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FROM THE AMERICAN PEOPLE



LANDSCAPE ANALYSIS OF LEARNING AGENDAS: USAID/WASHINGTON AND BEYOND

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

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ACRONYMS

ADS	Automated Directives System
BFS	Bureau for Food Security
CBHSQ	Center for Behavioral Health Statistics and Quality
CLA	Collaborating, Learning, and Adapting
DCHA	Bureau for Democracy, Conflict, and Humanitarian Assistance
DFID	U.K. Department for International Development
DGP	Development Grants Program
DOL	U.S. Department of Labor
DRG	Center for Excellence on Democracy, Human Rights and Governance
E3	Bureau for Economic Growth, Education, and Environment
FAB	Office of Forestry and Biodiversity
FAS	Foreign Agricultural Service (U.S. Department of Agriculture)
GH	Bureau for Global Health
GIZ	German Agency for International Cooperation
HSS	Health System Strengthening
HUD	U.S. Department for Housing and Urban Development
LEARN	Learning and Knowledge Management project
LEO	Leveraging Economic Opportunities
LER	Office of Learning, Evaluation, and Research
M&E	monitoring and evaluation
MEL	monitoring, evaluation, and learning
MTE	Marshalling the Evidence
OHS	Office of Health Systems
OMB	Office of Management and Budget
PD&R	Office of Policy Development and Research
PPL	Bureau for Policy, Planning and Learning, USAID
SAMHSA	Substance Abuse and Mental Health Services Administration
SIDA	Swedish International Development Agency
STIP	science, technology, innovation, and partnerships
USDA	United States Department of Agriculture

FOREWORD

USAID, like many U.S. government agencies and development organizations around the world, is increasingly recognizing and supporting learning activities — often informed by a learning agenda — as important tools for improving organizational effectiveness and efficiency. A learning agenda comprises a set of broad questions directly related to the work that an agency conducts, which when answered, enable the agency to work more effectively and efficiently, particularly pertaining to evaluation, evidence, and decision-making.

Learning has always been a part of USAID’s work. USAID staff and implementing partners have always sought ways to better understand the development process and USAID’s contribution to it, to share successes and lessons, and to improve our way of working. We recognize that while learning is always taking place, it may not always be systematically planned or adequately resourced. And acting on new learning in ways that are strategic and maximize results can be difficult. Learning agendas can help overcome many of these challenges.

This report surveys the landscape of learning agendas at USAID/Washington and beyond to help us understand where and how the Agency is using learning agendas to guide its work, and how the Office of Learning, Evaluation, and Research (LER) in the Bureau for Policy, Planning and Learning (PPL) might best support or catalyze the efforts of others.

We hope the findings here will be useful to those who are beginning or continuing their own journey with learning agendas, as we all aim to multiply the impact of our investments and become an even more effective development organization.



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EXECUTIVE SUMMARY

U.S. government agencies and development organizations around the world are increasingly recognizing and supporting learning activities—often informed by a learning agenda—as important tools for improving organizational effectiveness and efficiency. A learning agenda comprises a set of broad questions directly related to the work that an agency conducts; when answered, they enable the agency to work more effectively and efficiently, particularly pertaining to evaluation, evidence, and decision-making. This report surveys the landscape of learning agendas at USAID and beyond to inform the learning agenda initiative planned by the Office of Learning, Evaluation, and Research (LER) in the Bureau for Policy, Planning and Learning (PPL).

Reporting on research conducted over a 6-month period (September 2016 to February 2017), this landscape analysis focuses on six documented, office-, bureau-, or initiative-wide learning agendas being used at USAID/Washington. It also considers 11 new or noteworthy learning initiatives at USAID and five learning efforts at other federal agencies. The research team interviewed 60 staff from 20 USAID offices and bureaus, as well as staff from five other federal agencies. (See Annexes I through IV for more information.) The team also convened two focus groups: one with staff in USAID/Washington who had recently returned from serving in Missions, and one with PPL staff who discussed that bureau’s learning activities. The report details the interviewees’ remarks on six topics:

