

LESSONS LEARNED METHODOLOGY AND PLANNING WORKSHEET

LESSONS LEARNED METHODOLOGY

Lessons learned evaluations can be highly informative resources that assist development and implementation of future project operations, strategic planning, goal setting, and tactical decision making for a reinstated campaign. They should be planned in advance and executed incrementally as the campaign concludes.

The evaluation aims will depend on the scope and nature of the campaign, the context of the public health emergency (PHE), and consideration of what insights are most valuable and actionable to internal and external stakeholders. These aims will determine what questions are asked, and the data collection methods used to ask those questions.

Evaluation questions may be broad, for example:

- What did we do well?
- What could we have improved?
- How well did we anticipate new challenges or barriers?
- What is the one thing you think would have helped to know before beginning this project?

Or, they may be specific to campaign tasks, such as:

- How can we improve the overall efficiency of the inputs from the modeling process to our planning and roll out?
- How could we have better identified which social media influencers have broader influence scores?
- How could we better identify sources for data collection?

Evaluations may draw on a variety of qualitative and quantitative data sources, including:

- Monitoring and evaluation metrics
- Project tracker
- Project document review
- Workshops or listening sessions
- Interviews

LESSONS LEARNED EVALUATION CHECKLIST

Review existing project documents for context and objectives for each individual campaign task

Conducted listening sessions with individual task teams to ascertain what worked well and what could be improved in each area.

Develop a semi-structured listening session protocol to include open-ended discussion questions, tailored to each individual campaign team's objectives and specific context. Include prompts to encourage additional thinking and further the dialogue,

Identify tools that could be used to facilitate the discussions (i.e., the online whiteboarding tool Mural to allow participants to add comments sync synchronously, collaborate on comment affinity grouping, and vote on the most resonant comments).

Code qualitative comments for themes.

Conduct a simple content analysis to thematically code data and identify the most salient themes.

Draft lessons learned based on the themes identified in the data and attention to stakeholder needs and priorities for each task area.

Develop recommendations based on lessons learned to improve task outcomes and team performance.

Apply relevant recommendations as outlined in Sections 4 (monitoring and evaluation) and 5 (refinement) of the Playbook for application of learnings and recommendations.

LESSONS LEARNED EVALUATION PLANNING

Consider the following to plan the lessons learned evaluation for your campaign. Use the worksheet below to build the lessons learned plan.

- Data collection method
 - Broader questions and ones without quantifiable measures or metrics may be better suited to qualitative methods
 - Narrower or more quantifiable questions may be better suited to quantitative methods
- Data source. What data source will best answer this question? Is it a data source the campaign already has access to, like a project tracker or project documents? Or will data need to be collected from a new source?
- Data analysis methods should be determined after identifying the appropriate data source,.
- The tools needed to collect and/or analyze data. Tools may include software or web platforms, or physical materials like whiteboards, sticky notes, or a digital recorder.

LESSONS LEARNED PLANNING WORKSHEET

Question	Data Collection Method	Data Source	Data Analysis Method(s)	Data Collection & Analysis Tool(s)	Team Member
<i>What did we do well?</i>	<i>Qualitative</i>	<i>Listening Session</i>	<i>Affinity mapping, thematic coding</i>	<i>Mural, Virtual meeting platform with video recording, Microsoft Excel</i>	<i>A, B, C</i>
<i>Did outreach cold calls work as well as personal introductions?</i>	<i>Quantitative</i>	<i>Project tracker</i>	<i>Descriptive statistics</i>	<i>Microsoft Excel</i>	<i>D</i>