The Role of Learning Agendas for Federal Agencies' Pursuit of Evidence-Based Policymaking

Tuesday, March 9, 2021
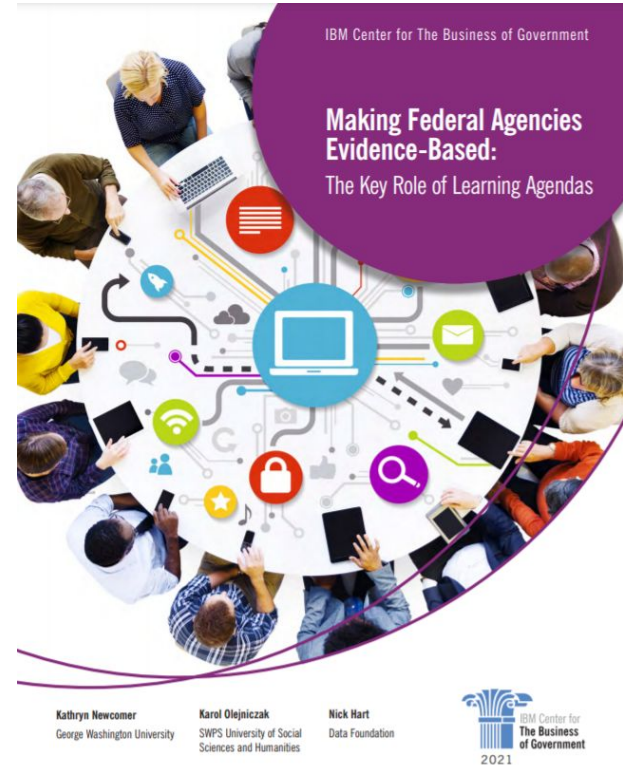
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Making Federal Agencies Evidence-Based:
The Key Role of Learning Agendas

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2021

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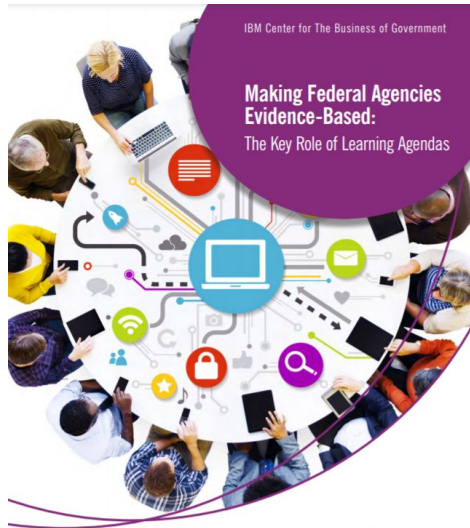Professor, George Washington Univ.
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Making Federal Agencies Evidence-Based:
The Key Role of Learning Agendas

Learning agendas present a tool to be used as one aspect of organizational strategic planning that specifically focuses on the generation of relevant knowledge for decision makers, organizational leaders, and stakeholders.

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What is a learning agenda?

A learning agenda, or evidence-building plan, is comprised of a **set of prioritized questions about evidence needs** to inform future decision making in an organization.

The questions and analytical approaches to address the questions are **collaboratively developed** by organizational leaders, staff, and stakeholders.

The agenda **clarifies how and when priority questions will be addressed** to provide findings useful to organizational leaders for informing decision making and improvement of an agency's effectiveness.

Definition of a Learning Agenda

Defined in the Foundations for Evidence-Based Policymaking Act of 2018 (P.L. 115-435) as an agency evidence-building plan:

"§ 312. Agency evidence-building plan

"(a) REQUIREMENT.—The head of each agency shall include in the strategic plan required under section 306 a systematic plan for identifying and addressing policy questions relevant to the programs, policies, and regulations of the agency. Such plan shall contain the following:

"(1) A list of policy-relevant questions for which the agency intends to develop evidence to support policymaking.

"(2) A list of data the agency intends to collect, use, or acquire to facilitate the use of evidence in policymaking.

"(3) A list of methods and analytical approaches that may be used to develop evidence to support policymaking.

"(4) A list of any challenges to developing evidence to support policymaking, including any statutory or other restrictions to accessing relevant data.

"(5) A description of the steps the agency will take to accomplish paragraphs (1) and (2).

"(6) Any other information as required by guidance issued by the Director.

