NEXUS PIONEER CONSULTING GROUP, LLC

After-Action Review Note-Taking Template

Free Resource Template

A structured worksheet for capturing observations, strengths, performance gaps, leadership decisions, coordination issues, evidence, and practical recommendations during exercises, incidents, and preparedness reviews.

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Prepared By	Nexus Pioneer Consulting Group, LLC
Intended Use	Downloadable resource for facilitated after-action reviews, hotwashes, incident debriefs, exercise evaluation, and improvement planning support

Where Experience and Innovation Converge in Crisis Preparedness

Template Use and After-Action Review Instructions

Purpose: This template supports disciplined, evidence-aware note-taking during after-action reviews so observations can be converted into defensible findings and practical improvement actions.

Use: Apply it during exercise hotwashes, formal after-action meetings, real-world incident debriefs, continuity reviews, capability assessments, operational reviews, and leadership learning sessions.

Note-taking approach: Record what happened, the conditions that shaped performance, the operational effect, the evidence or source, and the follow-up question. Separate direct observation from participant opinion and later interpretation.

Sensitive information note: Use the minimum detail necessary. Reference controlled logs, recordings, systems, or evidence locations rather than reproducing restricted operational, personal, cybersecurity, legal, medical, or security-sensitive information.

Public resource note: This free template is planning support and should be adapted to organization-specific authorities, evaluation methods, records-management requirements, and reporting standards.

After-Action Review Information

Organization		**AAR Lead / Office**	
Event / Exercise		**Review Date / Time**	
Operational Period		**Review Location / Platform**	
Prepared By		**Facilitator / Lead Evaluator**	
Participants / Groups		**Report Owner / Due Date**	
Evidence Location		**Distribution / Access Limits**	

1. Observation Categories and Note-Taking Standard

Use consistent categories so observations can be compared, validated, synthesized, and moved into an after-action report or improvement plan without losing context.

Category	Capture When	Minimum Note
Strength	A practice, decision, resource, relationship, or adaptation supported effective performance.	What worked, why it worked, operational value, and how to sustain or replicate it.
Gap	Performance fell below an expectation, capability need, plan requirement, or operational objective.	Observed condition, expected condition, consequence, contributing factor, and supporting evidence.
Decision	A leader or authorized role selected a course of action, accepted risk, changed priorities, or resolved uncertainty.	Decision, authority, timing, information available, alternatives, and operational effect.
Coordination Issue	Handoffs, roles, requests, partner interfaces, information sharing, or task alignment affected performance.	Parties involved, coordination point, friction or success, impact, and needed improvement.
Recommended Improvement	A specific change could increase readiness, reliability, speed, clarity, safety, or resilience.	Desired result, action concept, accountable owner, urgency, dependencies, and evidence of completion.

Evidence and Confidence Convention

Evidence Basis	Meaning	Typical Confidence
Direct	Observed firsthand or confirmed through an authoritative record.	High
Corroborated	Supported by two or more independent sources or records.	Moderate to High
Reported	Stated by a participant or stakeholder but not yet independently confirmed.	Moderate
Preliminary	Incomplete, conflicting, or still under review.	Low to Moderate

Writing standard: neutral, specific, traceable, operationally relevant, and free of unsupported blame or conclusions.

2. AAR Roles, Ground Rules, and Discussion Flow

Establish roles before the review begins. One person may fill more than one role, but facilitation and detailed note-taking should be separated when the discussion is complex or time-sensitive.

Role	Primary Responsibility	Key Output
Facilitator	Keeps the discussion objective-focused, inclusive, constructive, and on time.	Confirmed themes, clarified facts, and explicit follow-up questions.
Lead Note-Taker	Captures observations, decisions, evidence references, unresolved issues, and assignments.	Complete master notes with traceable observation IDs.
Evaluator / Observer	Provides direct observations and links performance to objectives, plans, capabilities, or standards.	Evidence-supported strengths and gaps.
Operational Lead	Clarifies context, constraints, authorities, risk, and decision logic.	Validated operational narrative and decision context.
Report / Improvement Lead	Synthesizes notes, confirms findings, and transitions recommendations into action planning.	AAR findings, recommendations, and improvement actions.

