

## LESSONS LEARNED SYSTEM IN THE POLISH ARMED FORCES IN THE YEARS 2006-2012

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### **Abstract:**

*The article presents the genesis and the evaluation of the Lessons Learned System in the Polish Armed Forces in the years 2006-2012. There are described the first attempts, as well as the development of the system approach concept in terms of the collection and practical implementation of experiences gained in the areas of training, exercises and the participation of Polish Military Contingents in operations outside Poland. There were also indicated the most significant documents implying the then system design and principles of its functioning as well.*

### **Keywords:**

*the lessons learned system, lessons learned*

## INTRODUCTION

Lessons learned systems function in majority of NATO member armed forces. In view of calculable benefits in terms of the operational effectiveness improvement and the elimination of possible mistakes repetition in future operations, i.e. as a result of the better preparation to perform the anticipated tasks, the development and the improvement of these systems are given the top priority. The organisational cells created for the aforementioned reasons, functioning in command structures, perform analytic, research and advisory tasks and administrate the central database supporting the system. The systems commonly known as "Lessons Learned"<sup>1</sup> proved the desirability of its existence in the majority of armed forces of the allied states.<sup>2</sup>

<sup>1</sup> Translating the English name of the system and, on this basis, formulating the definition of its Polish

It is worth noting that until the year 2006 in the Polish Armed Forces (SZ RP) the repetitive character of mistakes made, diagnosed in the course of conducted inspections, proved the little effectiveness of analyses and the insufficient level of advantages taken of findings and experiences gained in the process of training of the forces. The main reason for this state of affair was the lack in the structures of the Polish Ministry of National Defence and at operational levels of command the specialised organisational cells that in the professional, planned and desired way could perform detailed analyses of experiences acquired while executing different tasks and duty related activities<sup>3</sup>. Actions taken so as to collect, evaluate and process information, as well as generalise experiences and draw conclusions did not have the system solution nature.

The aim of the article is to present the genesis and the evaluation of the Lessons Learned System in the Polish Armed Forces, from its establishment till the year 2012. In order to achieve the objective set, the authors used the method of analysing documents governing development directions and presumptions of the functioning of the system in the years of 2006-2012.

In 2006, due to growing needs of the Polish Armed Forces resulting in particular from the increased engagement in operations outside the country, in the Training Directorate - J7 the draft of *The concept of functioning of the national system of the experiences collection and dissemination in the Polish Armed Forces* was developed. It was approved by the then Chief of the Polish Armed Forces General Staff. The developed concept assumed the phased system implementation, consisting in the successive extension of areas of interests. At the initial stage, collecting and disseminating conclusions and experiences acquired during overseas operations were planned. The second stage was to include the extension of the scope of interests by conclusions and experiences gained in national and international trainings as well as duty related activities in the forces. In 2007 the Chief of the General Staff of the Polish Armed Forces<sup>4</sup> issued an order that established principles of the functioning of this system in the Polish Armed Forces. It defined deadlines to meet and tasks to accomplish by particular Polish Armed Forces institutions. The function of the system organiser simultaneously responsible for the substantive supervision over the process of collecting and disseminating conclusions and experiences, according to allocated competencies, was assigned to the Chief of the Training Directorate - J7.

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equivalent is really difficult, almost impossible due to its ambiguousness. According to Collins English-Polish Dictionary, the second edition, Polska Oficyna Wydawnicza, 1998: *lesson* – lekcja, nauka, nauczka, *learned* – uczyć się. In the US Army the definition is associated with, among others,: observations, implemented changes, gained experiences, new modus operandi and every kind of activity related to taking advantage of experiences.

<sup>2</sup> K. Gruca *Przygotowanie komponentu wojsk lądowych sił zbrojnych Rzeczypospolitej polskiej do udziału w operacjach o charakterze ekspedycyjnym*, doctoral thesis, AON, Warszawa 2012, p. 101, 102.

<sup>3</sup> Ibidem, p. 103.

