Welcome

Compiled in partnership between the U.S. Global Development Lab’s Office of Evaluation and Impact Assessment (Lab/EIA) and the USAID LEARN contract, Learning (in the) Lab: A Utilization-Focused Learning Playbook is designed to share with our colleagues the tools and resources we’ve used to design, develop, implement, and iterate upon a bureau-wide, utilization-focused learning agenda called the Lab Evaluation, Research, and Learning (ERL) Plan. A process, as well as a series of products, the ERL Plan was designed to strengthen the Lab’s ability to learn, and continuously improve its programs, operations, and strategy. Initially facilitated by EIA, the Plan is holistically informed by—and serves to further institutionalize—strategic learning and adaptive management through collaborative efforts across the Lab.

Through this Playbook, we hope to inspire and equip others to bring learning and evidence utilization to the fore in their own work by providing practical examples of how we applied innovative thinking from the disciplines of human- and user-centered design, organizational development, and adult learning to operationalize the Lab ERL Plan. This document also serves as a compilation of relevant tools, resources, and insights developed by others at USAID whose knowledge and experience with learning agendas directly benefited the Lab’s learning work.

This document benefits from feedback. If you see a typo, notice a missing resource, have a question, or would like more information, please reach out to us at LabEIA@USAID.gov
What is a utilization-focused approach to learning? Isn’t this just Collaborating, Learning, and Adaptation (CLA)?

Yes …

Collaborating, Learning, and Adapting (CLA), are a set of practices that, when systematically planned and adequately resourced for, help us improve the effectiveness of our work. Learning Agendas—a set of broad questions directly related to the work that USAID conducts, which when answered, enable us to work more effectively and efficiently—are one of the ways that operating units across the Agency practice strategic collaboration, continuous learning, and adaptive management. This Playbook capitalizes on the existing tips, guides, tools, resources, and examples of the general ‘what’ and ‘why’—of learning agendas; including the CLA Toolkit—while expanding on the ‘how’ of designing and implementing learning agenda processes and products to better enable use of learning and evidence in decision making.

…and…

The Playbook and utilization-focused learning approach were developed based on a common challenge identified during a cross-bureau CLA learning agenda effort: while learning agendas are meant to facilitate the knowledge cycle, in which knowledge is 1) generated, 2) synthesized and translated, 3) disseminated, and 4) used to adapt our strategies, programs, and practices—often, learning teams are asked to focus our resources and efforts at the “beginning” of the cycle; investing in evidence generation and synthesis — and then running out of steam when it came to translation, dissemination, and eventual use. We learned that sometimes, by the time the evidence from our respective efforts had been generated and synthesized (and even disseminated), the opportunity to use it had been missed.

★ CLA Toolkit - Learning Agendas
★ USAID/Washington and Beyond: Learning Agenda Landscape Analysis
★ Learning Agendas: The Five Most Important Things You Need to Know
To attempt to bridge this gap, in developing the Lab ERL Plan, we asked ourselves: “How might we design and implement a learning agenda that completes the full knowledge cycle, improving the Lab’s ability to utilize evidence in decision-making?” The initial answers to this question—based on successes, failures, and many iterations on the Lab ERL Plan process and products—are what we have documented here as a utilization-focused approach. While we are continuously learning and refining this approach, we hope that by offering recommended steps in a ‘play-by-play’ guide format, we will help others know how to get started or otherwise adapt their learning efforts to enable the full knowledge cycle.

How should the Playbook be used?

The Playbook is designed for USAID staff who are thinking about, or actively involved in, planning or implementing a learning agenda effort. It is also for USAID staff who support learning and adaptive management, and who are interested in exploring intentional and systematic learning methods. The guidance is particularly geared towards activity managers, team leads, and champions of collaborating, learning, and adapting (CLA) approaches.

The Playbook breaks down approaches to integrating a utilization focus throughout a learning agenda into four phases (Define, Discover, Design, and Deliver), each comprised of action steps. While incorporating a utilization focus beginning at the earliest phases of learning agenda development is ideal, readers can engage with the phases or action steps most relevant to their work in the order most useful to them.

- **Cracking the Evidence Conundrum:**
  - Four Ideas to Get People to Use Evidence

- **Rapid literature review on evidence-driven decision-making**

- **Creating Learning Agendas that will be USED**

- **Straight off the Shelf: Unpacking your Utilization-Focused Learning Agenda**
What does the process of utilization-focused learning look like?

**DISCOVER**
Build a deeper understanding of the people, contexts, and problems the learning effort will be designed to engage.

**DEFINE**
Create a common understanding amongst the start-up team of the immediate opportunities and limitations.

**DESIGN**
Create parameters for the learning agenda that make implementation responsive to the people, contexts, and problems you will engage.

**DELIVER**
Continuously improve the learning agenda processes and products to achieve uptake amongst key decision-makers.
What’s Inside

DEFINE

Every learning agenda effort starts with an idea, task, or mandate.

1.1 Document Initial Learning Agenda Requirements & Resources
1.2 Form and Convene the Start-Up Learning Agenda Team
1.3 Assess Feasibility of, and Secure Buy-in for, a Utilization-Focused Approach
1.4 Establish a theory of change for the learning agenda effort

DEFINE Lessons from the Lab

DISCOVER

Identifying and exploring the system within which the learning effort is sited is critical to a utilization-focused approach.

2.1 Plan for the Discover and Design phases
2.2 Conduct research to identify key stakeholders and their needs
2.3 Identify potential learning questions or areas of inquiry
2.4 Synthesize to arrive at user insights and learning opportunities

DISCOVER Lessons from the Lab

DESIGN

A utilization focus should be mainstreamed throughout the design for learning agenda processes and products.

3.1 Build a prototype for the learning process
3.2 Formally Launch the Learning Agenda

DESIGN Lessons from the Lab

DELIVER

Testing the process and products, and adapting based on measurement and feedback, are essential to this approach.

4.1 Monitoring, evaluation, learning, and adaption
4.2 Produce useful learning outputs
4.3 Disseminate evidence and learning
4.4 Facilitate learning uptake

DELIVER Lessons from the Lab
Every learning agenda effort starts with an idea, task, or mandate. In this phase, you will document the initial requirements and resources for the learning agenda; form a startup team; assess the feasibility of, and secure buy-in for, a utilization-focused approach; and establish a draft theory of change for your learning agenda effort. The goal of this phase is to create a common understanding amongst the start-up team of the immediate opportunities and limitations facing the learning agenda.
LEARNING AGENDA CHARTER

A project charter can help to establish a clear mandate for the learning agenda, and identify requirements and available resources at the outset of the design process.

What

The project charter is a short document (or series of documents) that outlines preliminary learning agenda terms of reference (background, purpose, objectives, success metrics), and details initial staffing resources, roles, and responsibilities; including any definitions or delegations of authority. The charter identifies baseline thinking regarding key stakeholders, and captures expectations regarding how - and to what extent - different stakeholders will participate in the design and implementation of the learning agenda. It should be updated throughout design and implementation as thinking evolves.

Why

The purpose of the charter is to create a shared understanding of the project amongst its participants, and act as an authorizing document for the project team to move forward with subsequent phases.

Document Learning Agenda Requirements & Resources

Create a common understanding of learning agenda goals, and document boundaries and expectations at the outset of the effort. Initial documentation can be used to gain authorization for the agenda, identify and defend necessary budget and staff resources, and begin planning for the design in an efficient manner.

> Draft a learning agenda charter
> Begin a process diary/ change log

1.1 Document Learning Agenda Requirements & Resources
1.2 Form and Convene the Start-Up Learning Agenda Team
1.3 Assess Feasibility of, and Secure Buy-in for, a Utilization-Focus
1.4 Establish a theory of change for the learning agenda effort
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LEARNING AGENDA CHARTER

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How

1. Collect existing documentation of requirements or expectations regarding the design and implementation of the learning agenda - this may include presentations, emails, or other documents outlining the intention to develop a learning agenda; as well as Agency guidance on learning agendas.

2. Meet (or otherwise communicate) with the group or individuals who have mandated the need for a learning agenda (team or operating unit leadership, for example) to gather information relevant to the charter.

3. Utilize these inputs to complete your initial charter document, and solicit feedback on its content as desired or necessary. The document should outline what is known about: learning agenda purpose and vision, goals & objectives, priorities, target audience, success metrics, current and out-year financial resources, available staff resources and skills, expectations regarding roles, such as collaboration/participation.

4. Engage in clearance, sign-off, or other authorizing actions that allow learning agenda development to move forward.
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> **Draft a learning agenda charter**
> **Begin a process diary/change log**

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### LEARNING AGENDA CHARTER

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#### Resources

- Project Charter Template (USAID Internal)
- Project Charter Example - Communities of Practice Guidance
Document Learning Agenda Requirements & Resources

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> Begin a process diary/ change log

PROCESS DIARY/ CHANGE LOG

A process diary or change log is an ongoing management tool for recording learning agenda information and changes over time to help support adaptive management.