- Motivations behind their decisions to pursue a learning agenda, such as expectations of accountability, especially in response to leadership demands
- The key benefits emerging from their learning agenda efforts, which have included identifying gaps in knowledge and evidence, and supporting other cultural and organizational change processes
- The participatory and consultative strategies they used to engage with stakeholders, including engagement with Mission staff and inclusion of academics and outside experts
- The learning activities and products related to their initiatives
- Challenges and strategies on resources, dissemination, and utilization, including ways to update their learning agenda to ensure that it remains a “living document”
- Recommendations they had for PPL and others considering embarking on a learning agenda initiative

Landscape Analysis Process

Although there were differences in design, purpose, and process across the learning agendas, interviewees followed most of the five steps below, which were adapted from the Office of Management and Budget’s (OMB) influential document, “Implementing a Learning Agenda Approach.”

1. Collaborate with important stakeholders to decide on the formulation process, and then to identify and prioritize the questions that need to be answered.
2. Develop a plan for how to answer the questions using the most appropriate tools and methods.
3. Implement appropriate qualitative and quantitative academic and practitioner research, evaluations, and other data-gathering activities.
4. Involve key stakeholders along the way.
5. Adapt programs and act on the results of what is learned by disseminating findings for program improvement.

The report concludes by noting that there is great interest in and momentum toward the use of learning agendas within USAID/Washington and the federal government, and that there continues to be varied and nuanced language around learning agendas. Interviewees noted three overarching considerations when formulating, implementing, and disseminating learning agenda findings:

1. Where possible, create linkages to strategic objectives or goals during formulation.
2. Leadership support and adequate resources are critical.
3. The process of formulating and implementing learning agendas often has benefits beyond just the generation of knowledge and evidence.

Interviewees also stressed the importance of collaborative processes throughout the learning agenda process, as well as that focusing on knowledge use to inform decisions increased the relevance and application of new learning. Last, the interviews revealed that learning agenda efforts often focused on multiple sources of knowledge, such as experiential learning.

I. LEARNING ABOUT LEARNING AGENDAS

Businesses and government agencies have long recognized the importance of organizational learning.¹ But what does effective organizational learning look like in a large government agency such as USAID? PPL recently provided guidance in this area by revising its operational policy for the Program Cycle, [Automated Directives System \(ADS\) 201](#). The four Program Cycle principles include:

- Apply Analytic Rigor to Support Evidence-Based Decision-Making
- Manage Adaptively through Continuous Learning
- Promote Sustainability through Local Ownership
- Utilize a Range of Approaches to Achieve Results

A learning agenda can play an especially helpful role in aligning strategy and project design with these four principles.² [A document released by OMB](#)³ provides the following definition of a learning agenda:

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

A learning agenda can serve to identify and prioritize areas of learning that inform agency strategies and processes; guide research, evaluation, and learning efforts to fill knowledge gaps in prioritized areas; support adaptation and innovation through dissemination and application of new learning; and maximize results by fostering collaboration and evidence sharing around common learning needs and opportunities across the Agency and with external stakeholders.

As many offices, bureaus, Missions, and departments across USAID and other federal agencies have discovered, learning agendas can help staff make better decisions at the Country Development Cooperation Strategy, project, or activity levels by identifying and filling gaps in technical knowledge.⁴

Exhibit I on the next page further defines what a learning agenda is.

