Session 6: Reflection Tools – Timeline and Learning History (11:15–12:45)

Objective

Introduce participants to two complementary tools for participatory monitoring and reflection: the **Energy Timeline** (participatory timeline method) and the **Learning History**. By practicing a mini-timeline exercise and examining how a learning history is constructed, advisors will learn how to capture the story of an innovation process, analyze it with stakeholders, and extract lessons to improve future actions. The outcome is that participants can facilitate a timeline session in their networks to evaluate progress and can produce a simple learning history document to make sense of what their group has experienced.

Presentation - Introduction (5 min)

Pose a question: "*How do we know if our innovation process is on the right track? And how do we help the group learn from its journey?*" Traditional project monitoring might use metrics (number of trees planted, etc.), but here we focus on **process monitoring** – the qualitative story of the network. The Timeline and Learning History are *participatory M&E* tools that involve the stakeholders in evaluating and learning from their own experience.

Explain that after some time (mid-way or end of a project), it is useful to pause and reflect with the network: What have been our high points? Low points? Surprises? What can we learn? These tools structure that reflection.

Presentation - The Timeline Method (20 min)

Describe the **Timeline** (sometimes called Energy Timeline) as a facilitated workshop where participants collectively create a timeline of their project or network's history. It's straightforward and engaging: you draw a long chronological line on paper (taping flipcharts together on a wall or table), and mark positive moments, negative moments, and breakthrough "Eureka" moments along it. Typically it looks like:

- Top row = **Positive moments** (times that gave energy, successes), often marked with a smiley or green colour.
- Middle row = **Negative moments** (challenges, conflicts, disappointments) marked with a frowny or red.
- Bottom row = **Flash or insight moments** (turning points, big realizations) with a lightbulb symbol.

Participants write events on sticky notes and place them in the appropriate row and time sequence. For example: "Mar 2024 – field day with 50 farmers (positive)"; "Jul 2024 – drought killed seedlings (negative)"; "Sep 2024 – discovered local nursery as partner (flash)."

Emphasize *participation*: everyone's perception is valid even if people see the same event differently (that itself is insightful). No need to agree on one version – just get them all up there. I is a non-judgmental way to gather feedback: facts and feelings can coexist on the timeline.

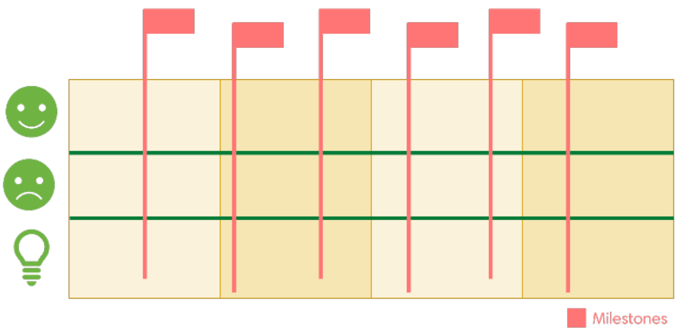

FIGURE 6. example of a Timeline setup (modified from CECRA)

After building the timeline, the group **discusses patterns**: Where were clusters of positives? How did they handle the negatives? Did a big negative lead to a later positive (for example: conflict leading to better understanding)?

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Often, seeing it laid out, people realize "Wow, we had a rough patch but then recovered," which boosts morale, or "We haven't had any breakthroughs in a while, maybe we need to shake things up."

Mention practical tips: you may need 1–2 hours with a group to do a full timeline if the period is long. It is good for mid-term evaluation or end-of-project reflection. It helps newcomers see the history and veterans to share perspectives.

Activity – Mini Timeline (15 min)

Let's do a miniature version now, using our training experience as content (or if participants prefer, one of their own projects). Since Day 2 morning, they have about approximately 1 day of "network" together – we can timeline that as an example. Draw three rows on a flipchart titled with a smiley, frown, and bulb. Ask: "*What were some high points for you since we started yesterday? Any low points or confusing moments? Any aha moments of insight?"* Have them call out or jot on stickies. Mark a rough time axis (yesterday morning to now). You'll likely get things like *"Great discussion on stakeholder mapping"* (positive), "*Felt tired after lunch*" (negative), "'*Bake a new pie'* metaphor really clicked" (insight). This exercise is a bit meta and fun. To summarise- if we were the network, this would tell us how our process (the training) is going. We might learn, say, the afternoon needs more energizers, or that particular topics were very valuable.