What

A process diary or change log chronicles learning agenda events, discussions, and documents throughout design and implementation. It documents the date and reasoning behind key changes or decisions about the learning agenda process or products, and serves as a knowledge management tool and data source for adaptive management.

Why

The purpose of the process diary or change log is to support knowledge management across learning agenda stakeholders, and to act as an adaptive management tool for tracking what changes were made and why.

How

1. Choose whether a process diary or pivot/change log (or both) are most useful for your effort. A process diary is a comprehensive document with a running log of events, agendas, notes, and links to relevant documents. A pivot or change log is a table in a document or spreadsheet that creates a central place for documenting progress, decisions, and adaptation. A pivot/change log detailing adaptations is often a top priority. If time and resources allow for a process diary, then this can also be used; but it requires more effort than a pivot log, due to the higher level of detail.
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**PROCESS DIARY/ CHANGE LOG**
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**How (continued)**
2. Establish the selected document. Setting up the process diary or change/pivot log prior to any convenings on the design process will allow you to capture in real-time important learning agenda related events, discussions and decisions.

Pivot/Change Log. Columns/ sections for a change log might include the following for each iteration of an evolving document (e.g. the learning agenda charter):
- Version number (with link to document)
- Date
- What Stayed Consistent / General Notes
- Significant Changes - Include why changes were made
- Additional Changes - Include why changes were made

b. Process Diary. Sections for a process diary might include the following:
- Version number (with link to document)
- Date
- Event, such as meeting or activity
- Link to relevant or related documents
- Notes / Reflections
### Document Learning Agenda Requirements & Resources

Create a common understanding of learning agenda goals, and document boundaries and expectations at the outset of the effort. Initial documentation can be used to gain authorization for the agenda, identify and defend necessary budget and staff resources, and begin planning for the design in an efficient manner.

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**How (continued)**

3. Add the documents to any meeting agenda and designate which team member(s) will be responsible for providing updates.

4. Incorporate and integrate updating, reviewing, and using these documents into ongoing meetings or critical pause and reflect moments.

### Resources

- **Change/Pivot Log Template**
- **Process Diary Template (USAID Internal)**

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**PHASE I | DEFINE**

**ABRIDGED External • 01/2020**
Form and Convene the Start-Up Learning Agenda Team

Stand up the team responsible for planning and leading the strategic planning, user research, and learning agenda design processes

Forming and convening a learning agenda startup team who has the skills - and sufficient availability - to help plan and manage (or conduct) strategic planning and user research (Discovery) and translate insights into utilization-focused processes and products (Design) is essential for early success.

> Identify team members
> Align and inspire the team

IDENTIFY TEAM MEMBERS

Identify the roles, responsibilities and identities of team members who will move forward the planning and management of the Define, Discover, and Design phases.

What

A startup team has the skills and experience necessary to plan and manage the initial phases of developing the learning agenda, and will serve as champions of a utilization-focused approach.

Why

Beyond ensuring sufficient capacity to develop the agenda, it is important to consider the relationships and social capital held by startup team members. Ensuring the needs of the end users and decision makers are well represented is key. For example, including leadership and appropriate technical perspectives on the startup team can help guide identification of key decision-makers, whose work the learning agenda must inform. Adaptive management, creativity, and collaboration are also key skills for this initial team, as they will be responsible for guiding stakeholder research and working together to ensure user equities and interests are represented in the design of the learning agenda.
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How

1. Consider the timeline for planning and implementing the initial learning agenda Discover and Design phases, and determine which capabilities are needed at which times throughout the process. These may include:
   - Technical expertise
   - Methodological skills
   - Adaptive management experience
   - Relationships with key stakeholders

2. Identify and recruit potential staff that represent these capabilities and whose availability matches the necessary timeline.

a. You may have an option to designate or solicit interested staff members to support the learning agenda. Consider individuals’ skills and availability, as well as their ability to represent key end user or decisionmaker constituencies. For example, if the learning agenda will focus on three main technical topics or functional areas, or specific user groups/decisionmakers, these should ideally all be represented by various team members.
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**How (continued)**

b. Also consider the need for skills around adaptive management, collaboration and intentional learning that different staff may be able to bring to the effort. Ensure you have sufficient people and level of effort to complete tasks. If you need to recruit additional people, you may need to articulate these needs formally to leadership and obtain their approval for additional resourcing.

c. If the startup team is missing representatives of key points of view, or lacking critical skills, generate a mitigation plan to address any potential deficiencies.

3. Draft team member roles and responsibilities. These may evolve and emerge over time, but beginning to designate roles and responsibilities on tasks or broader areas can be useful, even at this early stage.

4. Update (and, if needed, re-authorize) the learning agenda charter to include this information. This may require additional meetings with leadership to validate and approve any substantive changes.
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1. Identify team members
2. Align and inspire the team

How (continued)

5. Identify, brief, and maintain relationships with leadership points-of-contact: The team should ensure that you have leadership buy-in. This includes identifying the roles leaders can fill and the opportunities they will have to encourage and support the initiative. A leadership sponsor is often critical because ultimately implementing a learning agenda requires resources and if they are not clued into what is going on or its value, they will not continue to invest. Participation by leadership in the core team can be useful but is not always feasible. Using a regular scheduled meeting to update leadership can be an effective way to achieve this.

6. Outside of leadership, you should identify the individuals who will support and benefit from your learning agenda, as well as the appropriate level of engagement required of them. These can be external and internal ‘champions’ that may have insight and expertise. Consider holding an initial meeting to discuss the learning agenda and assign key responsibilities and arrange a recurring meeting or the next task(s) for developing the learning agenda.
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IDENTIFY TEAM MEMBERS

Identify the roles, responsibilities and identities of team members who will move forward the planning and management of the Define, Discover, and Design phases.

Resources

★★ A Guide to Hiring Adaptive Employees
★★ Example Staffing Roles & Responsibilities (USAID Internal)
Form and Convene the Start-Up Learning Agenda Team

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ALIGN AND INSPIRE THE TEAM

Jump start creative collaboration amongst the design team by aligning on opportunities and expectations.

What

A kick-off workshop can help align the team around a common purpose and vision for the design process; determine initial design challenges; and identify and begin practicing the team and individual mindsets, beliefs, behaviors, and rituals necessary for success.

Why

Codifying 'why', 'what', and 'how' the team will work, and practicing these together, enables cohesion around a common team culture - a critical enabler of organizational success.

How

1. Schedule and plan for the a kick-off workshop: The core team should share a common understanding of the rationale and purpose of the learning agenda. It is therefore critical to gather the core team for a kick off workshop or series of meetings to discuss and agree on the bounds of engagement and participation and identify how much time each person can dedicate to the effort. This includes setting parameters around how to plan the remaining steps of the process and identify who is responsible for each activity and task.
Form and Convene the Start-Up Learning Agenda Team

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ALIGN AND INSPIRE THE TEAM

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How (continued)

2. Send out the relevant invite and agenda to participants. Leadership briefings or meetings may need to be scheduled prior to or following the kick-off workshop. Try to designate or incorporate note-taking during the workshop or meeting to capture the important takeaways. The kick-off agenda should include at least the following items:
   - Background and introductions
   - Team purpose & vision exercises
   - Team culture agreements (mindsets, beliefs, behaviors, rituals)
   - Learning agenda design challenges and opportunities
   - Next steps, with assigned responsible/ accountable.

3. Schedule regular core team meetings: Following this process, it will be critical to have subsequent planning meetings to agree and develop planning documents related to the work plan. Ideally, these include relevant scopes of work, a work plan and communications plan. Scopes of work can be helpful if the learning agenda will need dedicated resources and may facilitate necessary approvals. The frequency and length of meetings should be determined by the amount of work that can be completed within the meetings versus the time available outside of the meeting to complete tasks.
### Form and Convene the Start-Up Learning Agenda Team

Stand up the team responsible for planning and leading the strategic planning, user research, and learning agenda design processes.

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### Align and Inspire the Team

Jump start creative collaboration amongst the design team by aligning on opportunities and expectations.

#### Resources

- Kick off Meeting Agenda Template (USAID Internal)
- Team Agreements
- Team rituals
- Teaming resources
Assess Feasibility of, and Secure Buy-in for, a Utilization-Focus

Understand whether a utilization-focused approach can be mainstreamed throughout the learning agenda process and products, or if a more tactical approach is needed.

A utilization-focused approach to learning agendas often requires a "go slow to go fast" mindset and planning - assessing the feasibility of this approach, and securing buy-in for intensive up-front investment in understanding user needs can prevent misaligned expectations on timelines and outputs.

> Assess or review feasibility and buy-in

ASSESS / REVIEW FEASIBILITY AND BUY-IN

An assessment or review to determine the feasibility and buy-in for a user-focused approach.

What

Determine whether a utilization focus can be mainstreamed throughout learning agenda development and implementation, or if discrete utilization-focused efforts are needed to best align with available resources and leadership expectations.

