Project management for researchers and evaluators

Identifying our "lessons learned"

Debriefing is a useful strategy to help project teams build on successes and develop recommendations for improvement

We all know the satisfaction that comes from finishing an evaluation or research project. This satisfaction may be accompanied by a sense of loss, if we will be completing work with clients or collaborators with whom we enjoyed working. We may be feeling relief that a particularly challenging (or sometimes even contentious) project is behind us. And often, we are looking ahead, eager to jump into the next project.

Before moving on to the next priority, it can be extremely helpful to pause and to reflect on the project that has been completed. **Debriefing** (also sometimes referred to as a "post-mortem" review) is a structured learning process designed to identify our successes and lessons learned, and to develop strategies for using that information to continuously improve our research and evaluation practice.

Why should I debrief a project?

There are several advantages of debriefing a project. Debriefing provides an opportunity to reflect on strategies that worked well, and those that did not. With some planning, these insights can be thoughtfully applied to build our future practice, building on our successes and reducing challenges.

Debriefing also provides an important opportunity for team building. When a full project team debriefs together, we can share perspectives, build consensus, and develop strategies for strengthening future teamwork.

> "We do not learn from experience…we learn from reflecting on experience."
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> - John Dewey

Who should debrief a project?

Ideally, everyone who was involved in a project should participate in a debriefing. If you had a research or evaluation team, everyone who was instrumentally involved in carrying out the project should be invited to participate.

It is also very helpful when the debriefing reflects the voices of your customers, collaborators, or other stakeholders. During a debriefing process, it is important to dig deep into understanding team dynamics and identify challenges that occurred. It is generally not desirable to have our clients in the room when this happens. However, consider bringing feedback from the client in other ways. For instance, it can be helpful to have a separate conversation with them, or to use a feedback survey, to collect their feedback about project successes and challenges and assess their satisfaction with the project.

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When should my project be debriefed?

Conventionally, a debriefing is held when a project is completed. However, depending on your project, it may be helpful to have "mini-debriefings" following various project phases, such as when you are wrapping up a large data collection activity. It may also be helpful to incorporate some debriefing activities when a significant challenge in the project has been addressed.

How should my project be debriefed?

There is no one "right" way to conduct a debriefing. A variety of structured facilitation processes may make sense for your project and your team. The following tips can help ensure that your debriefing is successful.

Tip: Create a positive environment

Perhaps the most important component of conducting a useful debriefing is creating a positive and open environment for the discussion. Celebrate the project accomplishments, and the contributions of each team member. Consider meeting outside of the office, or bringing snacks, or other strategies to make the debriefing feel "special," and not just another meeting to attend.

Because it is important in a debriefing to also identify the challenges and to learn from these challenges, the team should focus on collective reflection and learning. It can be helpful to set some ground rules in advance, such as being open to learning, minimizing defensiveness, and avoiding blame.

If significant conflict or team member performance issues emerged during the project, this should be addressed separately and not aired as part of a debrief meeting. The debriefing will not be successful if the focus is on complaining and blaming, rather than on collectively reflecting on our experience and improving our practice.

Tip: Try to identify the "root causes" for project successes and challenges

Your debrief should go beyond the surface in understanding project successes and challenges. For instance, rather than simply noting that a project went over budget, try to identify why it went over budget. Did a task take longer than expected, increasing expenses associated with staff time? Did you omit something that should have been included in the budget, such as not anticipating costs to translate data collection materials? Similarly, rather than just noting that a project met its deadlines, identify what helped lead to this success. Did you develop project timelines at the beginning that were feasible and appropriate? Or did you need to adjust roles and resources along the way to keep the project on track?

Tip: Plan ahead

While a debriefing should provide an open forum for team members to share their experiences, it is helpful to have a structure in place for the process. Know ahead of time how the discussion will be organized, and what questions need to be answered. You may want to create an organizational debriefing framework that is applied consistently. Having an approach for debriefing allows team members to prepare for the discussion, anticipate what is going to happen, and feel more comfortable with the process.

Tip: Ensure all voices are heard and respected

Be aware of power dynamics and ensure that all team members are heard in the process. It can sometimes be helpful to have someone other than the project lead facilitate the meeting.

What should be addressed in a project debriefing?

The following page illustrates some potential questions to include in a project debriefing. Questions should be appropriate for your project, team, and organization. However, in general, a debriefing is intended to address the following issues:

- What actually happened?
- What were our project successes and challenges?
- What do we wish we had done differently?
- How can we use this information to improve future projects?

Sample debriefing questions

The questions to be explored during a debriefing need to align with your project, your team, and your organization. However, these are some typical debriefing questions that can get you started.

- What were the project goals? Did everyone on the project team have a shared understanding of the project goals when they started the project?

- Did we complete the project on time and on budget? If so, what helped us reach our targets? If not, what caused us to go over budget or to miss deadlines?

- What challenges emerged in the course of the project? How were these challenges managed? Did we anticipate and plan for these challenges in advance, or were they surprises?

- How satisfied is the customer with the project? What feedback did they provide? What aspects of the project went well from their perspective, and what do they wish had happened differently?

- Did the scope of the project change along the way? If so, why? Were changes in scope appropriate? Did we effectively manage the impact of scope changes on our budget and timelines?

- How effectively did the team communicate with each other through the project?

- Were the roles of each team member clear and appropriate? Did team members have a shared understanding of these roles and responsibilities? Did roles align with team members' skills, interests, and capacity?

- Did each team member have the necessary training and skills to complete their tasks? If they had questions or faced challenges along the way, did they receive help from the team?

- Were project meetings (with the team, the client, or other partners) effectively organized and managed?

- What did team members find most rewarding or enjoyable about their work on this project? What did they find most challenging?

- Did we deliver a high-quality product to the client (such as reports or other materials)? Did the product meet their needs? If not, why not?

- Was the team able to dedicate enough time to project quality controls (such as double-checking the analysis or coding, or proofreading the report)? If not, how did this impact overall project quality?

- What did we learn, individually or collectively, from our work on this project?

- How effectively did the team work together to coordinate tasks and overcome challenges? What, if anything, could the team have done to better support each other along the way?

- Was the selected data collection approach appropriate? Were we able to obtain the information needed to answer core evaluation questions? What would have made our approach stronger?

- Did we bring in any new innovations or approaches (such as trying a new community engagement approach or an emerging data collection methodology)? If so, how did that work and what did we learn from the experience?

- Overall, what do we wish we had done differently? What should we do differently on future projects?

How do I use the lessons learned?

A variety of useful learnings and recommendations can come from your project debriefing. It is important to not just move on to the next project or meeting without taking some time to document these learnings and develop a plan to apply the information.

Find a way to capture the lessons learned so that they are accessible to you later. If you work within a larger organization, you may want to build a database or repository of these documents, so that they are widely available to other colleagues as well.

Rather than just creating a long list of successes and challenges, it can be very helpful to turn your notes into a series of recommended action steps and make a plan for implementing them. What kinds of processes or guidelines could help strengthen future projects? What would it take to implement these practices or guidelines? How should recommendations be shared with others in your organization? Who should be responsible for communicating recommendations or implementing changes?

When done well, debriefing can be a relatively simple yet powerful tool for research and evaluation teams. Taking time to reflect on our practice, and developing plans based on these reflections, can be instrumental in building team cohesion, increasing client satisfaction with our work, and strengthening the quality of our projects.

AUTHOR: Cheryl Holm-Hansen, PhD is the founder and principal consultant at Community Research Solutions, LLC. She has more than 30 years of experience conducting community-based research and evaluation projects. A community psychologist by training, she also has a continuing education certificate in project management.