



PHOTO: UNICEF YEMEN

DEVELOPING A LEARNING AGENDA

A Learning Brief from the Applied Learning Team

USAID/Bureau for Humanitarian Assistance

January 2022

INTRODUCTION TO LEARNING AGENDAS

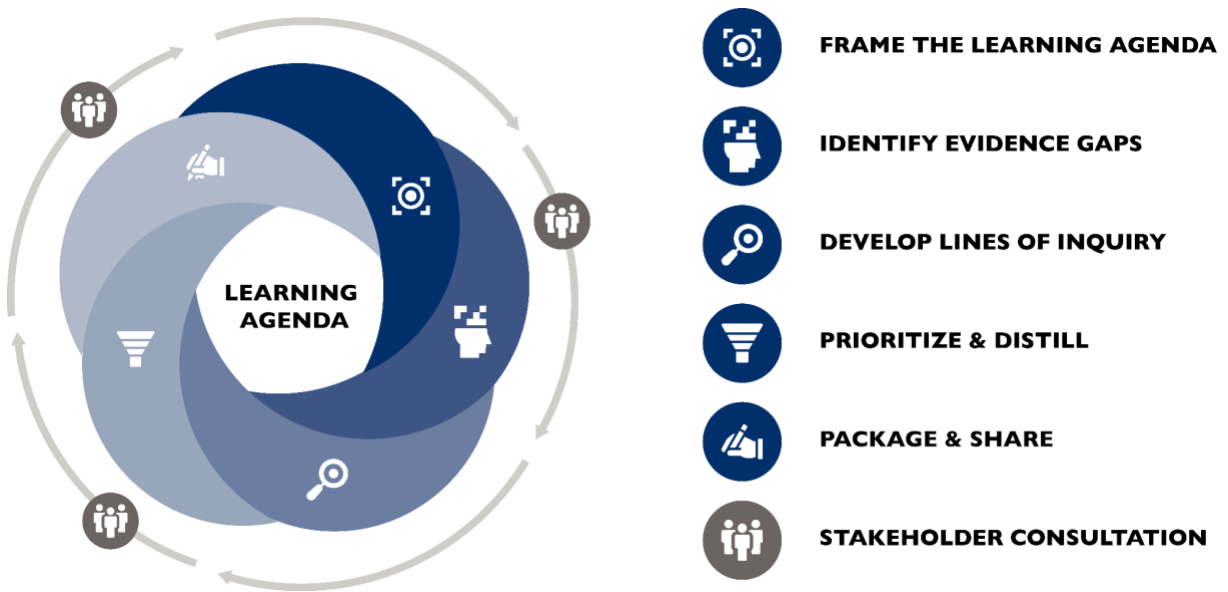
Learning agendas are a tool to intentionally plan for the generation of new evidence through the identification and prioritization of lines of inquiry, specific research, or learning questions. Answering these questions can lead to better decision-making and, ultimately, improve the quality of our work on behalf of the populations we serve.

The U.S. Office of Management and Budget defines a learning agenda as:

A LEARNING AGENDA is a set of broad questions directly related to the work that an agency conducts that, when answered, enables the agency to work more effectively and efficiently, particularly pertaining to evaluation, evidence, and decision-making. Once the questions are identified, a learning agenda also prioritizes and establishes a plan to answer short- and long-term questions of the highest value across relevant program and policy areas.

A learning agenda may seek answers through research and formal studies, evaluation, documentation and desk reviews, or qualitative inquiry and experiential learning. The evidence generated through implementing a learning agenda can help to identify best practices, new approaches and other improvements across our operations, whether technical, programmatic, managerial or logistical. It can also help us to substantiate or modify our understanding of the causal linkages that inform interventions and the contexts in which we operate. It can guide the development of new strategies, program design, new or improved policies, implementation planning, resource allocation or process improvements.

FIGURE 1: KEY STEPS TO DEVELOPING THE LEARNING AGENDA



FRAMING THE LEARNING AGENDA

The results from implementing a learning agenda will be most impactful when it is framed appropriately from the start. We need clarity on what the learning agenda will cover, the kinds of research it will include, who the key stakeholders will be, and how the evidence generated will be used and by whom.