Why

A user-focused approach requires more time, attention and focus than a traditional approach of developing evidence and dissemination. Ensuring that leadership and users are aware of these implications is critical to understanding how feasible the process along with how much ownership the process will likely have from users. This review or assessment can help determine if this approach is appropriate, identify potential challenges that can be remedied or suggest that an alternative approach may be needed.
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ASSESS / REVIEW FEASIBILITY AND BUY-IN

A assessment or review to determine the feasibility and buy-in for a user-focused approach.

How

1. Brief leadership to understand their receptivity and interest in a user-focused learning agenda. Review the charter, including design team composition and roles and responsibilities, and take note of discussion items and decision points or action items (for example, in your Process Diary).

2. Meet with a small set of users and stakeholders to brief and understand the receptivity and interest to a user-focused learning agenda. Take notes of discussion items and decision points or action items.

3. Review notes and observations made during leadership and user/stakeholder meetings.

4. Discuss any takeaways regarding buy-in and ownership and any feasibility challenges along with potential mitigation approaches. Incorporate these into relevant documents including the workplan.
Assess Feasibility of, and Secure Buy-in for, a Utilization-Focus

Understand whether a utilization-focused approach can be mainstreamed throughout the learning agenda process and products, or if a more tactical approach is needed.

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ASSESS / REVIEW FEASIBILITY AND BUY-IN

A assessment or review to determine the feasibility and buy-in for a user-focused approach.

Resources

★ Feasibility and Buy-in Checklist (USAID Internal)
Establish a theory of change for the learning agenda effort

A theory of change for the learning agenda details how and why the learning process and products will achieve the goals of the overall learning effort; for example, how and why it will lead to evidence-informed decision making.

> Establish theory of change

ESTABLISH THEORY OF CHANGE

A theory of change for the learning agenda details how and why the learning process and products will achieve the goals of the overall learning effort; for example, how and why it will lead to evidence-informed decision making.

What

Documentation of a theory of change can take many forms but is most frequently codified in a short "If... then... so that..." statement or narrative, with an accompanying graphic that illustrates ultimate learning objectives, and the assumed preconditions (inputs, outputs, outcomes) for success.

Why

Collectively developing a theory of change can help to create common understandings amongst the startup team of initial assumptions regarding what knowledge will be produced by the learning agenda, and how it is intended to be used (and by whom).
Establish a theory of change for the learning agenda effort

A theory of change for the learning agenda details how and why the learning process and products will achieve the goals of the overall learning effort; for example, how and why it will lead to evidence-informed decision making.

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**ESTABLISH THEORY OF CHANGE**

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**How**

1. Start by reviewing the contents of the Charter to determine any existing assumptions about components of the theory of change.
   - What are the intended inputs, outputs, outcomes, and impacts of the learning agenda?
   - What types of decisions (programmatic, operational, strategic) is the learning agenda intended to inform?
   - At what level will the evidence be used, and by whom (activity, project, strategy/ by individual staff, teams, or OU-wide)?
   - What types of outputs are expected? Who and how will evidence be disseminated? How and why might evidence be used?
   - Which internal and external stakeholder groups are key to your efforts?

2. Draft a narrative and simple graphic representing the theory of change
   - Consider how the elements discussed in 1 fit together –
   - What else might be needed in order to reach the learning objectives?
   - How must key stakeholders (evidence generators, synthesizers, disseminators, influencers, and users/ decision makers) interact to realize the theory of change?
Establish a theory of change for the learning agenda effort

A theory of change for the learning agenda details how and why the learning process and products will achieve the goals of the overall learning effort; for example, how and why it will lead to evidence-informed decision making.

3. Communicate, validate, and clarify the theory of change
   - Plan time during the Discover phase to share the theory of change with key stakeholders, and collect feedback for incorporation into the design
   - Plan key moments to review the theory of change, and revise the narrative and graphic as more is learned about whether, and how, the theory holds up

**ESTABLISH THEORY OF CHANGE**

Documentation of a theory of change can take many forms but is most frequently codified in a short "If... then... so that..." statement or narrative, with an accompanying graphic that illustrates ultimate learning objectives, and the assumed preconditions (inputs, outputs, outcomes) for success.

How (continued)

**Resources**

- Theory of Change: Facilitator’s Guide
- Theory of Change Introduction
- Theory of Change Checklist
- Theory of Change in Project Design Training (available to USAID staff through USAID University)


**DEFINE Lessons from the Lab**

**Build energy and momentum and walk the walk**

In the initial stages of the learning agenda it is important to ensure that you align with current priorities and can begin to articulate the potential benefits of the process. Building a strong and diverse core team to serve as these advocates and help move the process along is critical even at this early stage. They can also support building interest and awareness of the initiative. In addition, walking the walk can provide a powerful signal to others, including users, that the learning agenda effort is worthy of support and attention. For example, begin documenting and learning from the process from the beginning. Ensuring good knowledge management can support clarity of purpose and intentionality of adaptive management, a key hallmark of user focused learning agendas.

**Clarity, clarity, clarity**

Articulating, documenting, and sharing the initial purpose, focus and intended users of the learning agenda is critical to ensuring that the core staff, leadership and users are familiar with and understand the way the learning agenda can support their work. Obtaining clarity is not always easy and often writing down the goals and roles of involved staff is critical to building a shared understanding of the purpose of the learning agenda and how individual contributions can support its overall goal.
Identifying and exploring the system within which the learning effort is sited is critical to a utilization-focused approach. In this phase, you will conduct research identifying key stakeholders; begin to engage system actors to identify potential areas of inquiry; and synthesize all of these elements to arrive at user insights and learning opportunities that drive forward the design of the learning agenda process and products. The goal of this phase is to build a deeper understanding of the people, contexts, and problems the learning effort will be designed to engage.
Plan for the Discover and Design phases

Determine the initial timeline and scope for the Discover and Design phases, and plan resources against them.

The Discovery phase is critical to a utilization-focused approach, but is often the most rushed and under-resourced. Planning ensures adequate time and appropriate staff resources are available to complete exercises including establishing a learning agenda theory of change, conducting user research, and synthesizing user insights to arrive at meaningful learning questions or areas of inquiry - and then translating these to a utilization-focused learning approach in the Design phase.

**Workplan**

A workplan for the Discover phase ensures that the scope and timeline are agreed, and that responsibility and accountability are assigned for relevant tasks, milestones and deadlines.

**What**

The work in the Discover phase provides the basis for designing a user- and utilization-focused learning agenda process and products. A workplan helps to ensure that the team plans adequate time and allocates appropriate resources for gathering and synthesizing user insights.

**Why**

A workplan is an important tool to assign learning agenda tasks, manage the workflow and track the progress of various components against milestones or deadlines. Developing or updating an existing workplan prior to the start of each phase helps provide structure and define accountability for activities and results, and prompts the team to consider whether adjustments to the scope or scale of the effort are necessary.
Plan for the Discover and Design phases

Determine the initial timeline and scope for the Discover and Design phases, and plan resources against them.

The Discovery phase is critical to a utilization-focused approach, but is often the most rushed and under-resourced. Planning ensures adequate time and appropriate staff resources are available to complete exercises including establishing a learning agenda theory of change, conducting user research, and synthesizing user insights to arrive at meaningful learning questions or areas of inquiry - and then translating these to a utilization-focused learning approach in the Design phase.

> Workplan

WORKPLAN

A workplan for the Discover phase ensures that the scope and timeline are agreed, and that responsibility and accountability are assigned for relevant tasks, milestones and deadlines.

How

1. Discuss the structure, location and drafting of the workplan document during a team meeting. Building in time to talk through the logistics of the workplan will save time and set a precedent for ensuring that all team members share the same expectations. You should also discuss how the drafting process should be conducted either with one or a set of designated drafters.

2. Draft the work plan: The work plan document should include the objectives of the learning agenda and key steps including dates and milestones for particular stakeholder engagement or other activities for the next phase. The work plan document should be seen as an adaptive tool and include or link to a change log where changes can be updated as the learning agenda occurs.
Plan for the Discover and Design phases

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WORKPLAN

A workplan for the Discover phase ensures that the scope and timeline are agreed, and that responsibility and accountability are assigned for relevant tasks, milestones and deadlines.

How (continued)

3. Share the draft with relevant team members, leadership and others as needed to obtain comments and feedback.

4. Review and finalize the workplan at a team meeting. Incorporating the review of the workplan in upcoming meetings by adding to the meeting agenda can encourage the document to remain updated and keep the team accountable to milestones and deadlines.

> Workplan
Plan for the Discover and Design phases

Determine the initial timeline and scope for the Discover and Design phases, and plan resources against them.

The Discovery phase is critical to a utilization-focused approach, but is often the most rushed and under-resourced. Planning ensures adequate time and appropriate staff resources are available to complete exercises including establishing a learning agenda theory of change, conducting user research, and synthesizing user insights to arrive at meaningful learning questions or areas of inquiry - and then translating these to a utilization-focused learning approach in the Design phase.

WORKPLAN

A workplan for the Discover phase ensures that the scope and timeline are agreed, and that responsibility and accountability are assigned for relevant tasks, milestones and deadlines.