<sup>4</sup> *The Chief's of the Polish Armed Forces General Staff order No 180 of 23<sup>rd</sup> of February 2007 on launching in the Polish Armed Forces the national system of collecting and disseminating experiences gained while conducting overseas operations.*

Having regard to the need of the further system development, based on the order No 631/Szkol/P7 of the Chief of the Polish Armed Forces General Staff of 1<sup>st</sup> August 2008, the working team responsible for the preparation, organisation and implementation of the national system of the collection and dissemination of conclusions and experiences, covering all functioning areas in the Polish Armed Forces, was set up. As a result, taking into account conclusions drawn after one year of the system operating, as well as the results of the problem inspection conducted in the Polish Armed Forces in 2008 by the Ministry of National Defence Control Department on *“The utilisation of experiences gained while conducting tasks by Polish Military Contingents (PKW) outside Poland”*, the Deputy Chief of the Polish Armed Forces General Staff issued the guidance on the national system of the collection and dissemination of experiences in the Polish Armed Forces.<sup>5</sup> It aimed at improving tasks performance stated in *the order of the Chief of the Polish Armed Forces General Staff No 180 of 23<sup>rd</sup> February 2007 on launching in the Polish Armed Forces the national system of collecting and disseminating experiences gained while conducting overseas operations*. At the same time, *the guidance on launching in the Polish Armed Forces the national system of collecting and disseminating experiences gained while conducting overseas military operations issued on 15<sup>th</sup> March 2007 by the Deputy Chief of the Polish Armed Forces General Staff* was repealed.

As for organisation of the system, the new guidance specified its three main areas of functioning:

- overseas operations;
- armed forces training;
- exercises (national and international).

The guidance also specified tasks for particular organisational cells of the Armed Forces. The tasks mainly consisted in the obligation to analyse submitted conclusions and experiences within the scope of interest, resulting from the Armed Forces' overseas operations, national and international exercises, the training process implementation and also proposing solutions (corrective actions) and monitoring their fulfilment, in accordance with the competencies. It was allowed to create (on the request of Chiefs of the Armed Forces organisational cells) interdisciplinary expert teams in order to analyse submitted conclusions, as well as determine and launch their implementation procedures. Problems and corrective action proposals beyond competencies of organisational cells commanders (chiefs) were sent to the Training Directorate - J7. The Training Directorate - J7 in parallel with holding the function of the system organiser and coordinator was also responsible for maintaining the Central Database (CBD). “Unclassified” and „Restricted” information collected in the Central Database was published on the Training Directorate - J7 web page in the WISE system via MIL-WAN computer network<sup>6</sup>. The Deputy Chief of the Polish Armed Forces General Staff supervised the

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<sup>5</sup> *The Deputy Chief's of the Polish Armed Forces General Staff guidance on the national system of the collection and dissemination of experiences in the Polish Armed Forces*, dated 24<sup>th</sup> March 2009.

<sup>6</sup> *Compare: The Deputy Chief's of the Polish Armed Forces General Staff guidance on the national sys-*

functioning of the national system of collecting and disseminating experiences in the Polish Armed Forces. In the competence-task guidance the appropriate cells for conducting analyses of conclusions and experiences in the particular areas of interests were defined.

The solutions adopted for the needs of functioning of the Lessons Learned System in the Armed Forces were constantly improved. Subsequent documents regulated and harmonised the way the system was operating. Following the conclusions from the functioning to date, the need for permanent improvement of solutions being adopted in the Lessons Learned process, together with maintaining the coherence with the allied approaches, were taken into account. Simultaneously to the division of competencies and tasks between the personnel and organisational structures of the Polish Armed Forces, the documents specified the course of action from the moment the observation occurs until the moment the corrective actions are implemented and experiences disseminated (Figure 1).