Learning Agendas Can Bridge the Gap Between Producers and Users
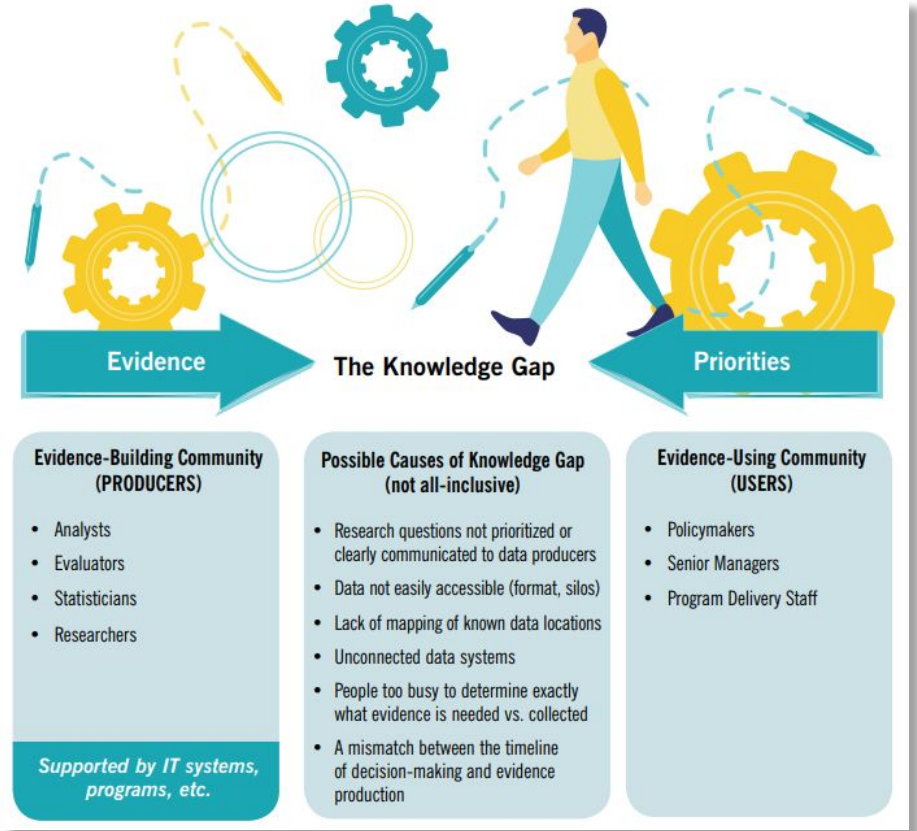
Desired Characteristics of the Learning Agenda Development Process

User-Oriented	Include program managers at the appropriate level in the organization who will actually use the information
Inclusive	Include both internal and external stakeholders, including relevant regional agency and state agency personnel, grantees advocacy groups, and congressional staff
Co-designed	Ensure an open, inclusive process where all participants feel comfortable offering input
Structured	Address the same key points in each session, e.g., relevant strategic goals, key users, key decision points
Interactive	Encourage that program managers, analysts and other stakeholders work in diverse small teams on each specific task or step in the development process
Tangible	Address actual programs and upcoming policy or programmatic decision-making points, do not look too far into the future
Iterative	View the agenda as a living document that will require adjustments and revisions as priorities and circumstances for programs and/or policies change
Top-Down Support	Secure both visible and actual support from the top leadership in the agency for the development process, and include high level executives in deliberation processes
Grass Roots Input	Ensure the program managers who will actually use the information provided through evaluation and research work listed on the agenda are actively involved and offer grounded ideas about where information gaps exist.

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12 Success Factors for Developing a Learning Agenda

1. Consult **leadership** across the organization to secure buy-in to the development process.

2. Identify relevant **stakeholders** and consider outreach strategies.

3. Determine major **decision points** for the program or organization.

4. Identify knowledge **needs** of users, including particular questions.

5. **Prioritize questions** in consultation with senior agency leaders and stakeholders.

6. Review **existing data** and evaluation studies to determine availability of existing evidence.

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12 Success Factors for Developing a Learning Agenda (cont'd)

7. Determine which data and **approaches** are relevant for addressing priority questions on the agenda.

8. Produce a written **draft** of the plan for review, reflection, and agreement.

9. **Share** the learning agenda with key stakeholders, and then publicly

10. Apply **resources** to address priority questions.

11. Periodically **review** the plan with senior leaders.

12. **Revise** the agenda periodically to incorporate new learning, evidence, and priorities.