Suggested Ground Rules

- Focus on systems, decisions, conditions, and outcomes rather than individual blame.
- Distinguish facts, perceptions, assumptions, and unresolved questions.
- Capture strengths with the same discipline used to document gaps.
- Do not force agreement; document material differences and identify what requires validation.
- End each major theme with the operational implication and a clear next step.

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2. AAR Discussion Flow and Meeting Preparation

Use the discussion sequence to move from shared facts to strengths, gaps, decisions, and concrete commitments without allowing one issue to consume the entire review.

Suggested 60-Minute Review Flow

Time	Focus	Discussion Output	Facilitator Note
0-10 min	Purpose and timeline	Shared understanding of objectives, major events, and review boundaries.	Confirm what is in and out of scope.
10-25 min	What worked	Validated strengths, enabling conditions, and practices to sustain.	Ask why the strength was repeatable.
25-45 min	What created risk or friction	Gaps, coordination issues, decision constraints, and consequences.	Separate symptoms from contributing factors.
45-55 min	Improvements	Prioritized recommendations, owners, dependencies, and immediate controls.	Frame improvements as results, not activities.
55-60 min	Commitments	Open questions, assignments, evidence needs, and report timeline.	Read back commitments before adjournment.

Meeting Preparation Check

Preparation Item	Owner / Status	Notes
Objectives, scope, and operational period confirmed.		
Timeline, plans, logs, products, and evaluator notes available.		
Participants and missing perspectives identified.		
Sensitive-information and distribution rules confirmed.		

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3. Event / Exercise Overview and Objectives

Record the operating context before assessing performance. The same action can be appropriate or inappropriate depending on mission, hazard, authorities, time pressure, staffing, information quality, and resource conditions.

Event Type		**Scenario / Incident**	
Start / End		**Location / Area**	
Participating Organizations		**Command / Coordination Structure**	
Key Plans / Procedures Used		**Major Constraints**	
Primary Risks / Lifelines		**External Partners**	

Objectives and Expected Performance

Objective ID	Objective / Capability	Expected Performance	Evaluation Source	Primary Owner
OBJ-01				
OBJ-02				
OBJ-03				
OBJ-04				

4. Key Event and Timeline Log

Capture the sequence of consequential events, decisions, requests, handoffs, and changes in operating conditions. Use approximate times when exact timestamps are unavailable and mark them as estimates.

Seq.	Time	Event / Trigger	Action / Decision	Operational Effect	Evidence / Follow-Up
01					
02					
03					
04					
05					
06					
07					
08					
09					

Timeline review prompt: Where did conditions change faster than plans, information, authority, staffing, or coordination could adapt?

5. Master Observation Log - Page 1

Use one observation ID across all supporting worksheets. Keep entries concise and place detailed analysis on the applicable strength, gap, decision, or coordination detail sheet.

Observation ID	Objective / Time	Type	Observation	Evidence / Source	Operational Significance	Follow-Up
AAR-001						
AAR-002						
AAR-003						
AAR-004						
AAR-005						
AAR-006						
AAR-007						

Review prompt: Which observations are sufficiently supported to become findings, and which remain questions or unvalidated reports?

5. Master Observation Log - Page 2

Continue the observation sequence. Cross-reference decision, timeline, evidence, and improvement records rather than duplicating lengthy detail.

Observation ID	Objective / Time	Type	Observation	Evidence / Source	Operational Significance	Follow-Up
AAR-009						
AAR-010						
AAR-011						
AAR-012						
AAR-013						
AAR-014						
AAR-015						

Review prompt: Are similar observations symptoms of one underlying issue, or do they require separate findings and actions?

