

Learning Lessons about Lessons Learned

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The indicator for something learned is a description of changed thinking, behavior or attitude.

Conclusions without evidence?

I came across some notes I made about ten years ago about “lessons learned.” At the time I was participating in a group exercise to identify lessons

learned from several case studies. The process was to read through the material as individuals and then convene as a group to brainstorm lessons learned. There was some discussion about the value of the statements that emerged but no effort to relate each statement to evidence or to examine it against generally accepted professional knowledge.

Something was wrong with this picture. Finally it dawned on me that “learned” means changed behavior. You have not learned something until you can demonstrate a change in your thinking or your behavior to be consistent with whatever was taught. Before you thought ABC, but now after instruction or reflection you think XYZ. Before you acted this way in a specific situation, but after instruction or reflection you act differently. You learned what was taught.

So one format for a lesson learned is:

- To achieve this objective I did [detailed description of actions]
- Because [detailed reasoning to support actions].
- This is what happened [detailed description of actual results].

- Reflecting on the results here are the positives and negatives.

- To achieve this objective in the future I will [detailed description of actions to enhance the positives and counter the negatives]
- Because [detailed description of changes in the rationale]
- I expect the following results: _____

- In summary the lesson(s) learned: _____

Hard-headed analysis is required to complete such a format.

Think about this

Then I read three articles that confirmed my uneasiness with the lessons learned exercise. I encourage you to ponder the articles to stimulate your thinking about best practices and lessons learned through evaluation work. I hope this brief paper leads to lessons learned.

Theme: apply evaluation expertise to generate sound knowledge.

“Widespread and indiscriminate use of the terms ‘lessons learned’ and ‘best practice’ has devalued them both conceptually and pragmatically because they lack any common meaning, standard, or definition.” (Patton, 2001, p.330)

With insightful satire Patton examines the hue and cry among and within organizations for satisfying a growing hunger for knowledge. He illuminates the “band wagon” effect around this topic, and offers suggestions for meaningfully responding to the legitimate need to act on sound knowledge.

What is meant by best practice? What does it mean to learn a lesson? What is evaluation’s role in an organization acquiring knowledge? Patton offers a definition for high-quality lessons learned and questions for generating them.

Evaluators need to pay attention to the knowledge management rhetoric, for it is influencing views of stakeholders about what findings evaluators should produce. Increasingly evaluators are expected to “learn lessons (local knowledge about what works) and convert them to best practices (universal knowledge about what works, at least by implication of being *best*).” (Patton, 2001, p. 330)

After examining many lists of lessons learned and best practices, Patton concluded that there is no systematic way to tell a learned lesson from a best practice. “Seldom do such statements identify for whom the practice is best, under what conditions it is best, or what values or assumptions undergird its *best-ness*.” (Patton, 2001, p. 330) Lack of contextual description is the major problem with such statements. “‘Best practices’ that are principles to guide practice can be helpful. ‘Best practices’ that are highly prescriptive and specific represents bad practice for best practices.” (Patton, 2001, p. 331)

Patton (2001) describes two primary uses for evaluation findings.

- *Instrumental use* refers to decisions or actions taken based on findings.
- *Conceptual use* refers to influence on thinking or understanding rather than decision making or action. It involves increasing knowledge of some type. Discussion of “best practices” is discussion about conceptual use of evaluation findings. As the field of program evaluation has grown, knowledge about sound evaluation methodology and patterns of program effectiveness has grown. What we say about these things should be consistent with that knowledge.

High-quality lessons learned.

Characteristics of high-quality lessons learned include:

- Support from multiple sources, such as program practitioner experience, program participant experience, patterns across program evaluations, expert opinion, cross-disciplinary connections and patterns
- Logical support by rigorous relevant evidence (contextual descriptions)

- Similar conclusions from different perspectives (triangulation)
- Significant potential for application in a variety of contexts

A lesson that has only one source of support is regarded as a “lessons learned hypothesis” in need of additional support prior to application.

Ten questions for generating high-quality lessons learned (Patton, 2001, p. 335).

- What is meant by a “*lesson*?”
- What is meant by “*learned*?”
- By whom was the lesson learned?
- What’s the evidence supporting each lesson?
- What’s the evidence the lesson was learned?
- What are the contextual boundaries around the lesson (that is, under what conditions does it apply)?
- Is the lesson specific, substantive, and meaningful enough to guide practice in some concrete way?
- Who else is likely to care about this lesson?
- What evidence will they want to see?
- How does this lesson connect with other “lessons?”

Weiss (2002) affirmed the major point of Patton’s article and called for more humility in what evaluators promise to sponsors and clients. Patton eloquently extended her call for humility.

“The language of ‘best practices’ has emerged as a way of enlisting science in political and ideological wars. Ideology thrives on certainty. Humility, in contrast, embraces uncertainty. Certainty fosters ideological orthodoxy, intolerance, self-righteousness, and pride. In discussing the seven deadly sins – anger, covetousness, envy, gluttony, lust, sloth, and pride – Saint Thomas Aquinas considered pride to be chief among the deadly sins, not because of its inherent gravity, but because of its potential for leading to still other sins. There’s pridefulness in proclaiming that one is practicing what is ‘*best*.’” (Patton, 2002, p. 232)

“Instead of supporting the search for *best-ness*, we could be fostering dialogue about and deliberation on multiple interpretations and perspectives.... [W]e could employ the more humble language of ‘effective practices’ or ‘evidence-based practices’ and, in so doing, focus on both the strengths and limitations of the supporting data.” (Patton, 2002, p.232)

“What is at stake is the extent to which our profession [of evaluation] can model the dialogic processes that support and nurture democracy and peace, thereby helping to create a context in which humility is possible and valued, and contribute thus not just by the findings we generate, but more crucially and with longer effect, by the way we facilitate engagement with those findings – fostering mutual respect among those with different perspectives and interpretations. That modeling of and nurturing deliberative, inclusive, and, yes, humble

dialogue may make a greater contribution to societal welfare than the search for generalizable 'best practice' findings, which rapidly become outdated anyway." (Patton, 2002, p. 233)

Final thought

Develop your own formats for describing high-quality lessons learned. Let's make the term meaningful.

References

Patton, Michael Quinn. (Fall 2001). Evaluation, knowledge management, best practices, and high quality lessons learned. *American Journal of Evaluation*, 22(3), 320-336.

Patton, Michael Quinn Patton. (Spring 2002). Weiss' call for humility: Further reflections. *American Journal of Evaluation*, 23(2), 231-233.

Weiss, Carol H. (Spring 2002). Patton's (2001) 'Lessons learned:' A comment. *American Journal of Evaluation*, 23(2), 229-230.