Resources

- Work Plan Spreadsheet Template (USAID Internal)
Conduct research to identify key stakeholders

Identifying and understanding the needs and motivations of the evidence generators, disseminators, knowledge brokers, and users/decision-makers for your learning agenda is the key to a utilization-focused approach.

> Stakeholder Analysis
> User research basics

STAKEHOLDER ANALYSIS

Stakeholder analysis helps to systematically identify and assess the needs and interests of the individuals, groups, or institutions who will be involved in, or affected by, the learning agenda.

What

Through stakeholder analysis methods, the learning agenda team will work to create a shared understanding of who its key stakeholders are and how these stakeholders are expected to interact with, or be influenced by, the learning agenda. This is one of the first opportunities to detail expectations or assumptions regarding who will fulfill the roles of evidence generators, synthesizers, disseminators, uptake facilitators, and end users/decision makers.

Why

Stakeholder analysis provides a foundation for strategically engaging different user groups. Following initial analysis, more robust user research can be targeted and planned, and the learning agenda theory of change amended or revised to reflect these findings.
Conduct research to identify key stakeholders

Identifying and understanding the needs and motivations of the evidence generators, disseminators, knowledge brokers, and users/decision-makers for your learning agenda is the key to a utilization-focused approach.

STAKEHOLDER ANALYSIS

Stakeholder analysis helps to systematically identify and assess the needs and interests of the individuals, groups, or institutions who will be involved in, or affected by, the learning agenda.

How

1. Refer to the theory of change for your learning agenda to identify the stakeholders (individuals, groups, institutions) you believe will be impacted by - or may influence - each part.

2. For each part of the theory of change, list relevant stakeholders who could affect these processes or results. Record hypotheses for each stakeholder regarding what role they will need to play to achieve the related result or successfully implement the process; their potential influence on the learning agenda; and their attitudes toward the learning agenda effort. Recording this data in a spreadsheet or database can allow more rapid analysis once findings are input.
Conduct research to identify key stakeholders
Identifying and understanding the needs and motivations of the evidence generators, disseminators, knowledge brokers, and users/decision-makers for your learning agenda is the key to a utilization-focused approach.

> Stakeholder Analysis
> User research basics

**STAKEHOLDER ANALYSIS**

Stakeholder analysis helps to systematically identify and assess the needs and interests of the individuals, groups, or institutions who will be involved in, or affected by, the learning agenda.

**How (continued)**

3. Validate the hypotheses through stakeholder interviews, questionnaires, or other methods. Seek also to further identify stakeholder concerns, motivations, and abilities to act as evidence generators, disseminators, or users. Provide early opportunities for stakeholders to raise questions or areas of inquiry for the learning agenda to address.

4. Use the results of the analysis to inform your strategy for further stakeholder engagement, a communications plan, and the design and implementation of the learning agenda.

5. Review and update the analysis regularly. The process of stakeholder analysis should be ongoing and iterative and should be reviewed after each step. In particular, ensure that the learning questions have been developed with the users’ and decision makers’ needs in mind.
Conduct research to identify key stakeholders

Identifying and understanding the needs and motivations of the evidence generators, disseminators, knowledge brokers, and users/decision-makers for your learning agenda is the key to a utilization-focused approach.

> Stakeholder Analysis
> User research basics

## STAKEHOLDER ANALYSIS

Stakeholder analysis helps to systematically identify and assess the needs and interests of the individuals, groups, or institutions who will be involved in, or affected by, the learning agenda.

### Resources

- ★ Stakeholder Analysis Guide (USAID Internal)
- ★ Stakeholder Analysis Matrix (USAID Internal)
- ★ [Net-Mapping](#)
- ★ [Collaboration mapping exercise](#)
- ★ [Mission Engagement Playbook, p8](#)
Conduct research to identify key stakeholders

User research can help the team discover the learning needs and decision-making processes of learning agenda stakeholders, and uncover insights about the contexts in which the learning agenda will be implemented.

> Stakeholder Analysis
> User research basics

USER RESEARCH BASICS

User research can help the team discover the learning needs and decision-making processes of learning agenda stakeholders, and uncover insights about the contexts in which the learning agenda will be implemented.

What

User research helps the learning agenda team better understand and empathize with its stakeholders’ needs, expectations, and motivations through systematic, exploratory methods. Findings from these efforts are used in the Design Phase to ensure that the learning agenda leverages stakeholder resources and motivations, addresses barriers to action or negative influences, and fills important knowledge gaps.

Why

Acting on user research in the Design Phase ensures the learning agenda is responsive to stakeholder needs and interests; key enablers of evidence use.

How

1. Review potential user research methods. These range from interviews, focus groups and surveys to approaches such as card sorts, journey mapping and personas.
### USER RESEARCH BASICS

User research can help the team discover the learning needs and decision-making processes of learning agenda stakeholders, and uncover insights about the contexts in which the learning agenda will be implemented.

**How (continued)**

2. Determine and plan the appropriate method based on time, resources and available expertise. Different approaches and methods require varying levels of time, money and expertise to design and implement.

3. Conduct relevant user research.

4. Review relevant analysis and synthesize and summarize if multiple methods are used.

5. Review existing learning agenda documentation, including the theory of change and stakeholder analysis, to reflect knowledge.

6. Continue to occasionally review any learning and evidence based on feedback from the implementation of the learning agenda.
Conduct research to identify key stakeholders

User research can help the team discover the learning needs and decision-making processes of learning agenda stakeholders, and uncover insights about the contexts in which the learning agenda will be implemented.

> Stakeholder Analysis

> User research basics

USER RESEARCH BASICS

User research can help the team discover the learning needs and decision-making processes of learning agenda stakeholders, and uncover insights about the contexts in which the learning agenda will be implemented.

Resources

- Facilitation Tips for Stakeholder Consultations (USAID Internal)
- Design Kit: The Human-Centered Design Toolkit
- Design School Thinking Playbook
- Human Centered Design Playbook
Identify potential learning questions or areas of inquiry

Learning questions or areas of inquiry help focus the learning agenda around opportunities to inform key stakeholders’ decisions about programming, operations, and strategies.

Collecting, developing, and prioritizing learning questions is a creative process that, in a utilization-focused approach, is driven by key stakeholder participation and insights. While parameters around the overarching scope for the learning agenda might be determined in advance, or question prioritization influenced by resource constraints or top-down mandates, final selection of questions should be based on alignment with stakeholders’ key decision points or stated evidence needs.

> Learning question formulation

**LEARNING QUESTION FORMULATION**

Identify and validate timely and appropriate learning questions or areas of inquiry.

**What**

During stakeholder analysis and user research, it is important to collect and/or validate potential learning agenda questions or areas of inquiry with stakeholders, in order to inform prioritization and resourcing.

**Why**

Choosing and publishing learning agenda questions or areas of inquiry that are valued by users helps to show that user input was heard and incorporated.

**How**

1. Design the question formulation process. The process should outline the major points of engagement with stakeholders to prioritize learning questions; the work plan should be reviewed and updated accordingly. Practical factors including the availability of staff and the number of questions to be chosen will impact this step. The need for any review and analysis of existing literature or the need to design facilitated processes to develop learning questions will also impact the design of this step.
LEARNING QUESTION FORMULATION

Identify and validate timely and appropriate learning questions or areas of inquiry.

How (continued)

a. Identify existing sources of questions. First the core team should compile a list of potential questions from existing sources. Often there exist questions from evaluations, learning events or reports that can be used as a starting point to identify and cluster areas of interest. Theories of change can be a useful starting point to understand gaps in knowledge or assumptions that are made that can be rewritten as learning questions. In other cases, new knowledge exists but is not well known or internalized by stakeholders. The core team or a wider group of stakeholders can help identify and collate these existing questions. For example, the core team or other delegated individual can review theories of change for knowledge gaps and/or by assessing priority areas or themes for learning. Alternatively, either remote or in-person sessions such as brainstorming, surveys, or ideation workshops could be held with key stakeholders to produce a list of questions.
LEARNING QUESTION FORMULATION

Identify and validate timely and appropriate learning questions or areas of inquiry.

How (continued)

b. Identify new questions and validate existing questions. The next step involves validating existing list of questions but also allowing space to generate new learning questions. This step should also consider identifying knowledge gaps where there questions but a lack of evidence. It can be useful to offer multiple and different opportunities to engage in validation and question development. For example, providing for a remote solution through a Google Document or survey as well as in person facilitated workshops. This allows for the need to accommodate others schedules and provide ample entry points. During the course of these sessions, often learning questions may be rewritten or reframed; often it is best to leave wordsmithing to last and ask users to focus on the area of inquiry rather spending time on the particular question wording; however, sometimes wordsmithing is a necessary evil in order to obtain participation.
Identify potential learning questions or areas of inquiry

Learning questions or areas of inquiry help focus the learning agenda around opportunities to inform key stakeholders’ decisions about programming, operations, and strategies.