6. Strength and Effective Practice Detail Sheet

Observation ID		**Objective / Capability**	
Strength Title		**Time / Phase**	
Primary Office / Team		**Evidence Basis / Confidence**	

Observed Strength

Describe the action, practice, decision, behavior, resource, or coordination mechanism that supported effective performance.

Why It Worked / Enabling Conditions

Identify the conditions that made the strength possible, such as training, relationships, authorities, technology, planning, leadership, redundancy, or initiative.

Operational Value and Evidence

Describe the measurable or observable effect and reference logs, products, records, participant corroboration, or evaluator notes.

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Sustain, Replicate, or Scale

Recommended Sustainment Step	Owner	When / Trigger	Evidence of Sustainment

Strength review prompt: Is this success institutionalized, or did it depend on a single person, workaround, or temporary condition?

7. Gap / Issue Detail Sheet

Observation ID		**Objective / Capability**	
Gap / Issue Title		**Time / Phase**	
Primary Office / Team		**Evidence Basis / Confidence**	

Observed Condition

Describe what occurred without assigning unsupported cause or blame.

Expected Condition / Performance Standard

Describe the plan, objective, capability need, policy, authority, or operational expectation used for comparison.

Operational Consequence / Risk

Identify the effect on life safety, mission, continuity, coordination, timeliness, information quality, resource use, compliance, or public trust.

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Contributing Factors and Root-Cause Questions

Factor Area	What Contributed?	Evidence / Question	Potential Control
People / Training			
Plans / Procedures			
Information / Technology			
Authority / Coordination			
Resources / Logistics			

8. Decision and Leadership Action Log

Capture significant decisions, changes in priorities, risk acceptance, escalation, delegation, and unresolved decision needs. Record the information available at the time rather than judging decisions solely with hindsight.

Decision ID	Time / Trigger	Decision / Direction	Authority / Owner	Information Available	Operational Effect	Follow-Up / Validation
DEC-01						
DEC-02						
DEC-03						
DEC-04						
DEC-05						
DEC-06						
DEC-07						

Decision Quality Review

Decision strengths	What enabled timely, clear, and appropriately authorized decisions?
Decision constraints	Where were authority, options, information, time, or risk thresholds unclear?
Escalation needs	Which decisions require executive, legal, policy, partner, procurement, or external action?

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9. Coordination, Communication, and Information Flow Review

Use this page to document handoffs, role alignment, partner interfaces, situation reporting, information requests, public messaging, and shared operating picture issues.

Issue ID	Parties / Functions	Coordination Point	What Worked / Failed	Operational Effect	Information or Decision Needed	Recommended Improvement
COORD-01						
COORD-02						
COORD-03						
COORD-04						
COORD-05						
COORD-06						

Information Flow and Handoff Check

Review Area	Yes / No / N/A	Evidence / Notes
Roles and points of contact were understood.		
Requests were acknowledged, tracked, and closed.		
Situation information was timely, accurate, and usable.		

Review Area	Yes / No / N/A	Evidence / Notes
Handoffs preserved context, priorities, and unresolved issues.		
Public, internal, and partner messages were aligned.		

10. Objective and Capability Performance Review

Rate performance only after reviewing the available evidence and operational context. Use the narrative field to explain why the rating is appropriate and what the rating does not capture.

Rating	Use When
onstrated	Expected performance was consistently achieved under the conditions tested.
Demonstrated	Some elements were effective, but material limitations, inconsistencies, or workarounds affected performance.
onstrated	Expected performance was not achieved or the capability was unavailable when needed.
d	The objective or capability was not meaningfully exercised or observed.

ID	Performance Rating	Key Strength	Key Gap / Risk	Evidence / Confidence	Improvement Direction

Rating		Use When		

Synthesis prompt: Which performance limitations are isolated, and which indicate a cross-cutting system or governance issue?