Now pivot: imagine doing this with your farmer network after one year of work – how insightful that would be. It brings out emotions and lessons that reports miss. It is a group **sense-making** process.

Presentation - Learning History (20 min)

The timeline captures what happened and how people experienced it. The **Learning History** goes a step further: it is a documented analysis of that story, typically written in a way that separates the narrative of events from the analysis and lessons. Often, it is formatted with two columns: right column tells the story (with quotes, like "In June, farmers and researchers met... one farmer said 'X'"), and the left column has the analyst's commentary or interpretation ("This meeting was a turning point because trust was built…").

Explain that the Learning History aims to answer: *Why did things happen the way they did? What can we learn?* It is usually written after conducting the timeline or interviews, and then shared back with the group for validation and future planning. The value is it **makes implicit knowledge explicit** – lessons aren't just in people's heads or fleeting talk, but documented for the network and others.

Give a concrete example: Suppose an agroforestry Operational Group in France had a timeline done. A learning history might be a 5-page document with sections like

"Scene 1: The Beginning – 'Seven Farmers Join Forces' (the goal setting phase, with quote from a farmer about hopes), analysis noting initial excitement);

Scene 2: First Conflict – 'Misunderstandings towards Insights' (narrative of a conflict meeting, with quotes, analysis explaining how conflict led to clearer roles;

Scene 3: Breakthrough – 'Surprise Encounters!' (narrative of the group discovering a new partner or technique, analysis of why that was pivotal)." This example aligns with the suggestion in the reference to use newspaper-style scene headlines.

The left-column analysis might apply models like we learned: for example, "*This conflict corresponded to a Challenge pattern turning defensive (Fight), requiring a cold intervention to reset norms*" – making our theoretical tools part of understanding practice.

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Emphasise: one need not always write a formal dual-column report; the key is to consciously reflect and derive lessons, not just list events. However, the dual column format (story vs analysis) is a neat method from Kleiner & Roth (1997), who pioneered learning histories in corporate settings.

Presentation - Link to Hero's Journey (5 min)

To make it relatable, mention that a Learning History often reads like a story – even a hero's journey. The *hero* is the network (or could be a protagonist group). They start with ambition, face challenges (dragons), receive help (maybe an unexpected grant or expert), perhaps fail and learn, and eventually achieve something different (maybe not what they originally thought, but valuable). This narrative perspective encourages people to see meaning in struggles – "the dragon (conflict) taught us X." It is motivating: even if the innovation did not go exactly as planned, the journey had growth and outcomes. Sharing a learning history can be inspiring to others who might undertake similar journeys.

Group Discussion (10 min)

Ask participants how they might use these tools. For instance, if an advisor is halfway through a project and feels things are messy, doing a timeline session could clarify issues. Or at the end of a project, writing a learning history helps justify and explain results to funders (and to themselves). One can also combine them: timeline done by participants, then an advisor or evaluator writes the learning history from that timeline.

Encourage them that facilitating a timeline is well within their ability – it is mostly about asking the right questions and providing materials. As a reference, mention that the detailed guidelines (like those we paraphrased from our document) exist, and they will get a handout or reference in the training materials.

Conclude Session 6 by asserting: *An innovation process without reflection is a lost opportunity.* Reflection tools turn experience into knowledge, which is the essence of innovation – learning what works in complex reality and why. This prepares us for the final parts of our workshop, where participants will apply everything – including reflection – to their own cases.

Success Tip: The timeline session requires gathering everyone, which itself can renew network bonds (like "*wow, we went through a lot together*"). The learning history might require one person (often the advisor or an external facilitator) to spend time writing and analysing – but it does not have to be perfect prose, even a summary report with bullet points of lessons is good.

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