

Lessons Learned -- Not Just for Your Final Evaluation Reports

As many of you already know -- at least you tobacco-control veterans -- one of the most important parts of your final evaluation report is the "lessons learned" section. And, although progress reports do not specifically require it, documenting what your project learned from the intervention and evaluation activities in each reporting period is highly recommended. In fact, doing so along the way while the details are fresh in mind is the best means of making the most of all of your project's hard work and allows you to build on that experience for the road ahead.



The rationale for including a "lessons learned" section is fairly straight-forward: to let project personnel reflect on what was learned in the process in an effort to make things easier or more doable in the future. Additionally, this valuable information can be transferred and conveyed to other projects that may be working on a similar objective to assist them in their efforts. This is particularly the case with the hiccups that are inherent in so many of the objectives pursued by projects. Knowing what obstacles may come up and strategies to handle them (or to avoid) can save your colleagues from wasted effort.

In previous newsletter pieces we have recommended documenting organizational history in terms of the processes by which a local project takes on an objective from beginning to end. This is vital for a host of reasons. For one, the lifecycle for plans is fairly uniform. While the actors, or contacts, may change with each objective, the processes used to achieve the goal is often fairly similar -- conduct outreach, establish relationships with key players, gather informative or persuasive data, present the data, try to get decisionmakers to act. By documenting the process of how your project went about this -- who you worked with, what specific tactics were tried, the sequence and timing of actions, what other factors played a role -- the information can serve as a rough game plan that can be followed in future plans.

Another reason to document lessons and the process of pursuing objectives is staff turnover. In analyzing the last two cycles of final evaluation reports, we have found that staff turnover has been a major challenge to many projects. It is natural for people to move on and find new positions and new careers. When they do, they can often leave a major void in the organization and the forward motion of the campaign if there is no documentation of the process along the way. It is important for your project to know what efforts have already been made, what tactics have been tried, and which contacts and relationships are in place so that you don't have to start over from scratch when someone leaves.



Documenting the lessons learned during a "crisis" situation can also be vital. Although it is especially difficult to record the process during a time when your project encounters a major roadblock or even a train wreck, it is critical to identify what went wrong, the factors that led to it and what you could have done differently so that later plan cycles can learn from these experiences. Having a key member of the team regularly provide a blog or mini-report that describes the situation can be very worthwhile. We have so often seen that one cycle's "failure" to reach an objective often results in successes in later cycles because of the valuable information that is often gleaned when things do not go so well. The key is learning from past mistakes.

One strategy for documenting organizational strategies and lessons learned is to create a shared data file where team members can briefly describe the path they took and make recommendations for the future. Consistency over time is key. If all team members were required to spend 20 minutes a week jotting down this information, at the end of a three year cycle there would be wealth of information which could inform not only your final evaluation report, but also future plans.



This data can be generated by individuals or in staff meetings where team members can share information on how obstacles were overcome, and what they would have done differently if they were to do it again, and so on. And of course, this documentation doesn't need to be high tech. It could be as simple as keeping handwritten notes in a binder or in a Word document kept on a shared drive. Whichever the method used, it should be something where team members and the project director can easily access it.

Learning from past successes as well as mistakes makes for a much quicker road forward. So take a few minutes right now to document your project tactics and experiences. It will most likely save your project a lot of time and effort in the future!

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