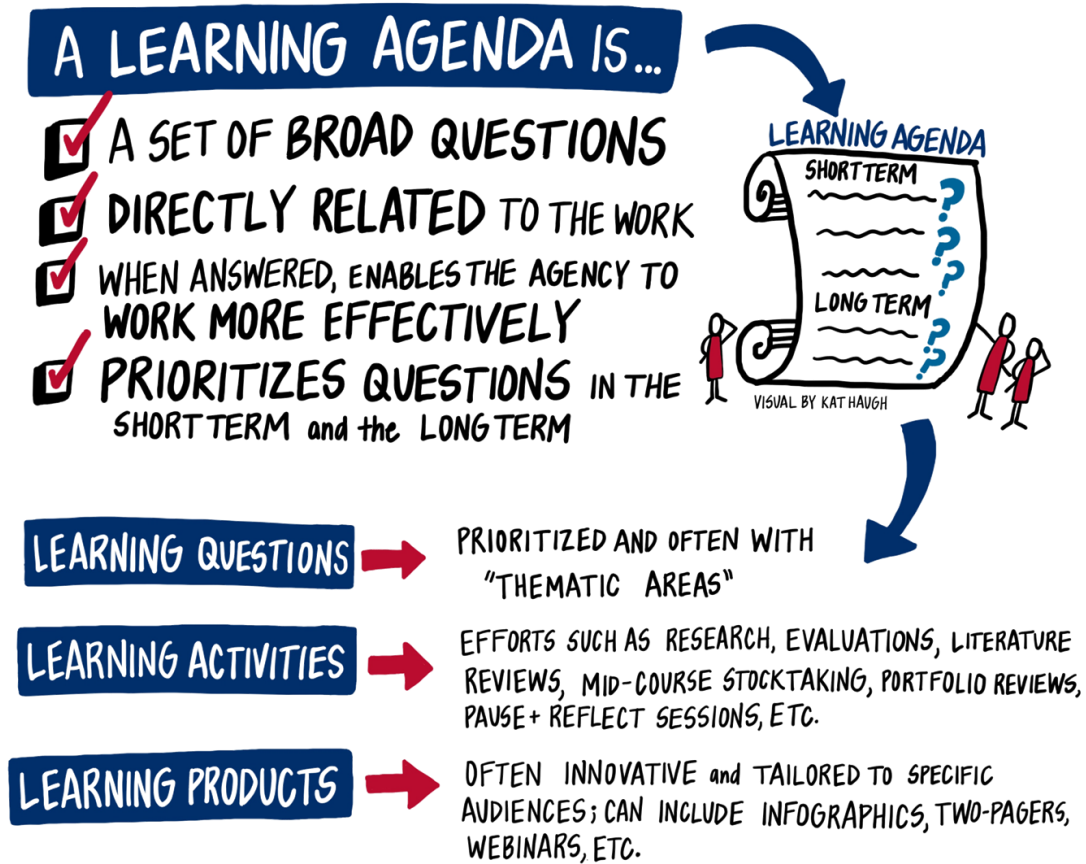
¹ See, for example, Peter M. Senge, *The Fifth Discipline: The Art & Practice of the Learning Organization*, New York: Currency Doubleday, 2006; David A. Garvin, "Building a Learning Organization," *Harvard Business Review*, July-August, 1993; and Max Visser and Kim Van der Togt, "Learning in Public Sector Organizations: A Theory of Action Approach," *Public Organization Review* 16(2), June 2016, pp. 235-249.

² For example, the new ADS 201 guidance includes mandatory guidance on learning plans for strategies, projects, and activities to ensure a more intentional approach to learning and adapting. Learning plans often include a learning agenda component, and often focus on explicitly linking findings to programmatic and operational needs.

³ Received via email from OMB on July 15, 2016, via FEDEVAL@listserv.gsa.gov and available for viewing on USAID's Learning Lab. See also the FY2017 budget document, "Building and Using Evidence to Produce Results": https://www.whitehouse.gov/sites/default/files/omb/budget/fy2017/assets/ap_7_evidence.pdf.

⁴ The multiplicity of potential applications is detailed in Annexes I, II, and III. See also "The Knowledge Cycle" box on page 3.

Exhibit I. Learning Agenda Definition



This landscape analysis provides an overview of learning agenda efforts throughout USAID and other federal agencies, with a focus on the operating units in USAID/Washington that have embarked on these important learning initiatives. An exploration of learning agendas in USAID Missions was beyond the scope of this analysis, but could be undertaken as a part of PPL's future learning agenda initiative.

