



USAID
FROM THE AMERICAN PEOPLE

TIPS FOR CREATING A LEARNING AGENDA

Based on the findings of a Landscape Analysis of Learning Agendas at USAID



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* NOTE: WORD CLOUD ABOVE IS A STYLIZED
VERSION OF THE WORD FREQUENCIES
FROM THE INTERVIEW NOTES.

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The stylized word cloud above depicts word frequencies from the interview notes.

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ACRONYMS LIST

ADS	Automated Directives Service
AMELP	Activity Monitoring, Evaluation, and Learning Plan
CDCS	Country Development Cooperation Strategy
CLA	Collaborating, Learning, and Adapting
LER	Learning, Evaluation and Research
MEL	Monitoring, Evaluation, and Learning
PMELP	Project Monitoring, Evaluation, and Learning Plan
PMP	Performance Management Plan
PPL	Bureau for Policy, Planning, and Learning
USAID	United States Agency for International Development

BACKGROUND¹

INTRODUCTION

U.S. Government agencies and development organizations around the world are increasingly recognizing and supporting intentional learning often informed by learning agendas. These are viewed as important tools for improving organizational effectiveness and efficiency. This document outlines ways a learning agenda may benefit an operating unit or team and describes characteristics of an effective learning agenda; it offers general steps to aid in the development of this tool. This document was created with USAID in mind, but its contents are applicable to partners and other Agencies seeking to enhance organizational and program-related learning.

The term *team*, used throughout this document, refers to a collection of individuals usefully involved in developing and implementing a learning agenda. It may include USAID staff members from an office or project-based teams, and can involve implementing partners, government partners, USAID mission staff and other external organizations, depending on the nature, level and purpose of the learning agenda.

WHAT IS A LEARNING AGENDA?

A learning agenda is a set of questions, planned activities and products that facilitate learning and decision making within an organization, operating unit, or team. Learning agendas may rise to the strategy level of the operating unit, may address more specific project- or activity-level concerns or may facilitate learning at multiple levels.

REASONS FOR DEVELOPING A LEARNING AGENDA

- A need to identify inefficiencies and/or knowledge gaps hindering the success of a team's work
- Lack of sufficient information or evidence to guide a team's decision making when action is needed on (an) issue(s)
- Desire to develop a strategic plan for gathering knowledge and data that stems from valuing continuous learning



For USAID staff, learning agendas can be used during the development of the Country Development Cooperation Strategy (CDCS) or during project or activity design. Learning agendas can also be used on an ongoing basis to address knowledge gaps, support the development and refinement of theories of

¹ This document builds on insights from a 2017 [landscape analysis of learning agendas in USAID/Washington, DC, and beyond](#). The full report, accompanying resources and examples can be found on the [USAID Learning Lab](#) as well as [USAID's development experience clearinghouse](#).

change or proactively identify uncertainties and potential shifts in context. Notably, a learning agenda can uncover assumptions, explore uncertainties and fill evidence gaps at any point during the design and/or implementation of the Program Cycle.

ADDITIONAL BENEFITS OF THE LEARNING AGENDA DEVELOPMENT PROCESS

While utilizing a learning agenda facilitates decision making, the highly iterative process itself of developing a learning agenda has benefits for a team as well. Formulating learning agendas requires collaboration and dialogue, often resulting in staff coalescing around key priorities and energizing the achievement of results. More broadly, this process can also lead to significant shifts in staff behavior and organizational culture; using practices from USAID's concept of Collaborating, Learning, and Adapting (CLA) can be useful.

CLA is a set of practices that facilitates improved development effectiveness. Learning has always been part of USAID's work, and most USAID missions and implementing partners are already practicing some form of CLA. Dedicating the necessary resources to CLA allows for more systematic and intentional approaches throughout the Program Cycle. According to USAID's Program Cycle guidance (Automated Directives System, "ADS," 201.3.5.19), "Strategic collaboration, continuous learning, and adaptive management link together all components of the Program Cycle." Integrating CLA helps programs be intercoordinated, grounded in a strong evidence base and iteratively adapted to remain relevant throughout implementation. The systematic application of CLA approaches, led by people who have the knowledge and resources to carry them out, enables USAID to be an effective learning organization and thereby a more effective development organization.