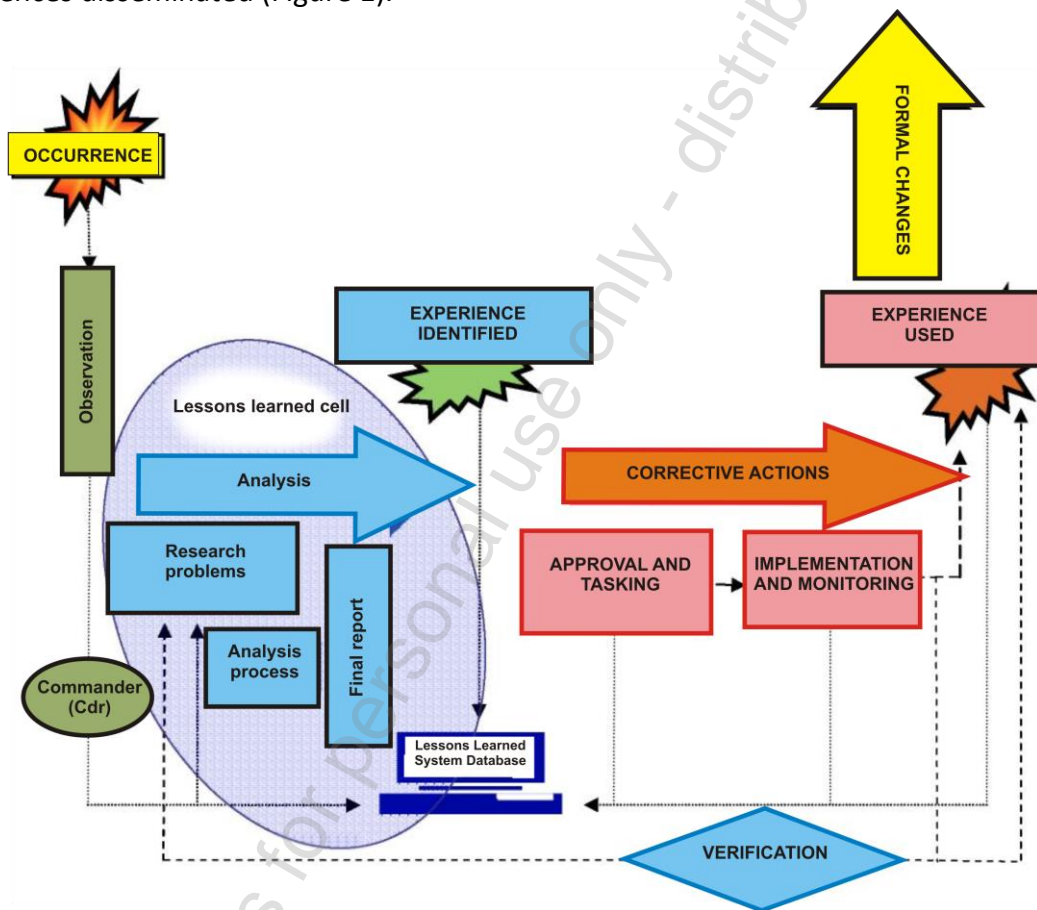


Fig. 1. The flow chart of the lessons learned process

Source: *The concept of the Lesson Learned System in the Polish Armed Forces, Warsaw 2009.*

tem of the collection and dissemination of experiences in the Polish Armed Forces, dated 24<sup>th</sup> March 2009; p.3.

Pending the establishment of the Doctrine and Training Centre of the Polish Armed Forces and issuing Instructions for the Lessons Learned System in the Polish Armed Forces by the Centre in 2011, the functioning of the system had been based on the regulations coming from the below mentioned documents:<sup>7</sup>

- the Chief's of the Polish Armed Forces General Staff order No 180, dated 23<sup>rd</sup> February 2007, on launching in the Polish Armed Forces the national system of the collection and dissemination of experiences gained while conducting overseas operations;
- The Deputy Chief's of the Polish Armed Forces General Staff guidance on the national system of the collection and dissemination of experiences in the Polish Armed Forces, dated 24<sup>th</sup> March 2009;
- The Lessons Learned System Concept in the Polish Armed Forces dated 17th March 2009.

The Doctrine and Training Centre of the Polish Armed Forces acted as the organiser of the Lessons Learned System in the Polish Armed Forces and was responsible for its functioning, additionally it maintained the Central Database (it has been still doing so). The Centre presented to the Chief of General Staff of the Polish Armed Forces conclusions and proposals regarding strategic analyses, specified corrective actions beyond the competencies of the Operational Command, Armed Forces Headquarters, the Support Inspectorate, and the Military Health Inspectorate of the Polish Armed Forces<sup>8</sup>.

The Lessons Learned process through common regulations functioned based on the same principles like in other NATO countries. The operational algorithm covered the following stages:<sup>9</sup>

- the identification of the observation;
- the analysis;
- the approval of corrective actions and the staff responsible for their implementation, as well as tasking;
- the changes implementation and monitoring;
- the verification of adopted solutions.

The identification of the observation is directed towards the need to specify the recurrent problems or negative phenomena, and also the so-called "good practice". The identification of the observation consists in the collection and interpretation of data that allow qualifying the problem. All soldiers can report observations. The notification of the observation connected with the occurred problem or inefficiency initiates the functioning of the system. This fact is documented on an observations log that goes to

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<sup>7</sup> K. Gruca, *Przygotowanie komponentu wojsk lądowych sił zbrojnych Rzeczypospolitej Polskiej do udziału w operacjach o charakterze ekspedycyjnym*, doctoral thesis, AON, Warszawa 2012, p. 101, 102.

<sup>8</sup> Compare: W. Fiderek, *System wykorzystania doświadczeń w WLqđ*, Land Forces Review, No. 2(056), Warszawa 2012, p. 40.

