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The Four Lenses and Context Checklist

Chapter 5 introduced four lenses for developing understanding: Evidence, Context, Expertise, and Lived Experience. In practice they overlap. A nurse describing a shift may contribute all four in one conversation, and we don't need to stop that conversation to sort it into categories. The questions below are here to help you notice which perspective is thin before the decision is made.

Choose the questions that fit the decision. A small practice might work through them in a few conversations with staff, patients, and an outside specialist. A health system considering a broad deployment may need several teams and a more formal review. Either way, the purpose is to find what could change the choice or the implementation.

Evidence: What Supports Our Understanding?

- What was tested, on which people and settings, and with which version of the product?
- Does the evidence address the benefit we're counting on, or a related task? A tool can predict something accurately without helping anyone act on the prediction.
- Which findings make the proposal less convincing? Has someone looked for the conditions under which the tool performs poorly?
- How were our own records produced? Is there a field we're about to rely on that needs explanation first?
- What important part of the expected benefit hasn't been demonstrated?

Context: What Surrounds the Decision?

- What are the staffing, resources, and working conditions this use would depend on?
- What has changed recently, and what happened the last time a similar change was introduced?
- Who maintains the information, the process, or the system the tool would rely on?
- Which interests surround the proposal? A vendor, a sponsor with a launch date, or a department under pressure to improve a measure may each draw attention to some questions more than others.
- What would need to change here for the proposal to work?

Expertise: Who Can Help Us Interpret What We Find?

- Whose knowledge does this decision need: clinical, technical, operational, analytical, or familiarity with a particular population?
- Where does each person's expertise end, and who else should be involved?
- What reasoning sits behind each judgment? What would change the recommendation?
- Are the experts involved while the plan can still change, or only reviewing a nearly finished implementation?

Lived Experience: What Is This Like for the People Affected?

These are the questions from Chapter 5 that I would begin with. Ask them about the work before asking about the tool.

- What are you trying to accomplish?
- Where does the process make that difficult?
- What happens when the usual approach doesn't work?
- What would you want us to understand before changing it?

Then consider whose experience you haven't heard. The staff member available for a midday meeting may work under different conditions from a colleague covering evenings. A patient comfortable with an online survey may face different barriers from someone who doesn't use the portal. Plan how you will tell people what their input changed.

When the Lenses Don't Agree

A report may show improvement while staff say the work has become harder. Before accepting either account, find out what each one measures. Look at the relevant records, observe the steps, and ask people to explain specific examples. Bringing the lenses together doesn't mean giving every statement equal weight, and it doesn't

require everyone to agree. It means understanding the disagreement well enough to explain the decision and what would cause you to reconsider it.

Four Lenses Record

DECISION _____

DATE _____

1 Evidence

Relevant findings, their sources, and their limits. What important part of our expected benefit has not been demonstrated?

2 Context

Conditions, resources, history, and constraints that affect this use. What would need to change here for the proposal to work?

3 Expertise

Relevant judgments, the reasoning behind them, and unresolved disagreements. What requires knowledge we haven't yet involved?

4 Lived Experience

What affected people describe and whose perspectives are missing. What problem do they think needs to be solved?

5 What changes the decision

The weakest part of our current understanding, who will investigate it, and when we will revisit it.