Collecting, developing, and prioritizing learning questions is a creative process that, in a utilization-focused approach, is driven by key stakeholder participation and insights. While parameters around the overarching scope for the learning agenda might be determined in advance, or question prioritization influenced by resource constraints or top-down mandates, final selection of questions should be based on alignment with stakeholders’ key decision points or stated evidence needs.

> Learning question formulation

LEARNING QUESTION FORMULATION

Identify and validate timely and appropriate learning questions or areas of inquiry.

How (continued)

2. Aggregate and cluster questions by areas of inquiry. Following these steps, it is helpful to produce a list of initial questions. Since the number of questions can be quite large it can be helpful to categorize and cluster questions by shared topic or theme. This can help to understand if there are any gaps of areas of inquiry as well as which topics are of most interest to users and decision-makers.

3. Review draft learning questions. Reviewing the draft learning questions can be helpful before prioritizing the questions. Revise language to eliminate duplicate and overlapping questions.

4. Document, communicate and learn from the process. Ensure that the formulation process is documented including any question lists, literature, and related notes used during the process are stored in the appropriate folder. Following this step, it is important to communicate updates to end users and decision makers through an email or website update. Consider conducting an After Action Review to ensure that the learning agenda process remains adaptive and focused on the needs of end users and decision makers.
**Identify potential learning questions or areas of inquiry**

Learning questions or areas of inquiry help focus the learning agenda around opportunities to inform key stakeholders' decisions about programming, operations, and strategies.

Collecting, developing, and prioritizing learning questions is a creative process that, in a utilization-focused approach, is driven by key stakeholder participation and insights. While parameters around the overarching scope for the learning agenda might be determined in advance, or question prioritization influenced by resource constraints or top-down mandates, final selection of questions should be based on alignment with stakeholders' key decision points or stated evidence needs.

> **Learning question formulation**

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**LEARNING QUESTION FORMULATION**

Identify and validate timely and appropriate learning questions or areas of inquiry.

**Resources**

- Learning Question Checklist
- DRG Learning Question Guide (USAID Internal)
- CLA Toolkit section on Engaging Stakeholders for methods and approaches to engage with stakeholders
- See pages 11-12 in the Urban Institute Engaging Stakeholders in Learning Agenda Development A Playbook for Federal Agencies
- See sections on learning agenda processes in the USAID Learning Agenda Landscape Analysis
## Synthesize to arrive at user insights and learning opportunities

Make sense of data collected throughout the Discover phase and come to a common understanding of key stakeholders, priority learning questions, and critical process and product insights for the Design phase.

The Discover phase generates a wealth of data; likely collected by multiple members of the team. In this closing step, the team comes together to share what has been learned with one another, identify themes and surface assumptions, and ultimately, come to a common interpretation of the context within which the learning agenda will operate.

### > Prioritize learning questions

Prioritize and finalize the list of learning questions with input from end users and decision makers, including leadership.

### What

Engaging stakeholders in the prioritization and finalization of the learning questions helps ensure the learning agenda remains focused on utilization.

### Why

The purpose of prioritizing questions is to efficiently match resources with learning needs, focus on the most critical knowledge gaps and evidence needs, ensure broader alignment and connection with other important priorities, and engage relevant stakeholders to feel ownership over the learning agenda process.
PRIORITIZE LEARNING QUESTIONS

Prioritize and finalize the list of learning questions with input from end users and decision makers, including leadership.

How

1. Design a process to prioritize learning questions: Building on the formulation process, the next step is to decide and conduct a process to prioritize the collated learning questions. Clustering of questions and their subsequent review may lead to an adequate number of questions to make a final decision. In other cases, additional steps may be needed. Update the workplan to outline the major points of engagement with stakeholders to prioritize learning questions. Practical factors including the availability of staff and the number of questions to be chosen will impact this step.

2. Prioritize questions: Focus on prioritizing the most critical questions in your learning agenda. In order to facilitate this process, develop a set of criteria to guide your decision-making. This will provide a more objective lens through which you can assess your potential learning questions across the qualities your team deems most important. Example criteria include:

- Is the question important to key stakeholders?
- Is the question aligned with high-level priorities (e.g. USAID Policy Framework, Strategies, Presidential Initiatives)?
- Does the question address a current knowledge gap?
- Will findings related to the question have the potential to inform a specific decision?
- Can the question be addressed using available resources (budget, staff) on an appropriate timeline?

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>Prioritize learning questions

PRIORITIZE LEARNING QUESTIONS

Prioritize and finalize the list of learning questions with input from end users and decision makers, including leadership.

How (continued)

3. Finalize learning agenda questions: The final step is to finalize the list of questions. This may involve a formal memo to leadership to gain their approval, or be a decision of the core team. Often the list of questions will outstrip the resources and time to address them adequately, and so developing action plans—see below step—can be helpful to understand the level of effort and time needed to address the questions satisfactorily. Once the list is finalized, it should be broadly disseminated.

4. Document, communicate and learn from the process: Ensure that the formulation process is documented including any question lists, literature and related notes used during the process are stored in the appropriate folder. Following this step, it is important to communicate updates to end users and decision makers through an email or website update. You may also want to conduct an After Action Review to ensure that the learning agenda remains adaptive and focused on the needs of end users and decision makers.
Synthesize to arrive at user insights and learning opportunities

Make sense of data collected throughout the Discover phase and come to a common understanding of key stakeholders, priority learning questions, and critical process and product insights for the Design phase.

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> Prioritize learning questions

**PRIORITIZE LEARNING QUESTIONS**

Prioritize and finalize the list of learning questions with input from end users and decision makers, including leadership.

**Resources**

- ★ Question Alignment Grid (USAID Internal)
- ★ Learning Use Case Canvas (USAID Internal)
- ★ Criteria Application Tracker (USAID Internal)
DISCOVER Lessons from the Lab

Seek first to understand and engage your users

Evidence use begins with empathy. Understanding and integrating user insights into relevant, timely and actionable learning questions and strategically involving stakeholders throughout the design and implementation processes enables utilization. It is important the people whose behavior you are trying to change (the USERS of your learning agenda) have bought into the process and the content from the beginning. Otherwise, you will likely face more challenges once you have produced findings for these stakeholders to use. Identify users and champions (especially executive sponsors) early via stakeholder mapping and engagement and get their input - or better yet, their ownership - of the learning results and adaptations.

Only include in your learning agenda those questions that you will actually USE to change your decisions and/or practices

There are a lot of things out there that would be “nice to know.” We have a plethora of academic partners and other development actors who are well-placed to help fill these gaps. Our value proposition in this space is toward maximum utility or “need to know” information. We should answer questions that have a direct implication for making different decisions or engaging in different practices.
PHASE 3
Design

By drawing on the user insights and learning opportunities identified in the Discover phase, a utilization focus can be mainstreamed throughout the initial design for learning agenda processes and products. In this phase, you will establish a full operating structure and management approach for the learning effort; build a prototype for the learning process to address the full knowledge cycle - from generation, to synthesis, dissemination, uptake facilitation, and use; formally launch the learning agenda; and create implementation plans for each component, including expected outputs and engagements. The goal of this phase is to create parameters for the learning agenda that makes implementation responsive to the people, continuedexts, and problems you will engage.
3.1 Build a prototype for the learning process

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

In a utilization-focused approach, the process used to deliver on the learning agenda is as important as the content it creates. Certain elements in this process are critical: actively involving leadership and staff in generating and analyzing evidence; embedding these processes within or alongside existing organizational practices; disseminating evidence via customized, accessible products with tailored messaging that avoids jargon; all at the appropriate times to inform decision making. The initial prototype will be the basis from which to iterate and adapt the learning agenda process and products based on feedback. Clarity on operating structures, an efficient management approach, and tailored stakeholder engagement strategies are further enablers of learning agenda success.

> Question action plans
  > Implementation Workplan
  > Engagement & communication plan

3.2 Formally Launch the Learning Agenda

QUESTION ACTION PLANS

Select, plan and implement relevant learning activities to address questions.

What

Learning activities include a wide variety of evidence generation, synthesis, and dissemination efforts; as well as facilitating uptake of this evidence amongst key stakeholders. To be utilization-focused, activities should be designed with learning agenda stakeholders, and adapt as needed, to remain timely and relevant to decision maker needs.

Why

It isn't always necessary to produce new evidence as part of a learning agenda - appropriately planned, resourced, and managed learning activities creatively address user-identified knowledge gaps, and package evidence and practice in ways that are useful and useable by decision makers.
QUESTION ACTION PLANS

Select, plan and implement relevant learning activities to address questions.

How

1. At this point, additional time and resources may be needed to ensure a successful learning agenda. Action plans may be produced by the core team or by designated or volunteer ‘question steward’. A question steward is an interested individual who has the time, requisite skills and knowledge to contribute to managing the action plan for a particular question.

2. Identify the most appropriate learning activity for each priority question: The selection of the learning activities should be based on decision maker needs and preferences, as well as the level of effort and time needed.

> Question action plans
> Implementation Workplan
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**3.2 Formally Launch the Learning Agenda**

**QUESTION ACTION PLANS**

Select, plan and implement relevant learning activities to address questions.