<sup>9</sup> *Instrukcja systemu wykorzystania doświadczeń w SZ RP*, CDiS SZ, Bydgoszcz 2011, p. 16.

the personnel responsible for implementing the lessons learned process. The log contains data of a submitter, the area of duties, which the observation refers to, the reasons and the description of the occurrence, and also the possible recommendation on corrective actions. Obtained data are verified in order to specify their objectivity, exclude complaints and denunciations, as well as evaluate the character of the problem (system, human fault). The financial implication resulting from the implementation of corrective actions is taken into account as well. Verified observations are presented as proposals of a problem to analyse within the lessons learned process. Being approved for further proceedings, they are located in the database created for the needs of the operation as identified observations.

The analysis was conducted in order to specify and understand factors causing an observed phenomenon, and connections between them. This stage covered the following phases:<sup>10</sup>

- the preliminary analysis;
- the information (data) acquisition;
- the analysis of the identified observation (the problem to analyse) and data acquisition;
- the agreement on the draft of the analysis final report;
- the analysis final report development;
- the project closure.

The analysis was usually conducted by the element of the organisational structure in which the observation occurred, and by specialists of the adequate Lessons Learned System structure. In the situation where solving the problem was beyond competencies of the abovementioned structures, e.g. in the case of the lack of experts in a particular domain, a request was sent to major superiors. If a phenomena analysis or suggested corrective actions were beyond competencies of the major superiors, submitted observations were directed to the adequate Lessons Learned System organisational structure. Then, working groups consisted of specialists, managers and relevant experts were appointed at particular Lessons Learned System organisational levels for complex problems solving purposes. Recommendations regarding corrective actions and entities responsible for their implementation resulted from the conducted analysis.

At the stage of corrective actions and the responsible personnel approval, as well as tasking, conclusions and recommendations included in the analysis final report were submitted for validation to the commander in charge of tasking. In the Corrective Actions Plan there were incorporated the location and the type of activities, resources envisaged for conducting a task, as well as the entity and deadlines of the recommended projects.<sup>11</sup> It was possible to perform a similar activity in the allied chain of command, if for instance, the scope of the corrective actions fell within the competen-

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<sup>10</sup> Compare: Ibidem, p. 20-21.

<sup>11</sup> Compare: Ibidem, p. 22



cies of the allied task force commander. As a result of having the Corrective Actions Plan developed and approved, the identified observation became the identified experiences.

The implementation of the corrective actions was the responsibility of the entity appointed in the Corrective Actions Plan. Reports on performed tasks, according to the deadlines included in the schedule, were sent to the person approving the plan. Monitoring of the implemented changes was the responsibility of the adequate Lessons Learned System structure.

The verification specified the efficiency of the lessons learned process in terms of conducted analyses and corrective actions, undertaken in order to eliminate the observed problem. In accordance with the assumptions, the verification of conducted corrective actions should aim at the eradication of the root-causes of the problem. If the corrective process evaluation proved that the action taken had not eliminated root-causes, the whole process started again the analyses stage, in which the course of action was redefined.

In duly justified cases, corrective actions were taken immediately after the identification of the problem and after being approved by the authorised personnel. Each activity of this type should have been submitted to the Lessons Learned System organisational structures and registered.

All the unclassified and restricted information, conclusions and lessons learned were collected in the Central Database. They were made available in the WISE system via MIL-WAN computer network. The information flow was realised both on the registry system basis and electronically as well. The submitted and implemented conclusions sent by entities (as electronic or hard copies) were gathered in the Central Database. Its users were merely soldiers and the Armed Forces civilian workers with the access given by the Doctrine and Training Centre. The usage of the Central Database was specified in "The Lessons Learned System Central Database User Instructions"<sup>12</sup>.

The schematic diagram of the Lessons Learned System is depicted in the Figure 2.