II. BACKGROUND

In September 2016, LER began to explore the possibility of developing a learning agenda for PPL that would have Agency-wide implications. To inform its learning agenda effort, PPL worked with the [LEARN](#) contract to conduct a landscape analysis that maps out efforts to develop learning agendas at USAID and across other federal agencies. As a result of the landscape analysis, this report:

- Provides **descriptive summaries** and a **comparative analysis** of the **processes** used to create learning agendas at USAID and other federal agencies, and the **products** of those agendas, including documents and learning activities. (See Sections III and IV on pages 7 and 11, respectively, and Annexes I, II, III, and IV.)
- Discusses **emerging themes and learning** from efforts by USAID and other federal agencies to develop and implement learning agendas that generate, capture, share, and apply knowledge. (See Sections IV and V on pages 11-26.)

This landscape analysis emphasizes situating learning agendas within the overall knowledge cycle. Learning agendas should incorporate not just knowledge-generating activities (e.g., evaluations or research studies), but also include learning activities and products that facilitate knowledge dissemination and utilization throughout the Program Cycle (e.g., webinars, infographics, podcasts, working groups, or communities of practice). In this way, learning agendas can serve as key components of an approach that features collaborating, learning, and adapting (CLA) for the purposes of improving development outcomes. The box below explains the components of the knowledge cycle.⁵

The Knowledge Cycle

Knowledge generation refers to the creation of new knowledge from a variety of sources, including assessments, evaluations, reports, and staff or partner experience.

Knowledge capture refers to synthesizing, distilling, or packaging knowledge generated (or previously unnoticed internal knowledge) so that it can become shareable. Effective knowledge capture considers the intended audience and uses of knowledge to determine appropriate capture formats (e.g., multimedia, reports, and two-pagers).

Knowledge sharing refers to the dissemination of knowledge captured with appropriate audiences and in appropriate, user-friendly formats.

Knowledge application refers to using knowledge generated, captured, and shared to inform decision-making and action-planning.

A. LEARNING AGENDAS IN BROADER CONTEXT

U.S. government agencies and development organizations are increasingly recognizing and supporting the use of learning activities—often informed by a learning agenda—as important tools for improving

⁵ For more information on the knowledge cycle, please see Ribière, V. M., Román, J. A. (2008): Knowledge Flow; Jennex, M. E., Knowledge Management Concepts, Methodologies, Tools and Applications; Hershey: Information Science Reference, pp. 1086-1095; and Becerra-Fernandez, I., Gonzalez, A., and Sabherwal, R. (2004): Knowledge Management: Challenges, Solutions, and Technologies, Pearson Prentice-Hall, New Jersey.

organizational effectiveness and efficiency. (See Annexes IV, VIII, and IX for more information.) Examples of these new learning agenda initiatives beyond USAID include:

- Learning agendas at federal agencies, such as:
 - The Department of Housing and Urban Development’s (HUD) [Research Roadmap](#) initiative (FY 2014-2018) involves ongoing consultations with senior leadership, staff, and external stakeholders to guide, coordinate, and utilize research and learning across the department.
 - The U.S. Department of Labor’s (DOL) Chief Evaluation Office helps [institutionalize a culture of learning](#) by providing support and guidance for the learning agendas in its 17 operating agencies, and developing systematic processes for building bridges between analytic approaches and key staff in each agency.
 - In the Substance Abuse and Mental Health Services Administration, a branch of the U.S. Department of Health and Human Services, the Center for Behavioral Health Statistics and Quality started a learning agenda to better integrate its work in a curation process that systematically identified and prioritized statistical research and program evaluation priorities that reflected scientific merit, policy relevance, and effective use of staff and contract resources.
 - The Corporation for National and Community Service’s Office for Research and Evaluation developed a learning agenda, consulting throughout the organization to identify research gaps and prioritize new research studies.
 - The U.S. Department of Agriculture’s (USDA) Foreign Agricultural Service’s (FAS) Office of Capacity Building and Development created two learning agendas that identified gaps in the knowledge base of two USDA food security programs and generated relevant learning questions to address them.
- Most learning efforts by bilateral development donors have not adopted the term “learning agenda.”⁶ Instead, donors have focused on adjusting their overall philosophies about development, adopting approaches such as adaptive management and including learning as a separate or integrated concept to existing policies and procedures. This often also includes a focus on learning about these approaches, such as the recent Global Learning for Adaptive Management program⁷ or the Overseas Development Institute’s report “[From Political Economy Analysis to Doing Development Differently](#)” (2016). In addition, donors have been focused on amending their programmatic guidance to reflect the importance of learning in programs, as USAID did in its revised ADS guidance focusing on the importance of [CLA](#). A similar approach is reflected in the U.K. Department for International Development’s (DFID) [Smart Rules](#), which provide the operating framework for its programs, including the use of