**How (continued)**

Illustrative learning activities include:

- Conducting mandatory and other appropriate analyses, including gender, environmental, climate risk, as well as political economy, cost-benefit, and conflict;

- Conducting performance or impact evaluations;

- Reviewing performance, context, and complementary monitoring data;

- Distilling and applying insights from literature reviews or syntheses of existing research;

- Generating and capturing experiential knowledge through facilitated dialogues and other participatory methods;

- Commissioning original research from academic or implementing partners in areas where there is insufficient knowledge; and,

- Holding deliberate Pause and Reflect opportunities, such as After Action Reviews, mid-course stock takings, peer assists, and learning networks.
QUESTION ACTION PLANS

Select, plan and implement relevant learning activities to address questions.

How (continued)

3. Develop action plans to address each learning question: Individual or combined action plans for each of the learning questions should be developed. The plans should spell out the learning activities you will conduct, including the methods you will employ, your schedule for collecting and analyzing data, and who will play a role in contributing to each question. The plan should also indicate the learning products you anticipate producing as deliverables.

4. Update your workplan to incorporate or link to these action plans. Revisit the operating structure and adapt if needed.
Build a prototype for the learning process

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

In a utilization-focused approach, the process used to deliver on the learning agenda is as important as the content it creates. Certain elements in this process are critical: actively involving leadership and staff in generating and analyzing evidence; embedding these processes within or alongside existing organizational practices; disseminating evidence via customized, accessible products with tailored messaging that avoids jargon; all at the appropriate times to inform decision making. The initial prototype will be the basis from which to iterate and adapt the learning agenda process and products based on feedback. Clarity on operating structures, an efficient management approach, and tailored stakeholder engagement strategies are further enablers of learning agenda success.

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> Implementation Workplan
> Engagement & communication plan

QUESTION ACTION PLANS

Select, plan and implement relevant learning activities to address questions.

How (continued)

5. Actively manage and coordinate ongoing events, activities and products: As implementation proceeds, it will require active management by the core team (and question stewards, if used). Active management entails regular coordination meetings - weekly or bi-weekly - to understand progress, potential overlaps of activities and synergies in learning activities, events and products. The core team should consider conducting After Action Reviews (AAR) following major milestones or events to ensure that the learning agenda remains adaptive and focused on the needs of end users and decision makers.

Resources

⭐ Question Action Plan Template (USAID Internal)
Build a prototype for the learning process

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What

The overarching learning agenda plan structures coordination across individual question action plans; sequencing any cross-question synthesis, dissemination, or evidence uptake facilitation activities. A management approach and workplan provides details on the tasks, deadlines, milestones, lines of management and accountability to address the learning agenda questions.

Why

The learning agenda should be more than the sum of the outputs produced across its component question action plans. Where strategically indicated, events or activities that bring stakeholders together in ways that cross-cut or are otherwise not linked to specific learning questions can help further dissemination and uptake in ways that reduce participation burden on key stakeholders.
IMPLEMENTATION WORKPLAN

Detail the overall learning agenda process, including any cross-cutting activities and events; the operating structure and management approach for the effort; and the sequencing and workflow for the implementation period.

How

1. Designate an individual or set of individuals on the team to develop the overarching learning process and document the implementation work plan. Review stakeholder analysis, user research, question action plans and other documentation to understand potential overlaps and synergies between questions, and to identify any additional events or activities that are needed to reach the objectives of the learning agenda.

2. Draft the implementation work plan: The workplan should include key steps including dates and milestones for particular stakeholder engagement or other activities along with responsible parties and any needed resources. The workplan should include a management/operating structure section that addresses roles, responsibilities and any sub-teams to implement the tasks and activities. The work plan document should be seen as an adaptive tool and include or link to a change/pivot log where changes can be updated as the learning agenda occurs. A meeting or set of meetings may be needed to ascertain the most effective and workable operating structure within the constraints of time and human resource availability.
**3.1 Build a prototype for the learning process**

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

In a utilization-focused approach, the process used to deliver on the learning agenda is as important as the content it creates. Certain elements in this process are critical: actively involving leadership and staff in generating and analyzing evidence; embedding these processes within or alongside existing organizational practices; disseminating evidence via customized, accessible products with tailored messaging that avoids jargon; all at the appropriate times to inform decision making. The initial prototype will be the basis from which to iterate and adapt the learning agenda process and products based on feedback. Clarity on operating structures, an efficient management approach, and tailored stakeholder engagement strategies are further enablers of learning agenda success.

> Question action plans
> Implementation Workplan
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**IMPLEMENTATION WORKPLAN**

Detail the overall learning agenda process, including any cross-cutting activities and events; the operating structure and management approach for the effort; and the sequencing and workflow for the implementation period.

**How (continued)**

3. Share the draft structure with relevant team members, leadership and others as needed to obtain comments and feedback. Seek feedback on the feasibility of the proposed process and any suggested mitigation strategies for potential challenges.

4. Review and finalize the workplan at a team meeting. Incorporating the review of the workplan in upcoming meetings by adding it to the meeting agenda can encourage the team to keep the document updated and hold the team accountable to milestones and deadlines. It can be useful to designate responsibility for keeping the workplan up-to-date to a specific individual.
Build a prototype for the learning process

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

In a utilization-focused approach, the process used to deliver on the learning agenda is as important as the content it creates. Certain elements in this process are critical: actively involving leadership and staff in generating and analyzing evidence; embedding these processes within or alongside existing organizational practices; disseminating evidence via customized, accessible products with tailored messaging that avoids jargon; all at the appropriate times to inform decision making. The initial prototype will be the basis from which to iterate and adapt the learning agenda process and products based on feedback. Clarity on operating structures, an efficient management approach, and tailored stakeholder engagement strategies are further enablers of learning agenda success.

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IMPLEMENTATION WORKPLAN

Detail the overall learning agenda process, including any cross-cutting activities and events; the operating structure and management approach for the effort; and the sequencing and workflow for the implementation period.

Resources

- ★ Work Plan Document Template (USAID Internal)
- ★ Work Plan Spreadsheet Template (USAID Internal)
- ★ Scope of Work Template (USAID Internal)
- ★ RACI Template (USAID Internal)
Build a prototype for the learning process

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

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> Question action plans
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ENGAGEMENT & COMMUNICATION PLAN

A stakeholder engagement plan will enable the learning agenda to effectively and efficiently inform and involve relevant stakeholders during the learning agenda process.

What

A stakeholder engagement strategy provides an overall approach and specific ways to effectively and efficiently involve and inform learning agenda stakeholders.

Why

A tailored and thoughtful engagement strategy can allow you to streamline communications, identify and target messages to users, effectively and efficiently inform and involve users and improve the level of ownership and use of the learning agenda.

How

1. Review existing documents related to stakeholder analysis and any user research conducted.

2. Draft the stakeholder engagement plan: Develop the engagement strategy for the learning agenda. This will ensure you have identified key content and channels for the end users and decision makers. An engagement plan should include:

   - Identify the key audiences
   - Identify key messages
   - Identify key modalities and channels.
3.1  **Build a prototype for the learning process**

Utilize insights from the Discover phase to design an initial prototype for the process for engaging stakeholders to address the learning questions.

In a utilization-focused approach, the process used to deliver on the learning agenda is as important as the content it creates. Certain elements in this process are critical: actively involving leadership and staff in generating and analyzing evidence; embedding these processes within or alongside existing organizational practices; disseminating evidence via customized, accessible products with tailored messaging that avoids jargon; all at the appropriate times to inform decision making. The initial prototype will be the basis from which to iterate and adapt the learning agenda process and products based on feedback. Clarity on operating structures, an efficient management approach, and tailored stakeholder engagement strategies are further enablers of learning agenda success.

> Question action plans
> Implementation Workplan
> **Engagement & communication plan**

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**ENGAGEMENT & COMMUNICATION PLAN**

A stakeholder engagement plan will enable the learning agenda to effectively and efficiently inform and involve relevant stakeholders during the learning agenda process.

**How (continued)**

3. Regularly review the stakeholder plan: Like the work plan, this document should be reviewed periodically and updated as needed. Reviewing the stakeholder analysis from the above step and draft the stakeholder engagement plan to identify key messages and the communication channels.

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**Resources**

- Engagement Plan Template (USAID Internal)
- [DRG Center Learning Agenda Brochure](https://example.com) - this is an example of a learning agenda communications product for the DRG Center's learning agenda
Formally Launch the Learning Agenda

Launch the learning agenda process and any introductory products by sharing the background and implementation plans with internal and external stakeholders, including end users and decision makers, through publications and kick-off events.

> Learning Agenda Kick-off

**LEARNING AGENDA KICK-OFF**

Formally kicking-off the learning agenda informs users and sets expectations for the process.

**What**

A kick-off for the learning agenda provides information on the process and expected products to wider audiences.

**Why**

Kicking-off the learning agenda in an intentional way can help raise awareness among key influencers, set the tone for participation in/ contributions to the learning agenda, and provide an opportunity for staff to have questions answered about the design process to date and upcoming implementation activities. This can be an important moment to make new connections with stakeholders that may have initially been overlooked, or to surface previously-unknown evidence sources.