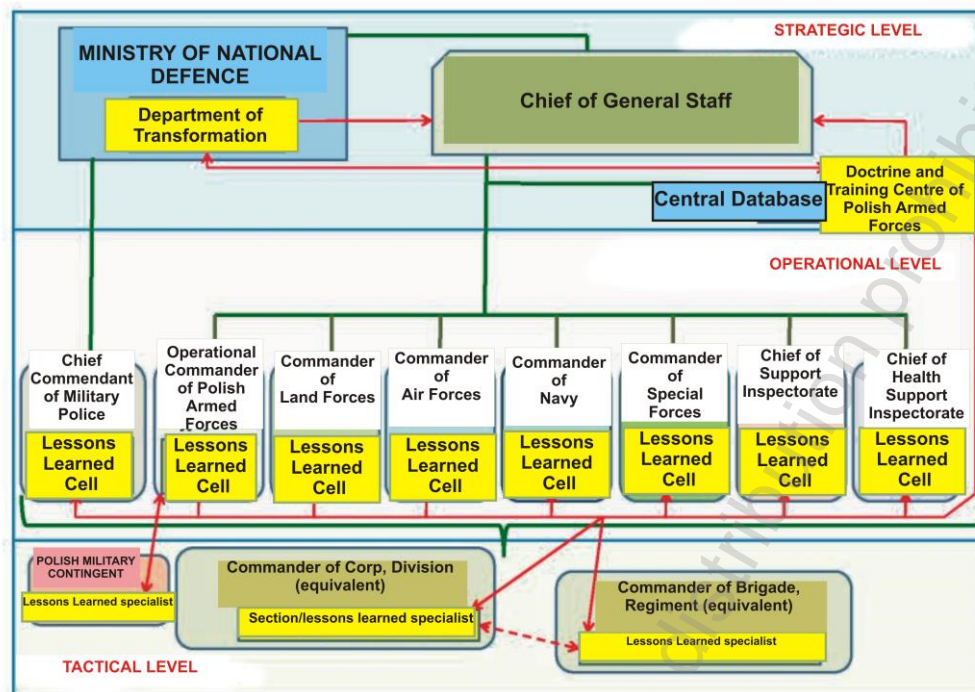
Military education institutions as the competent authorities to implement solutions and experiences gained during overseas operations, to train the forces and conduct exercises within academic activities in order to prepare the command staff for the needs of the Polish Armed Forces, should have done the above in accordance with regulations specified by the Director of the Military Education Department of the Polish Ministry of National Defence.<sup>13</sup> Following the provisions contained in "The Instructions of the Lessons Learned System in the Polish Armed Forces", the rules of functioning of the system in military higher education institutions was to be stated in

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<sup>12</sup> Compare: Ibidem, p. 15

<sup>13</sup> *The Deputy Chief's of the Polish Armed Forces General Staff guidance on the national system of the collection and dissemination of experiences in the Polish Armed Forces, dated 24th March 2009, p.8.*

a separate document<sup>14</sup>.



Legend:

- the direct cooperation resulting from the organisation of the Lessons Learned System
- - - → the Lessons Learned System execution based on the partnership cooperation

Fig. 2. The schematic diagram of the Lessons Learned System

Source: *Instrukcja Systemu Wykorzystania Doświadczeń w Siłach Zbrojnych RP, the Doctrine and Training Centre of the Polish Armed Forces, Bydgoszcz 2011*

Currently, the Lessons Learned System in the Polish Armed Forces functions based on the regulations described in the amended instruction issued in 2014 by the Doctrine and Training Centre of the Polish Armed Forces. The essential assumptions of the functioning of the system remained unchanged, however the main difference is the number of institutions and organisational cells that are covered by the system activity. The previous instruction limited functioning of the system to the units and cells subordinated to the Chief of the General Staff, while at present all the elements it covers are subject to the Ministry of National Defence.<sup>15</sup> The implementation of the new instruction was dictated by the reform of the command organisation in the Polish Armed Forces.

In summary it must be stated that the year 2006 can be treated as the beginning of the system approach to the issues of gathering and using experiences in the Polish Armed

<sup>14</sup> Compare: *Instrukcja systemu wykorzystania doświadczeń w SZ RP, CDiS SZ, Bydgoszcz 2011, p. 8.*



Forces. It was dictated both by NATO interoperability demands and by the needs coming from the increasing the Polish Military Contingents' engagement in the overseas operations.

From the moment of its establishment, the assumptions of functioning of the national Lessons Learned System have sanctioned it as the main source of lessons and conclusions used at the stages of planning as well as fulfilling organisational-training projects in the Polish Armed Forces. It was mainly related to the area of preparations for operations outside our country. The experts opinions, including persons directly engaged in functioning of the system in the period considered, and the authors themselves, who should be the beneficiaries of the effects of its functioning, point out some inefficiencies within this scope. One of the prerequisites determining the proper functioning of the system was its universality. It was assumed, that anybody interested could be the source of experiences, which in the case of the lack of the knowledge about the functioning of the system (or even about its existence) limited its efficiency. The access to the Central Database, that could be only obtained via the restricted network MIL-WAN caused the important shortcoming. The lack of the faith in the system efficiency was not uncommon. However, seeing the dynamic system development, as well as the measurable benefits of the operational effectiveness improvement, it is worth noting, that the development and the improvement of the system was treated as a priority. Currently, it is one of the core systems associated with all the Polish Armed Forces' areas of interest.

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