

## Implementing a Learning Agenda Approach

The federal government is working to create a smarter, more innovative, and more accountable government for the American taxpayer. As stated in [OMB Memorandum m-13-07](#), the government should continually improve program performance by applying existing evidence about what works, generating new knowledge, and using experimentation and innovation to test new approaches to program delivery.

The government must rely on the best available evidence to rigorously and credibly document program effectiveness, make hard choices, and learn more systematically what works, for whom, under what circumstances. Where evidence is lacking for important policy and program implementation areas, government must help to develop rigorous evidence.

Creating an agency that maintains a culture of learning and continual improvement requires many types of evidence that includes evaluation as well as descriptive research studies, performance measures, financial and cost data, survey statistics, analytical modeling, or using administrative data for analytical purposes. Further, continual improvement requires systematic approaches to using information, such as regular data-driven reviews of performance and progress. Agencies may be doing some of these activities separately but a learning agenda approach establishes a systematic process by which these activities can be strategically organized. Several agencies have implemented learning agendas to coordinate their work around research and evaluation such as HUD with their Research Road Map, DOL with their approach focused on targeting program offices to prioritize and target research questions, and US AID's publication of their [Evaluation Policy](#) in 2011 to create a culture of learning around evaluation and evidence. There are many ways to implement a learning agenda; starting the process may be the most important step. The actions below may help you begin the process of implementing a learning agenda in your agency.

### What is a Learning Agenda?

A learning agenda is a set of broad questions directly related to the work that an agency conducts that, when answered, enables the agency to work more effectively and efficiently, particularly pertaining to evaluation, evidence, and decision-making. Once the questions are identified, a learning agenda also prioritizes and establishes a plan to answer short- and long-term questions of the highest value across relevant program and policy areas. The process for creating a learning agenda includes *gathering stakeholders; reviewing the literature for what is already known about the topic; identifying and prioritizing the right questions to improve program effectiveness; developing a plan for answering those questions; implementing studies and analyses; involving key stakeholders; and acting on the findings through dissemination and diffusion of evidence* around what works, for whom, and under what circumstances to program managers and agency leadership. Embedding collaboration, coordination, learning, and adaptation agency-wide can help maximize program results through evidence-based decision making.

Implementing a learning agenda approach creates an environment that encourages individuals, offices, and teams to reflect on and learn from their experience and from others. It also requires developing a planned approach to learning in the context of evidence-based decision-making and improving program performance through evaluation and analysis. A learning agenda should be flexible and also reinforce and maximize efforts throughout the life of a program, and once integrated into agency processes, help staff and partners learn rapidly to enable iterative course corrections.

Establishing a learning agenda approach to help creating a culture of learning and evaluation takes specific actions:

- Bring important stakeholders together to *identify and prioritize* the questions that need to be answered to improve program effectiveness and build evidence and make strategic decisions about the key questions that will help your agency the most;
- *Develop a plan* for how to answer the questions using the most appropriate tools and methods;
- *Implement* studies and analyses based on the strongest available methods;
- *Involve key stakeholders along the way* and
- *Act* on the results of what is learned by disseminating findings for program improvement

**A strong learning agenda approach should:**

- **Maximize results** by helping agency and implementing partners learn more quickly and make iterative, timely course corrections;
- **Reinforce the strategic direction** of agency programs and policies by including learning in all parts of program design and implementation;
- **Adapt** programs as evidence and context shifts; and
- Help the agency, implementing partners, and others **identify and focus on priorities** to maintain and strengthen strategic direction.
- **Remain flexible.** Although the learning agenda may be formally updated on a particular timeline (e.g. once a year), it should not unnecessarily bind agencies or discourage new ideas and updates.
- **Accommodate short and longer-term priorities** and intentionally build evidence over time towards strategic objectives.

## Steps to Implementing a Learning Agenda

A key point to remember in implementing a learning agenda is that agency approaches should be tailored to their needs in order to be most effective. Because a learning agenda can take time to implement, there are additional actions your agency can take to encourage or create an environment focused on evidence-based decision-making or conducting rigorous analyses and evaluations. These activities could include developing an evaluation policy for the agency such as those from [DOL](#) or [ACE](#); ensuring a centralized analysis and evaluation function in your agency; ensuring a consistent source of funding for analysis and evaluation in your agency; recruiting, training, and retaining qualified evaluation and analytical staff; and building the knowledge base of senior leaders about evidence-based decision-making. While these actions are all in support of the learning agenda approach, they do not all need to happen to implement a learning agenda. The following steps are an outline of ideas on how to begin implementing a learning agenda at your agency.