From the start, it is important to articulate the specific aspect of BHA's work that the learning agenda will seek to inform through the generation of evidence. Key questions to consider that will help to define the span and scope of the learning agenda include:

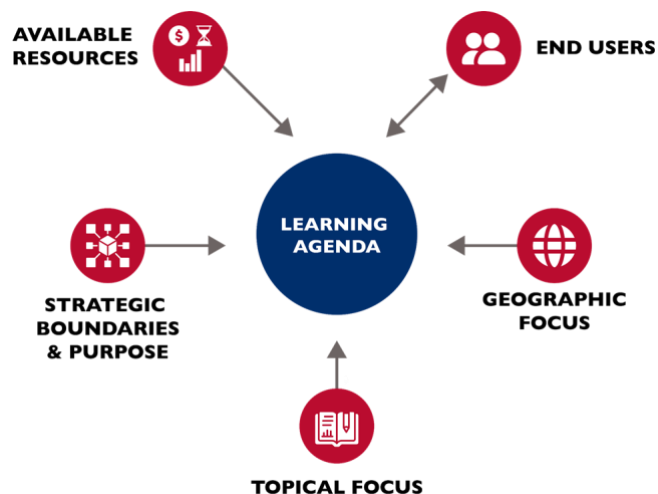
- **Geographic focus:** Is it designed to be relevant globally, will it have a regional focus, or will it be focused more narrowly on work within a specific country context, or at the activity level?
- **Topical focus:** Will the learning agenda cover specific sectors, cross-cutting issues, or thematic issues?
- **Boundaries:** Will a particular strategy or policy, set of operational or technical priorities, program design or other guiding element provide framing for the learning agenda? Will the learning agenda cover a specific time period?
- **Purpose:** Will the learning agenda seek to identify new scientific evidence, identify implementation pathways, provide a better understanding of context, or identify process improvements?

Clearly mapping out this **span and scope** will ensure the learning agenda is strategically focused on priority themes or areas of inquiry that are relevant to our work and aligned with identified outcomes or goals.

When defining the learning agenda's scope, **available resources**, including time, budget, and access to expertise and data are critical inputs. Whether the research questions will rely on randomized control trials, qualitative research, or existing data sets all have implications for the resources needed. These

resource considerations will determine the kinds of research that can be undertaken and the kinds of questions to be explored in later stages of the agenda's development.

FIGURE 2: ELEMENTS FRAMING THE LEARNING AGENDA



It is important to consider from the outset **who will be using the evidence** generated from the learning agenda and how. Where is demand emerging for the learning agenda? Will results be applied across multiple areas of operation, or very narrowly to a specific activity or internal process? Keep in mind that the results from research and learning efforts can be applied across BHA's operations, in the development or refinement of strategies, program design, implementation planning as

well as policy development, operational or process improvements — or even resource allocation decision-making. Clarity from the start around the potential application of the evidence will help to ensure that the framing of the learning agenda is realistic and focused as its development moves on to later stages.

DEVELOPING LINES OF INQUIRY

There is almost certainly a body of evidence in place around the subject of your inquiry. However, you'll need to map the already existing evidence base to identify the gaps that still need to be addressed and ensure that research is not being duplicated unnecessarily. There are many approaches to identifying existing evidence assets and gaps, ranging from sophisticated evidence mapping and synthesis exercises to desk reviews, expert roundtables, and other more consultative approaches. Working with a well-defined scope for the learning agenda will help to ensure that curating the evidence base is manageable and bounded by the priority themes that have been identified for the overall effort.

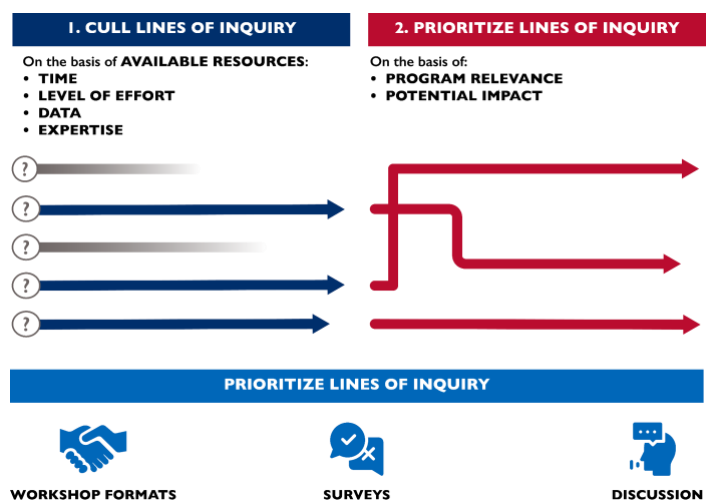
Please keep in mind that evidence mapping sometimes uncovers gaps that are not actually evidence gaps but, rather, gaps in awareness, application or capacity. For example, evidence mapping might uncover instances where staff are unaware of evidence that exists, or evidence that has not yet have been applied to new policy, process, guidance or training. Such examples can be helpful for other planning purposes but do not belong on a research and learning agenda. The aim of a learning agenda is to generate **new evidence**. In collaboration with key stakeholders, the evidence mapping effort helps to identify those focus areas - lines of inquiry - where evidence gaps exist.

