciousness and visibility of the learning generated in
the groups of people will allow leaders and practitioners to improve their practice and achieve their objectives more effectively.

**The main outcomes**

People who have gone through the critical moments reflection process report that it has allowed them to gain clarity about their experience, the rethinking of their ideas, the visualization of the methods they use for doing their work, and the hidden theories, beliefs and assumptions that guide their work. In the cases where the CMRM were applied the reflections made by groups generated important processes of transformative learning for them:

1. The group acquires a new perception of the experience, enriched with the perceptions of each one of its members.
2. The process generates basic awareness of tacit learning that has taken place by people as doing their work, and makes this knowledge a shared resource of the group.
3. The reflection process usually extended and deepened the learning from experience, permitting the group to discover new facets of its context.
4. People sharpened and clarified their questions about their work, their conditions and their ideas and/or find new questions to begin a new explorative journey.
5. The process led to developing connections across individual experiences and to integrating the meanings from different perspectives on those experiences.
6. People developed more complex understandings of what happened, why it happened and what led to it.
7. In many cases the process of reflection has had a meaning of self-healing, both for the individuals as for the mutual relations in the group.

The level of achievement of these outcomes depends on the moment the group is living and on the capacity of the facilitator to help the group to go through the process.

**The process of the method**

The Critical Moment Reflection Methodology constitute of four basic steps:

1. Inquiry Questions
2. Critical Moments
3. Timeline
4. Analysis and Storytelling

The sequence of these steps has logic:

1. The method starts formulating questions (Inquiry Questions) about the experience; about those aspects that we would like to understand better for improving
our practice.

2. Having these questions in mind we go back and uncover the moments of the experience (Critical Moments) that can contribute to answer the questions. At the end of this step we have the experience as a set of brief descriptions, like talked “photos”.

3. Once we have the critical moments we organize them in a timeline of the experience. With the timeline we can see the experience as a collection of “photos”, at the same time, we have a more complete perception of the experience by combining the perspectives of all participants.

4. The final step is a combination of storytelling and analysis that enables the participants to discover lessons from the experience, and answers or partially answers to the inquiry Questions.

The requirement of time for going through this process may vary from two hours to two days, depending of the complexity of the experience and of the group who is participating in the process, the level of analysis the group wants to do, and of the skills of who is in charge of facilitating the reflection process. Some of these exercises can be done in two sessions of one hour each, if it is adequately prepared beforehand (see Two Hours Reflection).

**Cognitive Tools**

For making an analogy of the cognitive tools of the methodology with the tools we use in the physical world, it is possible to identify four of these tools. A necessary caveat here is that any analogy between these tools, most of them mechanical, and the elements of the cognitive world is only partially adequate. Their purpose is to help the reader to imagine how they can works and to figure out the kind of processes the methodology is trying to carry on. However, in the abstract level where these cognitive tools operate things are a bit subtler than in physical world.

These cognitive instruments are:

- **The Compass.**

  Questions work as the compass that will guide all the participants in their journey of stepping back through their experience for finding useful knowledge and for organizing the effort of analysis and synthesis. The travelers don’t have a map of the way through the past but for avoiding getting lost they have a compass. The Inquiry Questions work as their compasses.

- **The Lantern.**

  The Critical Moments will work as elements that throw light on the memory and illuminate the walk of the participants through their past. The Critical Moments work as visible elements that enable the participants to unearth the chain of events related to these moments, and for visualizing causalities among these events. The sum of Critical Moments, in a timeline, will work as collection of photos of the most important elements of the experience.

- **The Brush.**

  The description of the Critical Moments and the storytelling are similar to painting a scene, using the narrative as a brush. As the listeners listen to the storyteller they create their own image of the story. It is like if each one had his own brush and his own canvas and was painting their picture under the inspiration of the storyteller. The stories, have
double meaning, it helps the storytellers to remember their experience and helps the listeners to create/enrich their images about that experience.

- **The Lenses**
  Throughout the process the participants need to deep into the facts and analyze them. These efforts for looking at the details or the whole picture of the experience are the lenses of the reflexive process. The lenses will be used to examine better some elements to improve the understanding of the experience: the analysis and synthesis is done throughout the process but is more intense during the final sessions.

**Inquiry Questions**

The Inquiry Questions gives a sense of direction to the learning process; the main ideas people should bear in mind throughout the reflection. Its cognitive function is related to the process as a whole. Defining the Inquiry Question people specify the difference that the learning process should means to all parts participating in it, direct or indirectly.