**Action 1: Gathering Stakeholders**

In order to identify the highest priority questions for the agency and the components, a learning agenda should take into account the perspective of a wide variety of stakeholders. There are generally two categories of stakeholders that agencies should engage:

- **Core implementation stakeholders:** This category includes staff from program, evaluation, performance, statistical, and budget offices—they are the essential stakeholders needed to identify the most pressing questions, and the ones who will be able to act on the information generated through evaluations, analyses, or use of other types of evidence. Building strong collaborations between these stakeholders increases the likelihood that the learning agenda is grounded in the needs of programs, unforeseen problems are addressed in a timely manner, and the resulting evidence will be incorporated systematically throughout program decisions. A strong feedback and communication loop among these parties is essential.
- **Collateral or Policy stakeholders:** This category may include congressional staff, OMB, others in the agency, or external researchers. This group includes those who have a vested and high level interest in the programs' performance and effectiveness. Some agencies may require approval from this group, while others may find engagement with this group may be less-intensive. Regardless of the level of engagement necessary for your agency, always consider providing interested parties with periodic updates, a chance to provide input into the planned learning agenda, and generally encourage their vested interest in the success of your learning and improvement process.

### **Action 2: Identifying and Prioritizing Questions to Improve Program Performance and Effectiveness**

There are limitless things that agencies may want to know in order to improve program effectiveness, but some questions are more central than others and resources are limited. Prioritization allows the agency to make strategic decisions about the key questions that should impact program performance the most. Agencies can use a continuous and participatory approach to identify questions by collaborating with stakeholders to ensure the questions that answer the most relevant issues for increased program performance are chosen. This iterative approach is grounded in continuous learning: testing what works and what doesn't, and aligning interventions and programs with agency priorities and conditions even as they shift. There should be a balance between short- and long-term questions of interest to be able to address policy and program issues happening right now versus those that look at longer-term outcomes. This approach also helps to build ownership of programs and overall capacity in support of stakeholder-owned agendas and processes.

### **Action 3: Develop a Plan**

A plan should state the goals and objectives of the learning agenda, outline priority questions, describe a time-frame for how to answer the questions, and determine what tools are available and what tools are needed to answer the questions of interest. Tools can vary from existing data sources to understanding the various types of methods and materials needed to design an evaluation or study for a program using the most appropriate methods. For example, if you want to understand how to improve your program, you may not need a randomized controlled trial. You may need to improve your performance measures and examine them over time. If you would like to understand if your program is making a difference in a specific outcome, then you may need to use more rigorous methods to answer that type of question. You may also consider stating available resources to carry out activities in support of the learning agenda so staff have some idea of where to begin. This could include ideas on how to strategically leverage existing data to answer components of multiple questions. For example, using existing administrative data sets or linking administrative data sets may provide a low-cost way to answer questions of interest for specific programs.

The best way to ensure collaborating, learning, and adapting approaches are integrated throughout your agency is to develop a plan that supports the implementation of the questions and issues identified in

the previous step as well as a continuous “learning loop” to ensure questions of interest are relevant and activities can shift over time as priorities shift within your agency. Your plan should prioritize specific actions that use collaborating, learning, and adapting to help achieve program improvement results. Staff can and should apply approaches to ensure implementation of studies, analyses, and the process to answer questions identified above are effective, rigorous, evidenced-based, practical, and ensure engagement with appropriate stakeholders.

#### **Action 4: Implementing Studies and Analyses**

Implementation should operationalize the process by which you and your agency have chosen to answer the questions identified and prioritized in your plan. Implementation can and should include a multitude of activities that can include program evaluations and analysis of existing data which could include administrative and performance data. Evaluations may address questions related to the overall performance of the program, the implementation of the program, the effectiveness of program strategies, or factors that relate to variability in effectiveness of the program or strategies. Evaluations can also examine questions related to measurement of progress, such as the reliability of performance data, identifying appropriate goals or targets for performance, and understanding the contextual factors surrounding a program.

#### **Action 5: Act on Findings**

Evaluation findings should be used for program improvement and accountability by program managers and agency leadership. Building evidence through evaluations and analysis and integrating the use of findings and evidence into policy, budget, operational, and management decision-making is key to evidence-based decision making. The credible use of evidence in decision-making requires an understanding of what conclusions can be drawn from the information, and equally important, what conclusions cannot be drawn. Your agency should strive to strengthen the use of evaluation findings and evidence to drive better decision-making and achieve greater impact, particularly for high-cost and high-value programs.

Most of what is outlined in the steps above are activities that you or your agency are likely already doing. The concept of putting those actions and thinking into a conceptual framework of principles and processes that can be applied systematically throughout your agency, and dedicating adequate resources to make it happen are the novelty for many agencies. It is the systematic application, led by people who have the knowledge and resources to carry it out, which enables your agency to be an effective learning organization that uses evidence to make decisions that will improve program performance and effectiveness.

It is important to be realistic about phasing your shift toward a more learning-intensive and adaptive approach. It takes time to become an effective learning organization, therefore have realistic expectations about how quickly an organizational culture may change. The important issue is to prioritize and begin.