**How**

1. Identify the key goal(s) of the launch: For example, sharing information on the current work plan, obtaining feedback on the steps in the process, or informing stakeholders about how they are expected to interact and engage in the learning agenda. It is important to ensure that stakeholders understand the process and their role including what entry points they may have.
Formally Launch the Learning Agenda

Launch the learning agenda process and any introductory products by sharing the background and implementation plans with internal and external stakeholders, including end users and decision makers, through publications and kick-off events.

> Learning Agenda Kick-off

LEARNING AGENDA KICK-OFF

Formally kicking-off the learning agenda informs users and sets expectations for the process.

How (continued)

2. Identify the best modality, plan, and hold the launch session(s): In line with the goals of the launch, the core team should identify the best choice of a session or sessions. For example, an all-staff meeting or session or individual team level meetings are potential modalities. This decision is likely also influenced by the level of resources and time available. Following this, the core team should plan the launch event/s including considering the need for skilled facilitation to ensure relevant stakeholders can participate in the process. The launch event/s can then be scheduled and held.

3. Document, communicate and learn from the launch: Ensure that the launch is documented including any agendas, notes or presentations used during the session. Following the launch, it is important to communicate updates to stakeholders through an email, website update, or other relevant channel.

4. Conduct an After-Action Review to capture process learning and ensure that the learning agenda remains adaptive and focused on the needs of end users and decision makers.
Formally Launch the Learning Agenda

Launch the learning agenda process and any introductory products by sharing the background and implementation plans with internal and external stakeholders, including end users and decision makers, through publications and kick-off events.

> Learning Agenda Kick-off

**LEARNING AGENDA KICK-OFF**

Formally kicking-off the learning agenda informs users and sets expectations for the process.

**Resources**

🌟 Presentation slides used by Lab/EIA to kick off the overall Lab ERL Plan process (USAID Internal)
Allocate resources appropriately for ALL phases of the knowledge cycle

One of the biggest challenges for any learning agenda, and especially if you want to focus on utilization, is securing sufficient human and budgetary resources to implement it. It’s fairly straightforward to commission a few studies or even a synthesis, but keep in mind that if we are striving for USE of the evidence, it’s more likely to be used when it’s coming from a trusted colleague. Using “insourcing” of learning activities, for example, by assigning our own staff to conduct original research can be helpful. This also alleviates some of the pressure on the budgetary resources, but it comes with a tradeoff—the people conducting this research must have dedicated LOE to do it. Ideally, the insourced research and/or synthesis should be their primary job responsibility so that the research does not succumb to the tyranny of the urgent over the important. And don’t neglect to resource the behavior change aspect of the program design! That behavior change effort will often be a bigger lift than the other steps combined, so if this area is under-resourced, you’ll have set yourself up for failure before you’ve even begun.

Bias yourself toward action on implementation of the plan - don’t design it to death

Remember that there is an opportunity cost to spending time and resources on design. For example, say we take two years to answer a question, then another two years to support adaptation based on that answer, we may have missed the window in which that adaptation could have made a real difference. Don’t let the “perfect” become the enemy of the “good enough”—remember that humans learn best by doing, so be willing to try some things even if they aren’t fully baked.
Implementation of the learning agenda is its own learning opportunity - testing the process and products and adapting based on measurement and feedback - is essential to this approach. In this phase, you will manage implementation of the learning agenda; facilitate evidence and learning uptake; and collect and analyze stakeholder feedback and learning outcomes to drive refinement, iteration, and adaptation on the learning agenda. The goal of this phase is to continuously improve the learning agenda processes and products to best achieve uptake amongst key decision-makers.
Monitoring, evaluation, learning, and adaption

Remaining responsive to stakeholder needs requires regularly soliciting feedback and acting on this information to improve the process and focus of the learning agenda.

Monitoring and evaluation of the learning agenda itself can play a key role in understanding whether - and if so, how - the learning agenda process and products are seen as useful and useable by key stakeholders; and whether the overall effort is contributing toward evidence-informed decision making practices.

> Plan for and conduct monitoring and evaluation
> Adaptive management

PLAN FOR AND CONDUCT MONITORING AND EVALUATION

Ongoing monitoring and evaluation allows for accountability and learning related to the learning agenda.

What

Data from monitoring and evaluation can support accountability for results and provide evidence to improve the design and implementation of the learning agenda.

Why

'Learning about learning' - in order to adapt, and share successes and challenges with the broader MEL community at USAID - is a critical pursuit; particularly insofar as M&E can be used to understand whether evidence is being used.

How

1. Establish key indicators to track regarding the learning agenda. These indicators can focus on inputs, outputs and outcomes related to the learning agenda process. Keeping the number of indicators feasible regarding the level of resources and time needed to collect them is important.
PLAN FOR AND CONDUCT MONITORING AND EVALUATION

Ongoing monitoring and evaluation allows for accountability and learning related to the learning agenda.

**How (continued)**

2. Decide on the feasibility and timing of any evaluative effort. Often the timing of a learning agenda precludes a formal evaluation; although methods such as outcome harvesting can allow for adaptive management to be practiced in real-time.

3. Establish a monitoring system to store and track indicator data. This could be a separate spreadsheet or integrated into other documents such as work plans.

4. Plan and conduct an evaluative effort ensuring that the timing for any findings allows for incorporation into the learning agenda effort or future efforts.

**Resources**

★ Process Diary Template (USAID Internal)
★ Monitoring Toolkit and Evaluation Toolkit

> Plan for and conduct monitoring and evaluation
> Adaptive management
Monitoring, evaluation, learning, and adaption

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> Plan for, and conduct, monitoring and evaluation
> Adaptive management

ADAPTIVE MANAGEMENT

Strategically adapting the focus of learning agenda questions, activities or products.

What

Learning agendas need to adapt over time to remain relevant, responsive and usable.

Why

The process of learning is ongoing; therefore, ensuring that the learning agenda, its questions and plans are adapted to take into account changing priorities and circumstances is often critical to maintaining relevance to end users and decision makers. Once determined to be satisfactorily addressed, learning questions can be 'retired', and existing questions can be reframed, or new questions added, to realign with new or emerging priorities.

How

1. Establish a regular pattern and process for reviewing and reflecting on monitoring and evaluation data. This cadence should be identified in your implementation workplan.
Monitoring, evaluation, learning, and adaption

Remaining responsive to stakeholder needs requires regularly soliciting feedback and acting on this information to improve the process and focus of the learning agenda.

Monitoring and evaluation of the learning agenda itself can play a key role in understanding whether - and if so, how - the learning agenda process and products are seen as useful and useable by key stakeholders; and whether the overall effort is contributing toward evidence-informed decision making practices.

How (continued)

2. Conduct After Action Reviews following key learning activities, events or products to incorporate immediate lessons learned from these processes. Document these lessons learned for future reference.

3. Periodically bring the team, leadership and users to review, update and reflect on monitoring and, if applicable, evaluation data.

4. Document the learning process. It can also be useful to document the use of learning agendas through formal documents, like process diaries, as well as through other adaptive management documentation processes such as action trackers or pivot or change logs. Process diaries can help detail what the learning agenda achieved and how it adapted and adjusted in accordance with shifting circumstances.

ADAPTIVE MANAGEMENT

Strategically adapting the focus of learning agenda questions, activities or products.

> Plan for, and conduct, monitoring and evaluation
> Adaptive management
**Monitoring, evaluation, learning, and adaption**

Remaining responsive to stakeholder needs requires regularly soliciting feedback and acting on this information to improve the process and focus of the learning agenda.

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> Plan for, and conduct, monitoring and evaluation
> Adaptive management

**ADAPTIVE MANAGEMENT**

Strategically adapting the focus of learning agenda questions, activities or products.

**Resources**

- Adaptive Management Briefer
- Knowing when to Adapt: Decision Tree - This job aid will help you determine how best to resolve a challenge/issue in programming. It is intended for use by USAID, partners, and others working in international development
- Example Adaptive Management tracking tool (USAID Internal)
- Facilitating Pause & Reflect
- After Action Review Resource
Produce useful learning outputs

Evidence use is heavily influenced by its accessibility, as well as motivation, ability, and opportunities for decision makers to act on it.

> Produce useful learning outputs

PRODUCE USEFUL LEARNING OUTPUTS

Generate accessible and tailored learning products.

What

Producing evidence that can be easily read, understood and digested by users is critical to supporting internalization and use. Using a mix of outputs to share progress and findings regularly can support effective communication and usage.

Why

Outputs that summarize and visualize evidence in useful and useable formats are critical in supporting evidence awareness, internalization and usage.

How

1. Review the stakeholder analysis and user research outputs.

2. Assess if additional research or information is needed to design the learning outputs, if so, conduct additional research or collect additional information.

3. Brainstorm potential types of learning outputs suitable and appropriate for the user. Potential outputs could include: email correspondence, written or in-person briefs, handouts, webinars or websites, blogs, brochures, visualizations, or data placemats.
Produce learning outputs

Evidence use is heavily influenced by its accessibility, as well as motivation, ability, and opportunities for decision makers to act on it.