The Inquiry Question will bring two main contributions:

- It will be the reference for searching the Critical Moments. (The Critical Moments will be searched in function of their contribution for answering these questions.)
- It will orient the analysis and the telling of the story. (The main purpose of the analysis is find elements that are useful for answering the Inquiry Questions)

The process of formulating the Inquiry Questions has two main functions:

- **To build bridges among participants:** The formulation of the Inquiry Questions by each participant, their sharing among the group, and the process of selection of the most relevant Inquiry Questions create bridges among the participants. In the dialogue for selecting the best inquiry Questions they discover the issues that others are interested in, the elements they have in common in their concerns and interests. This dialogue strengthens the sense of group membership among the participants.

  **Examples of Inquiry Questions**
  1. What value added have we brought to our main partners with our participation in the project?
  2. Which were the main factors that made the experience successful?
  3. Which situations put the experience at risk and how can we prevent them in the future?

- **To group the Critical Moments:** Each Inquiry Question is the reference for grouping and for selecting the Critical Moments that will be analyzed through the next phase. Indeed the way people relate the Critical Moments with the Inquiry Questions can be the starting point for some analysis.

For the facilitator, the Inquiry Questions constitute a highly useful map of the areas of interest of the participants, the concrete issues they are dealing with and the particular way they perceive them. The Inquiry Questions reflect the particular ways people are connecting the practical issues of their experience.
The Inquiry Questions should be formulated as brief phrases, between 10 to 20 words, in index cards. Each person should write down 2 to 3 questions. This activity of writing the questions should be private for not being influenced by others perspectives. It is important for capturing the interests and perspectives that are particular to each participant. Once the questions are written the card should be processed in a wall or board, grouped by similitude. Once grouped, the participants should vote for the 2 most relevant for improving practice. The two or three (card or groups of cards) most voted should be selected for the exercise of reflection. If a group of card were selected, it would be necessary to write the question that synthesizes the questions in the group of cards.

Frequently, the Inquiry Questions as a whole constitute an agenda of the issues people perceive that are challenging their main activities. After the reflective process, many of these Inquiry Questions may be used for orienting the effort of expanding the frontiers of the work of the group or organization.

**Critical Moments**

The use of Critical Moments for retrieving an experience has a cognitive base. Human memory organizes their records around those moments that were lived more intensely. Around those moments there is a great quantity of facts and images clearly recorded and easily accessible, without much effort of remembering. Some times, if life is threatened, the brain records the facts like a movie in slow motion condensing a great quantity of facts in a few seconds of the experience. People who have suffered accidents or have faced extreme situations can describe the evolution of the facts as if they had endured a much larger time than they indeed did have lasted.

To retrieve information about the past in the areas around those Critical Moments is highly effective. People are able to remember those Critical Moments and many other events that are related with them. To organize the search of information around the Critical Moments is also effective for avoiding getting lost in the midst of myriads of irrelevant details about the experience.

The retrieving of the Critical Moment illuminates an area of the experience around them, and allows the recovering of many other facts that are connected with them. The retrieval of the Critical Moments is an affective way to reconstruct an experience piece-by-piece, based on perceptions recorded in the memory of people.

In general, the Critical Moments are connected with significant changes in the process of the experience and, in many cases, with some special changes. Critical Moments are identified from the perspective of the participant. They reflect the particular way each individual perceived the experience. It should represent the meaning that an event acquired for a particular individual. They don’t try to represent the experience as a whole; they only reflect the
perspective of one person. It is the sum of the perspectives of all individuals what will generate a more complete image of the experience.

Those events can be:

- The emergence of threats,
- The happening of surprises (good or bad),
- The emergence of a difficult problem
- The solution of that difficult problem
- The visualization of new futures,
- The disturb of a strong believe,
- The achievement of a desired objective.
- The change in a key component of the context.
- Etc.

Emotions also play a key role in the retrieving of the experience. As people remember their Critical Moments, the emotions associated with those Critical Moments also come up in the mind, and those emotions make easier to remember other facts, in some way, related with the Critical Moments.

Critical moments can be written in index cards as brief phrases of five to fifteen words, describing the event it is referred to. Critical moments should be written as headlines of newspapers when referring to real situations. For example: “The UCA University decided to ally with “X” around environmental issues”, “Calamanco’s local government refused to approve the hydroelectric project”, “The approach we brought showed initially adequate to deal with the problem”, “The Credit Union started its operation”, etc. Each Critical Moment should have the date it happened and a signal indicating, how it was perceived by its author, positive (+) negative (-) or neutral. Behind the index card the author should put his name, for future documentation.