In the simplest terms, integrating CLA throughout the Program Cycle can help development practitioners address challenges by considering:

- **COLLABORATING:** Are we collaborating with the right partners at the right time to promote synergy over stove-piping?
- **LEARNING:** Are we asking the most important questions and finding answers relevant to decision making?
- **ADAPTING:** Are we using the information gathered through collaboration and learning activities to arrive at better decisions and make adjustments as necessary?
- **ENABLING CONDITIONS:** Are we working in an organizational environment that supports CLA efforts?

LEARNING AGENDAS AT USAID MISSIONS

Per ADS 201, at the strategy level USAID missions are required to create a CLA Plan as part of the Performance Management Plans (PMPs). At the project level, Missions are required to generate Project Monitoring, Evaluation, and Learning Plans (PMELPs). At the activity level, Missions are responsible for overseeing the implementing partners' creation of Activity Monitoring, Evaluation, and Learning Plans

(AMELPs). Identifying learning priorities and developing appropriate performance monitoring requirements facilitates a coherent learning agenda that incorporates various MEL activities at different levels. Programmatic and operational considerations should be considered and integrated into any learning agenda so that systematic learning is integrated into the fabric of Missions' strategies, projects and activities, while reducing duplicative efforts.

COMPONENTS OF A LEARNING AGENDA

- **LEARNING QUESTIONS:** A set of learning questions that stems from the most important gaps in knowledge identified by the team can inform the team's work and aid in the development of theories of change and understanding of contextual and programmatic shifts.
- **LEARNING ACTIVITIES:** A team can formulate a plan by answering learning questions. Depending on what these questions address, learning activities, then, can be catered to a number of different forms and methods. Examples of ongoing learning activities include events like portfolio reviews or midcourse stocktaking, processes and analyses such as monitoring and evaluation data or academic research and analysis. Depending on the type of learning, engaging with relevant stakeholders within and outside the organization may be appropriate, particularly when focused on tacit and experiential knowledge.



- **LEARNING PRODUCTS:** These deliverables are based on the outcomes of learning activities and ideally are utilization focused. The team should design its learning products to communicate evidence and findings to key stakeholders to inform decision making and program design.

CHARACTERISTICS OF A GOOD LEARNING AGENDA

- **FLEXIBLE:** Design the learning agenda as a living document that can adapt to a team's changing priorities and circumstances. Allowing for new or more refined questions to emerge from the process and paying attention over time to emergent patterns from data can inform new or revised areas of inquiry.
- **REALISTIC:** Consider what the team can achieve based on internal (e.g., staff resources) and external (e.g., leadership approval) barriers or constraints.
- **INCLUSIVE:** Obtain buy-in and participation from your key stakeholders early in the life of the learning agenda to capture various perspectives and inform and extract learning from those involved.

- **ACTIONABLE:** Identify key current and future decision points and work backward so that knowledge generated can be fed into these decision points to allow immediate uptake and use.

STEPS FOR CREATING A LEARNING AGENDA

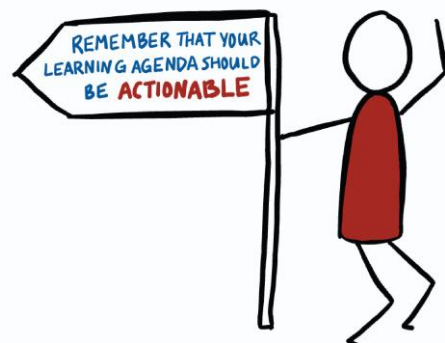
I. COLLABORATE WITH KEY STAKEHOLDERS

The first step in developing a learning agenda is engaging with all relevant stakeholders. As a starting point, form a core team that will drive the development and implementation process forward. Consider individuals' skills and availability as well as their ability to represent key constituencies. Next, obtain leadership buy-in, identifying the roles leaders can fill and the opportunities they will have to encourage and support the initiative. Finally, identify the individuals who will support and benefit from the team's learning agenda as well as the appropriate level of engagement required of them. The following list of possible responsibilities can serve as a helpful starting point when considering how different individuals will engage:

- **INFORM:** Receive objective information on the learning agenda
- **CONSULT:** Obtain feedback from stakeholders at a certain time to inform decision making
- **PARTICIPATE:** Offer systematic feedback for integration into decision-making processes, considering ways to elicit knowledge and analyze data
- **COLLABORATE:** Hold active ownership over the learning agenda formulation and implementation
- **APPROVE:** Make final decisions on higher level or key aspects of the learning agenda

2. FORMULATE AND PRIORITIZE LEARNING QUESTIONS

EXAMINE ASSUMPTIONS AND NEEDS: When developing learning questions, think through how they will inform the team's work. Review a theory of change, strategy document, key assumptions and hypotheses and upcoming decision points (e.g., portfolio reviews or activity designs) likely to arise during the planning and implementation of the learning agenda. Draw on stakeholders for their thoughts and opinions at this stage to capture their perspectives while increasing their ownership in the final product. To achieve better development results given limited resources, prioritize the most critical questions in order of importance and need.



SOURCE IDEAS INCLUSIVELY AND WIDELY AS NEEDED: There are a number of available techniques to source ideas for learning questions. Beginning with a more free-form information-gathering phase through informal conversations or semistructured interviews allows data synthesis and

provides a focus of key areas for the team to explore. Methods for facilitating these discussions include surveys, brainstorming sessions and collaborative team exercises. Additional opportunities to identify key learning questions include: evaluations, performance-, context- and complementary-monitoring data, holding after-action reviews, midcourse stock takings, regular reflection exercises or peer assists.

PRIORITIZE, PRIORITIZE, PRIORITIZE: Once a list of potential questions is in place, the team should prioritize the most critical questions for the learning agenda. Developing a set of criteria to guide decision making will provide a more objective lens through which to assess potential learning questions across the qualities the team deems most important. Prioritizing can aid understanding of manageable changes, determine decisions that can be informed directly and allow for successful adaptive management.

LINK LEARNING QUESTIONS TO STRATEGIC OBJECTIVES OR GOALS: Learning agenda initiatives that can link learning questions and themes to relevant policy objectives and strategies are more likely to be sustainable and relevant. These high-level objectives often provide an organizing framework for more specific questions elicited from stakeholders. They also help ensure that the agendas serve and are related to broader strategic priorities and decision-making needs. Learning agendas can then feed into existing business processes, including the development of research agendas, PMPs, monitoring, evaluation, and learning (MEL) plans, evaluation plans, and CLA plans.

LEVERAGE LEADERSHIP AND RESOURCES: Interviewees identified leadership support as critical to the success of their initiatives. In particular, explicit mandates, dedicated resources and increased visibility for learning agenda efforts provided credibility and signaled them to be a priority that motivated broad-based participation in their formulation, implementation, and use.

3. DEVELOP A PLAN TO ANSWER QUESTIONS

Before jumping into the task of answering the learning questions, take stock of what others have already done that can contribute to this task. If appropriate, begin with a literature review related to the work at hand by operating unit, collaborators and external organizations to identify gaps in knowledge and gain a better understanding of the direction the learning agenda should take.

Once the team is acquainted with the landscape, develop an action plan for addressing each of the specific learning questions that spells out the learning activities to be conducted. This should include methods to employ, a schedule for collecting and analyzing data, and a determination of who will play a role in contributing to each question. Types of learning activities include:

- Carrying out mandatory and other appropriate analyses that consider such factors as gender, environmental and climate risk, 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 tacit and experiential knowledge through facilitated dialogues and other participatory methods;
- Conducting after-action reviews, midcourse stock takings, regular reflection exercises or peer assists and learning networks

As a final component of the plan, indicate anticipated deliverables for the learning products. Using a variety of communication methods to share progress and findings has been shown to support effective usage. This may include email correspondence, surveys, briefs, handouts, webinars and website-related platforms. Additionally, consider social media, blogs, bibliographies, brochures, data visualization, data placemats, infographics and story maps.

BE ACTION ORIENTED: Remember that the learning agenda should be actionable, and the team should think through intentionally the best way to communicate information learned as concisely as possible to your stakeholders. Making learning products audience appropriate and using a variety of audio-visual approaches has been shown to support utilization of knowledge. In addition, learning products can also be co-created in a collaborative fashion to improve uptake.