> Produce useful learning outputs

PRODUCE USEFUL LEARNING OUTPUTS

Generate accessible and tailored learning products.

How (continued)

4. Design and produce learning outputs integrating evidence produced as necessary.

5. Share output drafts for feedback either internally or with select group of users.

6. Revise and adjust accordingly based on comments and feedback.

7. Disseminate and communicate finalized learning outputs with users based on communications and engagement strategy.

Resources

⭐ Findings, Recommendations and Conclusions Template Guide (USAID Internal)

⭐ A Sense of Design: Creating Multi-Sensory Experiences with Data

⭐ See page 17 of the Learning Agenda Landscape Analysis for examples of learning outputs
Disseminate evidence and learning

A learning agenda is only as successful as its ability to produce timely and useful findings for users. It is therefore critical to ensure that information is frequently produced, and regularly shared and disseminated to users and decision makers.

The purpose of ongoing, frequent and tailored communication of evidence is to support user awareness, understanding and uptake of relevant knowledge.

> Dissemination methods / strategies

DISSEMINATION METHODS / STRATEGIES

Share and disseminate targeted and timely evidence in varied and appropriate formats.

What

Evidence needs to be shared in order to be internalized and, ultimately, used. Producing tailored learning outputs that meet stakeholder needs, and sharing them through relevant channels is a key step in the knowledge cycle.

Why

The purpose of targeted dissemination is to ensure that evidence gets in the right hands at the right time, in order to be used.

How

1. Review stakeholder analysis, user research and stakeholder engagement documents to understanding potential sharing and dissemination opportunities. Sometimes, this involves leveraging existing meetings, events or activities. In other cases, specific and tailored opportunities may need to be conducted.
Disseminate evidence and learning

A learning agenda is only as successful as its ability to produce timely and useful findings for users. It is therefore critical to ensure that information is frequently produced, and regularly shared and disseminated to users and decision makers.

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> Dissemination methods / strategies

DISSEMINATION METHODS / STRATEGIES

Share and disseminate targeted and timely evidence in varied and appropriate formats.

How (continued)

2. Brainstorm appropriate communication methods to share progress and findings: Ensuring that findings and the status of the learning agenda is shared with end users and decision makers in a regular fashion has been shown to support effective usage. This may include: email correspondence, surveys, briefs, in-person learning symposia or trainings, handouts, webinars, and website-related platforms. Other modalities that could be used include social media, blogs, bibliographies, brochures, data visualization, data placemats, internal “Academy Day” or conference sessions, infographics and story maps. Choose the most appropriate learning events to share and disseminate findings.

Revisiting your stakeholder analysis, the core team should decide which, if any, learning events should be used to share and disseminate findings with the key audiences. Smaller team level meetings or larger all-staff events or conferences two examples of this type of learning events. Consider hosting a regular learning event and producing an overall product. Annual or close-out learning events and workshops can also be used to identify the most critical findings, provide a broader opportunity to co-create recommendations or action plan together across teams. Often it can be helpful to aggregate findings across the learning agenda and collate or curate materials in one place electronically or in one printed document for end users and decision makers future reference. This can also serve as a final report or deliverable if this is needed.
Disseminate evidence and learning

A learning agenda is only as successful as its ability to produce timely and useful findings for users. It is therefore critical to ensure that information is frequently produced, and regularly shared and disseminated to users and decision makers.

The purpose of ongoing, frequent and tailored communication of evidence is to support user awareness, understanding and uptake of relevant knowledge.

> Dissemination methods / strategies

DISSEMINATION METHODS / STRATEGIES

Share and disseminate targeted and timely evidence in varied and appropriate formats.

How (continued)

3. Update the stakeholder engagement plan. At this point, it would be appropriate to formally update the plan to incorporate and integrate the latest thinking on sharing and dissemination.

4. Produce relevant products to support identified dissemination plans. Once these plans are finalized, it may be necessary to update your workplan.

5. Implement and monitor these internalization opportunities. Beyond executing these plans, it is also important to consider monitoring of the opportunities themselves to ensure that you continually improve the design and delivery of these opportunities.
Disseminate evidence and learning

A learning agenda is only as successful as its ability to produce timely and useful findings for users. It is therefore critical to ensure that information is frequently produced, and regularly shared and disseminated to users and decision makers.

The purpose of ongoing, frequent and tailored communication of evidence is to support user awareness, understanding and uptake of relevant knowledge.

> Dissemination methods / strategies

DISSEMINATION METHODS / STRATEGIES

Share and disseminate targeted and timely evidence in varied and appropriate formats.

Resources

- ★ Agenda Template for SLRs - a guide to Content Coordinators to support the Strategic Learning Review event (USAID Internal)
- ★ Unconference Guide - a guide to using the ‘unconference’ approach to events (USAID Internal)
- ★ DRG Center Academy Day agenda - an example of an all-day learning event (USAID Internal)
Facilitate learning uptake
In conjunction with the communication and engagement plan, providing ongoing and tailored support to targeted stakeholders can improve user awareness of learning agenda findings, and allow for time and space for internalization and uptake of evidence.

> Uptake facilitation/ Learning internalization methods

**UPTAKE FACILITATION/ LEARNING INTERNALIZATION METHODS**

Plan and implement evidence internalization and use activities with stakeholders.

**What**
Plan and implement appropriate support and time to enable users to more easily access, internalize, and use evidence.

**Why**
Even evidence that has been widely shared might never be used to inform decision making. Without active support and facilitation, even the most compelling evidence can be overcome by the challenges of limited time, attention, and focus. Internalization and uptake of evidence by users must be supported through thoughtful and tailored interventions.
Facilitate learning uptake

In conjunction with the communication and engagement plan, providing ongoing and tailored support to targeted stakeholders can improve user awareness of learning agenda findings, and allow for time and space for internalization and uptake of evidence.

> Uptake facilitation/ Learning internalization methods

**UPTAKE FACILITATION/ LEARNING INTERNALIZATION METHODS**

Plan and implement evidence internalization and use activities with stakeholders.

**How**

1. Review the implementation work plan as evidence is produced or synthesized by the learning agenda, and develop targeted and tailored data internalization opportunities with key users/ decision makers. As findings are generated through the learning activities and shared through the learning products, this new information should be internalized by end users. Internalization can be supported through targeted learning products, learning events, or other activities. Internalization can in turn support changes in attitudes and behavior, including identifying practices that should be continued, adapted or stopped.

   **TIP:** Using learning events or other types of “Pause and Reflect” workshops can help support both internalization of findings and provide space for other types of learning. Facilitating the generation of recommendations and concrete actions together with key stakeholders by analyzing and interpreting findings from the learning agenda and co-planning what to do about them is another approach.
Facilitate learning uptake
In conjunction with the communication and engagement plan, providing ongoing and tailored support to targeted stakeholders can improve user awareness of learning agenda findings, and allow for time and space for internalization and uptake of evidence.

> Uptake facilitation/ Learning internalization methods

**UPTAKE FACILITATION/ LEARNING INTERNALIZATION METHODS**

Plan and implement evidence internalization and use activities with stakeholders.

**Resources**

- Participatory Facilitation Techniques
- Designing Participatory Meetings and Brown Bags
- Liberating Structures
- GameStorming
Stop at “good enough” data and evidence for decision-making

While there is always more we can know, it’s important to recognize when enough has been learned to move to action. It’s easy to fall into the “paralysis by analysis” trap. If you can spend 50% more money to become 5% more certain of the outcome, is that a good use of resources? Will 5% greater certainty change the decision you would have made without the extra evidence? If not, you should use your judgment and lean towards investing in implementation. (Of course, there is an important caveat: do no harm. If there is a reason to believe that the decisions made within that 5% uncertainty could cause active harm, this changes the equation.) Remember that there is both a financial and an opportunity cost to waiting for more evidence—it takes time to gather and analyze it, and that’s time that you’re not implementing adaptively.

Adapt and document your process

Often needs and priorities change over time, ensuring that you are not able to adapt to these changes but be clear why and how you are changing is critical. Often this comes down to documentation and ensuring that any changes are clearly recorded and communicated. Sometimes small contextual changes can have larger implications than larger ones so discussing how the needs of users and decision makers may adapt or evolve is critical to making the right decisions.
Learning (in the) Lab: A Utilization-Focused Learning Agenda Playbook was authored by Matthew Baker (Dexis Consulting Group), Shannon Griswold (USAID), and Jessica Lucas (Apprio, Inc.). Additional design and editing support were provided by Ian Lathrop (Dexis Consulting Group). Miya Su Rowe provided the graphic design.

A USAID Internal version of this document was originally published by the USAID LEARN mechanism in September 2019, with funding from the U.S. Global Development Lab. USAID LEARN is managed by Dexis Consulting Group and its partner, RTI International. Opinions presented in the document do not necessarily reflect the views of the U.S. Agency for International Development or the U.S. Government.

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