Because the phrases of Critical Moments need to be short, they always need complementary explanation. Their authors will do these explanations orally during the activity of presenting them to the group and start constructing the timeline. These very brief explanations will be key for understanding the critical moment and the context where it happened.

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1 Individual experience is one of the most reliable sources of information. They reflect the perceptions of a witness who have observed the experience directly, and frequently lived it personally. Most of the time it is not only a fragment of data but also sequentially consistent information, related with a great number of elements of the experience and other facts that are useful for making sense of its parts. The main limitation of individual perception is that it is subjective: social condition, mind models, particular interest, and role in the experience. It also depends on the emotional conditions and many other elements that can influence individual perception. However individual perceptions, always, contain objective facts from a first hand observer.
The Timeline

The timeline is a space where the Critical Moments are organized chronologically. The Critical Moments, grouped in a Timeline, are a brief description of the experience. The timeline is a resource for gathering all the Critical Moments and to visualize them as whole. It is a sequential representation of the experience in the way it was perceived by the people involved in it. The timeline is a way to group and to present the diverse Critical Moments of the participants in a highly visual way. The timeline brings together all the perspectives in a single representation. It puts together all the Critical Moments and make possible to observe similarities and differences of perception and criteria of each one and all the participants. As we will see it can be a very powerful cognitive tool for analyzing the experience.

Enabling the visualization of all Critical Moments at a glance, the timeline makes easier to discover patterns among them; to see phases of the experience when most events were positive, and phases not so good, to identify groups of issues that marked some parts of the experience, etc.

The Timeline summarizes the experience through the moments people consider of highest importance, the Critical Moments. And the Timeline expresses how the participants value those events by their position in the upper side, in the down side or on the timeline. The same Critical Moment can be perceived as positive by some of the participants and also be perceived as negative by some others. These differences of meanings and values may be highly instructive for understanding the experience. They show how some events have different impact to different people and force some participants to rethink their judgment and understanding of those events.

Analysis and Storytelling

The analysis may acquire many forms depending of the findings and issues that start to come up in the mind of the participants. Some analyses come up directly in the form of immediate findings and trigger questions around them. However there are three types of analyses that deserve particular attention:

- Identification of patterns in the timeline
- Groups of Critical Moments by Inquiry Questions
- Storytelling about some key Critical Moments
Identification of patterns in the timeline

The pattern exploration is a method for observing the timeline of critical moments as a whole for understanding the main characteristics of process of the experience, by discovering how the Critical Moments can be grouped and how they are related with each other. The Critical Moments, once gathered, make possible to identify the predominance of some kinds of Critical Moments in a period of time.

The sum of their effects can contribute to explain how the experience went through particular phases of qualitative change in the participants and in their actions. It is possible also to identify that there were groups of Critical Moments shared by a meaningful group people and others that there were particular to just one of the participants. The pattern exploration starts by identifying and naming phases of the experience. The phases are periods of time with groups of critical moments of the same kind or related to the same kind of issues or actions.

Once the phases are identified and named it is possible to identify the critical moments that “closed” a phase and opened the next one. It is possible also to identify which issues were characteristic of a specific phase or group of phases and which others were present throughout the experience. It is possible to identify which stakeholders were related with each group of critical moments, and which critical moments were related to internal components of the experience and which others were mostly related to external factors or conditions, opening doors for understanding the relation between the experience and its context.

Once the process of the experience and the relations among Critical Moments are made visible it is possible to explore their meanings and to deepen the understanding of the experience. If these analyses are done using brief storytelling (between 1 to 3 minutes) it is possible to enrich simultaneously the factual base and the depth of the reflection.
The patterns of the Timeline may generate many questions in the mind of the participants. And those questions may contribute to stimulate the analytical effort that will be developed during the next phase of the reflective process.

Groups of Critical Moments by Inquiry Questions

Another possible analytical path is to reorganize the Critical Moments around their relevance for answering each one of the Inquiry Questions. In this case the participants are invited to go to the time line, to take the critical moments from there and to group them near to one Inquiry Question based on their contribution for answering that question.

![Critical Moments Grouped around Inquiry Questions](image)

The participants as a whole should do this work, talking briefly among them, if necessary, at the same time they move the Critical Moments, CM, to a particular Inquiry Question, IQ. The way the participants relate each CM to each IQ may bring very meaningful insights about the experience.