11. Recommended Improvements and Priority Screening

Frame each recommendation as a desired operational result. Priority should reflect consequence and urgency while remaining realistic about feasibility, dependencies, and leadership authority.

Priority Factor	1 - Lower	2 - Moderate	3 - Higher
nce	Limited operational consequence.	Meaningful degradation or exposure.	Severe or time-sensitive life-safety, legal, continuit consequence.
	Can wait for a normal planning cycle.	Should begin within the next operating or budget cycle.	Requires immediate control, decision, or accelera
ct	Incremental improvement.	Material improvement to one function or capability.	Cross-cutting improvement or restoration of a criti
	Major unresolved constraints.	Achievable with defined support or dependencies.	Actionable with available authority, resources, and

Recommended Improvement	Risk	Urgency	Impact	Feasibility	Priority / Owner	Evidence of C

Priority Factor	1 - Lower		2 - Moderate		3 - Higher	

12. Improvement Action Development Worksheet

Complete one worksheet for recommendations that are ready to move into a corrective action register, improvement plan, project charter, policy update, training plan, or leadership decision package.

Improvement ID		**Linked Observation(s)**	
Action Title		**Priority**	
Accountable Owner / Office		**Executive Sponsor / Approver**	
Target Date		**Next Review Date**	

Corrective Action Statement

State the required result, not only an activity, meeting, review, or purchase.

Success Criteria / Intended Operational Result

Describe how the organization will know the improvement worked.

Milestones, Dependencies, and Evidence

Milestone / Deliverable	Owner	Due Date	Dependency / Decision	Completion Evidence

Milestone / Deliverable	Owner	Due Date	Dependency / Decision	Completion Evidence

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13. Leadership Summary and Key Themes

Use this page to brief leaders on the few issues that most affect mission performance, risk, coordination, resource decisions, and near-term improvement. Avoid repeating the full observation log.

Executive Snapshot

Objectives Fully Demonstrated		**Critical / High-Risk Gaps**	
Strengths to Sustain		**Immediate Controls Needed**	
Decisions Required		**Priority Improvements**	
Open Evidence Questions		**Report / Action Due Date**	

Top Strengths

Strength	Operational Value	Sustainment Decision

Top Gaps, Risks, and Leadership Decisions

Gap / Risk	Consequence	Decision / Support Needed	Owner / Due

Leadership Narrative

Summarize what leaders should understand, decide, communicate, or resource next.

14. Participant and Stakeholder Feedback Themes

Synthesize feedback by theme rather than attributing every comment. Preserve meaningful differences in perspective and distinguish broad consensus from isolated or role-specific concerns.

Theme ID	Theme / Feedback	Source Group(s)	Frequency / Confidence	Operational Meaning	Follow-Up
THEME-01					
THEME-02					
THEME-03					
THEME-04					
THEME-05					
THEME-06					
THEME-07					

Perspective and Outlier Review

Areas of broad agreement	Which themes were repeated across roles, organizations, shifts, or evidence sources?
Material differences	Where did leaders, operators, partners, evaluators, or support functions view performance differently?
Voices requiring follow-up	Which impacted groups, external partners, public-facing staff, or technical specialists were not represented?

Potential bias or limitation	How might role, timing, incomplete evidence, or hindsight affect the feedback?

15. AAR Synthesis and Report Handoff Checklist

Use this checklist before drafting or approving the formal after-action report, improvement plan, leadership brief, or corrective action register.

Quality Check	Yes / No / N/A	Reviewer Notes / Evidence Reference
The event timeline and review scope are clear and internally consistent.		
Strengths and gaps are linked to objectives, capabilities, plans, or operational expectations.		
Material observations identify evidence basis and confidence.		
Participant perceptions are distinguished from confirmed facts.		
Decision context reflects the information and constraints available at the time.		
Coordination and information-flow issues identify the affected interfaces and consequences.		
Recommendations describe desired results and do not exceed the evidence.		
Priority improvements have owners, timing, dependencies, and completion evidence.		
Sensitive details are controlled; open questions, dissenting views, and evidence limitations are documented.		