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Lessons Learned on Benefits of Developing a Learning Agenda in Federal Agencies

	Builds relationships across senior leaders
	Institutionalizes the learning process
	Educates leaders about evaluative thinking
	Prioritizes evidence-building resources
	Shares thoughts and insights about mission achievement and progress across program management and analytical staff
	Educates program managers about existing sources of data or previously conducted analyses that they may not be aware of
	Calibrates information needs in changing contexts
	Recognizes interorganizational information gaps

Learning Agenda Design Sprint (LADS)

Practical challenges of designing Learning Agenda

(1) Aligning perspectives of users and producers

(2) Managing the flood of questions

(3) Merging fragmented evidence into streams

3 questions before starting: scope, progress, participants

7 steps of the LADS process

STEP 1: Develop a Stakeholder Map

STEP 2: Identify Key Decision Points

STEP 3: Catalog Knowledge Needs of Evidence Users
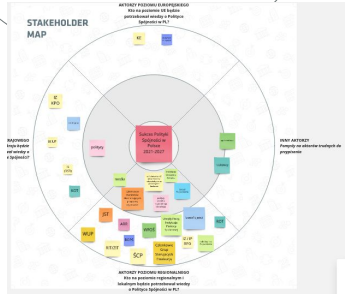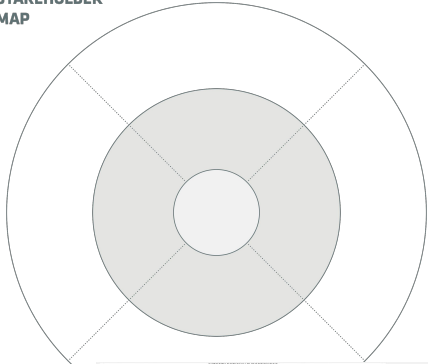
STEP 4: Collect Feedback from Senior Management

STEP 5: Plan Learning Activities

STEP 6: Collect Feedback from Evidence Users

STEP 7: Review the Final Product and Process

LADS boards

STAKEHOLDER MAP

KEY MOMENTS

KNOWLEDGE USERS

KNOWLEDGE NEEDS

SOURCES

FEEDING METHODS

STRATEGIC GOAL

LEARNING AGENDA

Recommendations and Next Steps

- Congress should provide federal agencies **flexibility** to agencies to develop their learning agendas after the quadrennial strategic planning process has been finalized, not concurrently.

- Congress, the president, and senior agency leaders should prioritize allocating **resources** for learning needs and evidence-building activities.

- The Office of Management and Budget should update guidance to direct agencies to **publish** learning agendas publicly.

- Agency evaluation officers should strategically involve **stakeholders** when developing learning agendas using proactive engagement approaches tailored to the agency ecosystem.

- Federal agency evaluation officers should consider using the **Learning Agenda Design Sprint** model in order to more effectively engage stakeholders when developing learning agendas.

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Discussion and Q&A

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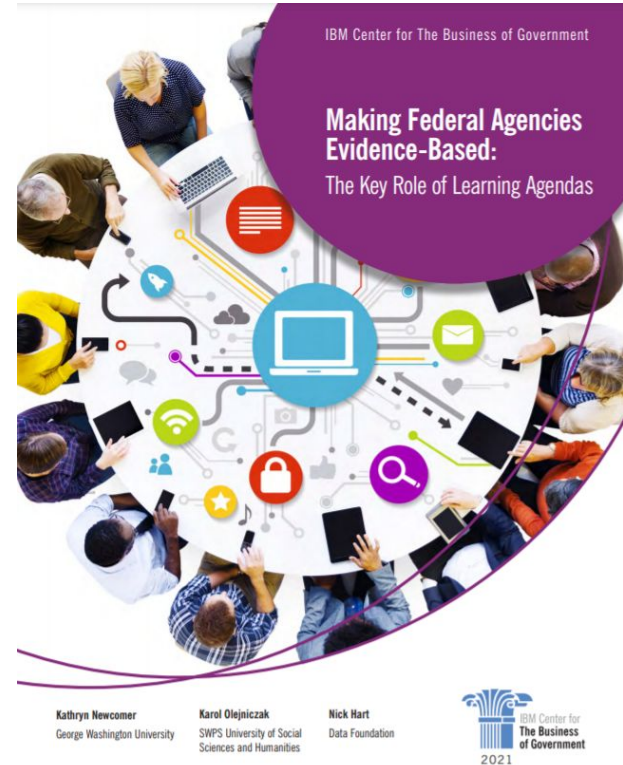
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