The participants may be invited to explain to their colleagues why they grouped the CM that way. For explaining their reasons they start to tell brief stories about some CMs and share their thoughts with their colleagues. The explanations of each participant enrich the set of interpretations of the group and can trigger very productive conversations. It should be clear that the purpose of those conversations is not to convince other people of ones opinions; it is not to do polemic inside the group, but to communicate particular ways of perceiving and explaining the experience. It is very important if the participants can bear in their minds, at least for a moment, this diversity of interpretations.

This exercise is an initial activity; it should not have the purpose of developing in depth discussions but of enriching the perspectives. If some complex or highly polemic issue arrives it should be registered and put in the agenda for further discussion after.
The next step is to select one of the IQs and rank the CM by their importance for the answering of that IQ. It can be done by giving the participants 3 spots of color, each one, for voting with them in the CM most meaningful for that IQ, or just go to the board and express their votes in some way. Once they have voted, we can visualize how the group relates the CM to the IQ. For understanding that, we can ask each participant to explain to his colleagues why they voted that particular way. In their effort for explaining to others the reasoning behind their votes they tell brief stories of the CMs, and unveil the meanings they perceive of that CM in the whole process of the experience. Doing that we will help to emerge a round of analyses about the experience and briefs stories that inform those analyses.

That round of analyses may generate a set of very interesting findings and conclusions, and can set the stage for start to answer the question, or at least, to identify the elements that can contribute to possible answers. It is very important to observe the way the group is analyzing the CM and approaching the IQ. It is also important to document carefully this phase of the reflection, because of the richness of insights and ideas that may come up. In a session of reflection done with a group of high-level executives of an International Bank, last year, they concluded greatly surprised by the number of analyses they were able to do in one-hour exercise. (That one-hour exercise was done once the CM were identified and the timeline constructed)

Based on the findings and conclusions the facilitator can drive the dialogue to a higher level of abstraction by presenting new questions related to the IQ that is being discussed. For example, the facilitator can ask: What of these findings and conclusions bring elements of the value-added of our participation, and why?

The session should finish with one or more answers to the Inquiry question, a set of other lessons learned from the reflection: principles, criteria, strategies, etc. and ideas about the future. There may be elements of the answer that are shared by all participants and other elements that have diverse opinions. It can also generate a set of new inquiry questions to be addressed in the future, by new reflection sessions or by practice. The complete exercise should be done for each one of the selected IQs.

This kind of exercise may be very exiting and friendly to the participants, but not necessarily easy to facilitate. Different people have different opinions and also think at different levels of abstraction, or may migrate from lower levels to higher levels of abstraction at different paces, or they may just be observing the phenomena from different angles or in different dimensions, and many disagreements may arise because of that. The facilitator has the responsibility of creating bridges between different levels of abstraction, different languages and different dimensions. He needs to be capable of understanding everyone, including the most intelligent of the participants. He will need to verify if any statement, if it is a “finding”, it has support in the information brought to the table and; if it is a “conclusion”, it has consistency with the set of findings we already have generated. He should be able to manage the controversies in a productive way, solving those parts that can be treated in a brief conversation, and scheduling those other aspects that are beyond that for future conversations.
People tend to over-generalize, so the facilitator must be careful about the context of validity of the lessons learned, for preventing to finish with a set of generic knowledge (lessons learned) that has no practical usefulness, or that may induce other people to commit mistakes.

**Storytelling about some key Critical Moments**

Another option of developing the analytical phase of the reflection is by telling the story of one CM or of a small group of CM. Ceasar McDowell, in his work about race and democracy, developed and used this option of analysis.

After grouping the CM around specific IQ, he helps the participants to select one or a small group of CM and organize a group of participants who will be responsible of telling stories about a particular CM or a group of critical moments interrelated. It is an option where one or a small group of CM is analyzed in more depth than the other ones. In this case the story may be longer than in the other two options. There are two key dynamics in that case, the storytellers and the listeners.

- The storytellers are the group of people who are exploring in their memories bringing facts, perceptions and emotions to the table. This group is most of all informing the listeners of what they witnessed in the experience, making visible key perspectives, aspects, and elements for understanding what happened and why it happened.

- The listeners are people who also has their own understanding of the experience, but that are trying, mostly, to understand the perspectives of the storytellers. The listeners should be able to put aside their own opinions for using all their intelligence in following up others ideas, feelings and logics. The listeners can do questions to the storytellers, but being careful of not disturbing them too much. The questions they can do are for helping the storytellers to elicit new facets or facts about the experience, not for polarizing opinions.