LEARN THROUGH MULTIPLE KNOWLEDGE SOURCES: Ideally, learning agenda efforts will focus on strengthening the quality and variety of knowledge sources to enhance learning. Learning for continual improvement often necessitates multiple knowledge sources. These can include in-person group seminars and workshops, formal presentations among working groups and communities of practice and the collation and dissemination of case studies and stories related to tacit knowledge and experiences.

COLLABORATE, COLLABORATE, COLLABORATE: Integrating iterative, consultative processes with diverse stakeholders throughout the formulation and implementation of learning agendas is often important for success. Participatory processes foster engagement and buy-in, enhance learning agenda relevance and use, and facilitate coordination and collaboration. It is equally important, however, to know when and how to limit consensus-building and collaboration to keep efforts moving forward and avoid “consensus fatigue.”

4. IMPLEMENT PLAN AND REVIEW QUESTIONS

As implementation of the learning activities takes place, periodically update, refine, remove and add to the learning questions and activities so that the learning agenda remains relevant and action oriented. Such updates can be integrated into regularly scheduled activities, such as portfolio reviews or new meetings and sessions structured appropriately for the content, (e.g., pause and reflect sessions).² Integrating new or refined learning questions as the agenda is being implemented, aids in its continued validity and relevance.

² For a comprehensive set of examples, see "[Walking the Talk: LEARN's Pause & Reflect Practices](#)" from USAID Learning Lab. For an example outside development, see [NASA's Pause and Learn](#). Another shorter, specific technique that can be integrated into ongoing meetings, for example, could be a [What? So what? Now What?](#) exercise.

USE KNOWLEDGE TO INFORM DECISIONS: As interviewees noted, focusing on knowledge use increased the relevance and application of new learning. In addition, it often inspired the development of innovative products and platforms such as webinars and infographics for specific audiences. Relatedly, learning agenda initiatives can also be oriented toward addressing the need to improve the collection and dissemination of evidence to make it more easily accessible to end-users, thereby promoting the use of evidence in decision making.

FOCUS ON THE PROCESS: The process of developing a learning agenda has often created significant shifts in staff behavior and organizational culture around CLA. In addition, most viewed their learning agendas as a dynamic “living process” with built-in feedback loops that adapted learning questions, activities and products to reflect changes in evidence needs, contexts or priorities.

USE LEARNING TO ADAPT WORK

As findings are generated through learning activities and shared through learning products, this new knowledge should be integrated into new or existing processes to understand better what is working, what needs to be stopped or what should be adapted. Using learning agenda findings during the formulation of learning agenda questions is key to identifying decision points and actions ahead of time. It also aids in teasing out learning questions that are critical from those that are simply nice to know. Formally documenting the use of learning agendas through process diaries or other adaptive management documentation such as action trackers or pivot or change logs, is recommended. Integrating other adaptive management techniques into a learning agenda process can ensure that the knowledge generated will be used effectively.

LEARNING QUESTIONS CHECKLIST

Use this checklist when developing or reviewing learning questions. Incorporates considerations generated by USAID LEARN, USAID/PPL, and Catholic Relief Services, and the TOPS Program.

FOCUSED

- Is the question clear?
- Is the question focused? Will the question, when answered, help us be more effective?
- Does the question test/explore our theory of change, build/explore our evidence base, and/or help us be more responsive to changes in context? (see CLA framework and maturity tool under the Learning component)

USEFUL

- Has the question not yet been answered? (Always check first if your question has already been answered.)
- Does the question have clear use / applicability in our work?
- Does the question inform programmatic decisions?
- Will possible answers to the question help us identify specific actions that we should take or avoid?

FEASIBLE

- Is the question feasible to answer?
- Do the anticipated benefits of answering the question outweigh the effort required?
- Is it possible to answer the question in a timely manner so that answers inform our decision-making and management processes?

GENERATIVE & INCLUSIVE

- Is the question likely to generate fresh and innovative thinking?
- Does the question leave room for that which we did not think to ask?
- Has the question been developed with or reviewed by those who will be answering it?