Report Handoff and Approval

Draft Owner		**Draft Due Date**	
Technical Review		**Leadership Review**	
Final Approver		**Planned Publication / Distribution**	
Improvement Owner		**Action Register Owner**	

16. AAR Review Meeting Log and Roles

Meeting Date	Review Scope	Chair / Facilitator	Key Decisions and Assignments	Next Review Date

AAR Roles and Accountability

Role	Responsibility	Name / Office
AAR Owner	Maintains the official record, coordinates validation, and controls versions and distribution.	
Lead Facilitator	Guides discussion, confirms themes, and ensures unresolved issues are assigned.	
Lead Note-Taker	Maintains observation IDs, evidence references, decisions, and action handoffs.	
Report Lead	Synthesizes findings, drafts the report, and coordinates technical and leadership review.	

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Role	Responsibility	Name / Office
Approving Authority	Approves release, priority actions, risk acceptance, and closure or follow-on direction.	

17. Reviewer / Facilitator Certification and Review Record

Reviewer Name		**Title / Organization**	
Date Reviewed		**Event / Report Version**	
Review Status		**Distribution / Access Limits**	

Materials Reviewed / Evidence Sources

List the plans, logs, recordings, evaluation notes, participant inputs, operational products, and controlled evidence locations reviewed.

Additional Notes / Approval Conditions

Document limitations, unresolved questions, dissenting views, required revisions, release conditions, or follow-on review needs.

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Facilitation Prompts and Guidance Alignment

High-Value Facilitation Prompts

Review Area	Questions That Improve the Discussion
Timeline and Conditions	What changed? When did the team recognize the change? What information was available, missing, delayed, or disputed?
Strengths	What specifically worked? Why did it work? Would it work again with different people, timing, scale, or conditions?
Gaps and Risk	What expected outcome was not achieved? What consequence resulted or could have resulted? What factor had the greatest influence?
Decisions	Who had authority? Were thresholds and escalation paths clear? What trade-offs were considered? What would improve decision quality next time?
Coordination	Where did ownership, handoffs, requests, reporting, partner roles, or public messaging create clarity or friction?
Improvements	What result is needed? Who owns it? What dependency could block it? What evidence would demonstrate the improvement is working?

Guidance Alignment References

This template is designed as a practical after-action note-taking aid and is informed by widely used emergency management, incident management, continuity, exercise, improvement planning, and preparedness practices. Users should adapt it to their organization, jurisdiction, sector, authorities, and evaluation requirements.

- FEMA Homeland Security Exercise and Evaluation Program guidance
- FEMA National Incident Management System and incident-management doctrine
- FEMA Comprehensive Preparedness Guide 101 and continuity guidance
- Applicable accreditation, audit, risk, cybersecurity, public-safety, healthcare, infrastructure, and sector-specific requirements
- Organization-specific after-action, lessons-learned, evidence handling, legal review, improvement planning, and records-management procedures

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File Management and Website Resource Description

Recommended File Management

- Maintain one controlled master note set with a clearly identified owner, event name, date, and version.
- Use consistent observation, decision, coordination, and improvement IDs across notes, evidence, reports, and action registers.
- Restrict access according to the sensitivity of operational details, personnel information, legal issues, cybersecurity information, and supporting evidence.
- Record where evidence was reviewed and retained; avoid unnecessary duplication of sensitive material.
- Archive superseded drafts according to approved records-retention and document-control procedures.

Website Resource Page Description

After-Action Review Note-Taking Template: A free, downloadable worksheet that helps organizations capture observations, strengths, gaps, decisions, coordination issues, evidence, and recommended improvements during exercises, incidents, and preparedness reviews. Designed for emergency managers, evaluators, continuity teams, public safety and critical infrastructure leaders, facilitators, consultants, and internal improvement teams.

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