The storytelling sessions have the purpose of bringing light to the experience, enriching the informational base of the opinions, generating findings based on evidence (witnesses) and collect issues to be more discussed after. These sessions have clearly two moments: storytelling and analysis. During the storytelling moment, as the listeners are receiving information about the experience, they have many thoughts. However, they should not express their ideas as conclusions to the storytellers, but as questions about the facts that could help them to better understand the storytellers’ perceptions.

The moment of analysis opens a dialogue about the information the storytellers brought and the participants try to make sense of all this new set of aspects of the experience that is getting known by the stories. Because of the level of structure of this moment is very low, the facilitator has a role absolutely decisive. He has to be capable of maintaining the dialogue flowing, of guiding the analyses in a way that the participants take advantage of the new elements of the experience. The same issues about level of abstraction, building bridges, translating perspectives, etc. referred in the former section are equally, or more, valid for this kind of analytical process.

**Two Hours Reflection Exercises**

There are people who have very tight schedules and may be hard to find a time to organize them in meetings of more than one hour. In that case the reflection process could be broken into two
sessions. It is not ideal, the interruption of the process may make to lose insights and creativity, but it may be the only option for some groups. For this exercise the participants should be 10 or less.

For doing that there are some possible strategies that can be combined for achieving the double objective of learning from the experience and training people in being reflective practitioners. They will require a trained facilitator and a documenter. Here are two possible options for organizing the reflection in two sessions of one hour each one, or in a longer session of two hours.  

These kinds of reflections should be managed by the facilitator with high level of methodological flexibility for making possible to generate the most in discoveries, reinterpretations and ideas in a very short period of time. The timing will be rigid, but the method should be flexible.  

Session one, one hour:

1. The future participants in the reflection receive a two pages document explaining the methodology and its main concepts: Reflection on Action, Inquiry Questions, Critical Moments, Timeline, Findings, Conclusions, etc. They should be instructed to read these two pages before the meeting. The participants are also asked to prepare their Inquiry Questions and to write them down in index cards before to come to the meeting.

First half hour:

2. When they come, the facilitator will do a presentation of the method for 5 minutes. Having their index cards of IQ already prepared, we can start by putting the cards with IQ in the wall, grouping them by similitude, analyzing the diverse proposal and selecting, by vote, the group of the (1, 2 or 3) most relevant for the experience we are working on. This second moment may last 10 minutes. The total time of the step should be 15 minutes.

3. Having the definition of critical moments and the Inquiry Questions visible for the participants. The facilitator explains the concept of critical moments and they are invited to write 6 to 10 CM, each of them in individual index cards. This can last 10 to 15 minutes.

Second half hour:

4. The facilitator explains the concept of timeline and the participants come in front of their colleagues, present their CM to them and put the CM in their place in Timeline. Each participant could last between 1 to 2 minutes presenting and fixing all his CMs. If the number of participants were 10, this step should last 15 to 20 minutes.

2 There can be more possibilities of organizing processes of reflection, if the facilitator is capable of understanding the cognitive process people is going through in their reflection and of creating, on the run, cognitive tools for enabling people to express and organize their ideas.

3 For being flexible in the method the facilitator should clear that there are moments of descriptions, of uncovering facts, discovering findings and are moments of analysis and synthesis, when people are rethinking their ideas, inducing and deducing. The facilitator should be also aware that all analyses and all conclusions are incomplete and worth of being improved.
5. Finally we could have a first exercise of commentaries about what the participants “see” in
the timeline. They should write a couple of commentaries in index cards and present one of
them in front of the group. This could last between 10 to 15 minutes.

Session two, one hour:
(It is strongly recommended not to break this session into two halves)

1. Before to start this session the facilitator should decide which analytical path he will use:
Identification of patterns in the timeline or Grouping Critical Moments by Inquiry Questions.
Once he decides the path he should organize the analysis in four main steps.

2. This second session starts with a brief presentation of its purposes and some key concepts
like: findings and conclusions; and with a presentation of the Timeline constructed last
session and the review of commentaries. This step should last 5 minutes. (If we can avoid this
step we can use this time for the next steps)

3. Assuming the facilitator selected the second path, Grouping CM by IQ, the first exercise will
be grouping the CM around IQ and explaining briefly their reasons for grouping that way.
This step should last 10 minutes.

4. The second exercise should be the selection of the most important IQ, that one that will be
object of analysis, and the vote around the most important CMs, for answering the selected
IQ. These votes should be explained by some of the participants. This step should last 10
minutes.