PRIORITIZING AND DOCUMENTING LINES OF INQUIRY

Not every evidence gap is equally important, and not every evidence gap can be addressed given limited resources and time. Prioritizing the evidence gaps to be addressed will help lead to key lines of inquiry that are strategically important and feasible with available resources. This prioritization effort should be done in a consultative way with a broad set of stakeholders, including the ultimate end users of the evidence generated, in addition to thematic experts and researchers.

Your first step should be the culling of identified lines of inquiry based on the available resources — time, level of effort, data availability and available expertise — and the identified purpose of the learning agenda. Remove those lines of inquiry that cannot be feasibly answered or are a poor fit for your purpose. In addition, think through the ultimate use of the learning agenda — whether that is to inform strategy development, activity design, implementation planning, process improvements, or resource allocation. Again, some lines of inquiry can be a poor fit for the intended use of the learning agenda and should be removed.

FIGURE 3: SELECTING LINES OF INQUIRY



The next step in prioritization should be more consultative. With other stakeholders identify those lines of inquiry that are most likely to be impactful, while adding nuance or more specific questions that should be explored. With tighter, more focused lines of inquiry that take into account purpose and available resources, there are various ways to generate and capture input. Consultative activities can range from in-person or online workshop formats to broad surveys where stakeholders are asked to vote on those lines of inquiry deemed more and/or less valuable from their perspective. Discussion-focused sessions allow a nuanced exchange from various perspectives while surveys can reach a much broader set of stakeholders.

When many different stakeholder groups may be using the learning agenda, it might be useful to keep lines of inquiry broad, rather than delving into specific research-ready questions. This will allow different stakeholder groups to use the lines of inquiry to craft their own specific research questions appropriate to their organizational level, geography, topic and sector, or in terms of research purpose, type or resource availability.

STAKEHOLDER ENGAGEMENT

At each stage of the process, different stakeholders have important perspectives to inform the learning agenda. It is important to iteratively think through who needs to be involved and what input is needed and to plan for your stakeholder engagement. The following areas are important to bear in mind.

- **Identify when input is needed.** Each stage of the learning agenda development process will have different information needs, whether about scoping and framing, determining available resources, mapping of the evidence base, determining appropriate research methodologies, or other critical questions. Taking the time to determine what input from a varying set of stakeholders is needed at each stage will ensure the inclusion of important perspectives in decision making along the way.
- **Identify stakeholders.** Identifying stakeholder groups that can bring insight and diverse perspectives to each stage of the process helps to ensure that the learning agenda is relevant, well-informed and feasible. Consider what areas of expertise may bring important insights. Stakeholders may include subject matter experts and practitioners in the relevant technical or operational area(s) both within and outside of BHA. Cast a wide net and reach out to implementers, community members or program participants whose work may need to adapt to new evidence. It is also important to engage with learning advisors or monitoring and evaluation staff to benefit from their experience in learning agenda development and implementation.
- **Identify stakeholder roles.** Making sure that stakeholders understand their roles and why they have been asked to provide input in a particular area helps to ensure productive stakeholder involvement. Being intentional in the selection process for stakeholder engagement can also help to foster a shared understanding of the process amongst participants by defining the scope of the learning agenda at each stage.

DOCUMENTATION

Documenting the learning agenda process is often overlooked. Documentation should occur right from the start and at each stage of the process to ensure that learning can be captured for future application in subsequent steps or by others who wish to develop their own learning agendas. Although methods for documenting the process can vary, a few recommendations include:

- **Clarifying participants' roles** to facilitate deliberation and consensus-building among stakeholders, making each participant aware of their decision-making responsibilities, and at which point they should be involved.
- **Keeping a log of decisions that includes stakeholder inputs** and why certain decisions were made can help to communicate the justification for the learning content. A record of how a given group of stakeholders has reached consensus on a decision can also streamline the narrative used to describe and advocate for the learning agenda.
- **Documenting how particular themes and lines of inquiry were prioritized** and why they were judged to be useful by stakeholders can reinforce and communicate the value of the learning areas selected.