5. The third exercise should explore the elements that contribute to the answer of the IQ, from
the two former conversations (exercises) and the reflections of the participants. The facilitator
and the documenter should be very agile for capturing all the ideas and interpretations that
are emerging and putting them visible for the group. This step should last 10 minutes.

6. The fourth exercise should be double the analysis of all the elements emerged until that
moment for synthesizing them toward some conclusions about the IQ and the projection to
the future. The Facilitator and documenter, again, should be very agile for capturing and
organizing the all the ideas and interpretations that are emerging and putting them visible for
the group. This step should last between 15 to 20 minutes.

7. The final moment will be the capture of general reflections about how the participants felt as
reflecting on their experience. This step should last between 5 to 10 minutes.

If the facilitator decide to go through the first option (identification of patterns in the timeline) he
should organize the second sessions into: findings from the timeline, conclusions about one IQ and
looking forward.

The challenges for the facilitator and for the documenter are high in this kind of exercise, they have
to be able to maintain the schedule of the exercise, help the participants to elicit and express their
experience and thoughts, and work with them on the emerging findings and conclusions and, at same
time, maintaining himself at a higher level of abstraction for perceiving and supporting the cognitive
processes the group is going through.
Comments about facilitation

Facilitators play a very important role in any reflective process. So a methodology should include some elements about how to interact with the participants and how to manage their capacities and their cognitive skills.

Caution to Facilitators

Many people think that for applying a methodology the most important is to understand its steps and procedures. The assumption is that if I know the procedure and I apply them carefully, then I will get the desired results (if, if, then). However, this is not the case for the methodologies for reflective activities, like the Critical Moments Reflection Methodology.

Who embraces a reflective method and wants to apply it with other people will need to go beyond the application of the procedures and make an effort to understand its rationale and its main concepts. The challenge of a professional who will facilitate a reflective methodology will not be technical. It will be much more akin to artistry than to a technique. The domain of the technical tools may be very important for the facilitator’s work but it can’t be reduced to the application of those tools. The facilitator’s work is, first of all, a partnership in a reflective journey, and a decision of sharing an effort with people. The facilitator uses his cognitive resources to help people to go through their process of reflection and exploration. The facilitator and the participants share the definition of the route of the process, and challenge of adaptation should be mainly borne by the facilitator.

In this partnership the facilitator has particular roles:

- Generating an enabling the environment, and
- Enhancing the cognitive resources people have to work with.

These two main roles require a permanent creative posture from the facilitator. In this effort he will need to make use of all his capacities and experience, and not only of the technical tools of a methodology.

The person who wants to facilitate reflective processes should be aware that the development of facilitation abilities lasts many years, and can not be acquired theoretically but only through experience. This article assumes that the facilitators who want to apply this methodology already have developed his main facilitation abilities.

Process and Methodology

The facilitator is not responsible only for applying a methodology he is also responsible for the success of the workshop, for the evolution of the group (emotions and thoughts) during the workshop. Frequently, people who want to learn a methodology are very eager of knowing their detailed instructions. They assume that applying a methodology, step by step, following carefully its instructions, the results will come up naturally. For most technical activities, that manipulate only inert materials like cements, sand, and bricks for constructing a house, the following of the instructions guaranty the results. But with people things are not that simple. Each moment of a workshop is a moment in the life of the group. The methodology is only a resource for organizing
the work of the facilitator. To perceive the process of the group and manage it is the real challenge of the facilitator.

In general, the use of the methodology following its original sequence step by step is the best way to reach the expected result. However there are various sources of disturbances in the relation between the methodology and the process of the group:

1. The group may have cognitive preferences. Some people feel more comfortable with deductive methods; others prefer to construct gradually the solution. Some groups enjoy creative or less structured activities, but other prefer to work in a very organized way and feel stressed under situations without structures. The facilitator is responsible of identify the group preferences and to guarantee the group productivity managing different classes of cognitive processes and methods.

2. The group may have some specific concerns or interest in some questions. People may be interested in to go deeper into some events or some issues. People may be eager of having a problem solved, or they may feel not prepared to tackle a problem in a specific moment. The facilitator needs to assess those elements and give a positive response to them just in time.

3. The issue the group is facing may be more complex or more difficult than expected, by the facilitator and or by the group, requiring of doing some analyses that were not previewed for the workshop. The facilitator will need be able to maintain the schedule and incorporate that new issue.

The conclusion is that each reflection process has its own particularities. The facilitator should be careful for recognizing them when they emerge and adapt to the process of the group.