⁶ One notable exception is the BEAM Exchange, which includes an explicit learning agenda. Managed by PricewaterhouseCoopers, it was launched in 2014 with initial 3-year funding from DFID and the Swiss Agency for Development and Cooperation. It brings experience and expertise across the fields of market systems development, M&E, knowledge management, and community building.

⁷ The Global Learning for Adaptive Management (GLAM) program will support adaptive management in DFID and USAID programming including establishing a center for learning about adaptive management.

evidence to inform decisions.⁸ Another example is the [Swedish International Development Cooperation Agency](#), which also integrates individual learning with its organizational goals to foster a learning culture. Last, by far the most common area of focus is including learning in evaluation policies and the use of evaluations for learning purposes, including organizational processes. (See Annex IX.)

- More and more international development organizations and foundations have developed learning agendas. Prominent examples include The United Nations Research Institute for Social Development’s 5-year [Research Strategy](#) (2016); The Bill & Melinda Gates Foundation-funded [Building a Learning Agenda Around Disconnected Youth](#) (Manpower Demonstration Research Corporation, 2010); the RISE Learning Network’s [Learning Projects](#) initiative (2015); and Youth Business International’s 3-year [Research and Learning Agenda](#) (2014).
- Although many companies have prioritized creating a learning organization and businesses have frequently used the term “learning agenda” in the context of individual development,⁹ learning agendas remain relatively underutilized in the private sector. These organizations use other [terms](#), such as “Chief Executive Officer agenda,” in which learning occurs around the implementation of strategic goals and performance metrics. One example of “learning agenda” appears in corporate social responsibility initiatives such as an [Accenture learning agenda](#) for its Skills to Succeed project. (See Annex VIII.)

Called by many names, these and other strategic learning agenda approaches are recent initiatives that respond to a growing recognition that learning and evidence-based decision-making are critical for improving organizational and programmatic effectiveness.

B. METHODOLOGY FOR THE LANDSCAPE ANALYSIS

Conducted from September 2016 to February 2017, the research for this landscape analysis focused on **documented, office-, bureau-, or initiative-wide learning agendas** that were being **used at USAID/Washington to inform programming**. Additionally, this report summarizes the initiatives of five other federal agencies that have formulated learning agendas, and touches on some new and noteworthy learning agenda initiatives within USAID.¹⁰

The research team interviewed 60 staff in 20 USAID offices and bureaus, and five other federal agencies, about their learning agenda efforts. Interviewee selection was based on snowball sampling and responses to an Agency-wide email request sent by PPL for information about learning agendas.¹¹ Data was collected in two rounds: The first round collected data to inform a preliminary report and the second round collected data for the final report, including follow-up interviews with previous interviewees,

⁸ Notably, many of these learning initiatives involve collaborative efforts between international development donors.

⁹ For perhaps the earliest published example of the use of “learning agenda,” see William R. Dill, Wallace B.S. Crowston, and Edwin J. Elton, “Strategies for Self-Education,” *Harvard Business Review*, November-December 1965, pp.55-66.

¹⁰ As noted earlier, a comprehensive exploration of learning agendas in USAID Missions was beyond the scope of this landscape analysis.

¹¹ Although the research team cast as wide a net as possible and used different strategies to solicit participation from anyone with a documented or incipient learning agenda in USAID/Washington, it is possible that relevant efforts have been overlooked. PPL welcomes the chance to speak with individuals from any learning agenda initiatives that are not included in this report.

validation of content produced for the preliminary report, and additional interviews with new interviewees from USAID and the five federal agencies. Three sets of questions were tailored to specific audiences. Annex V contains the lists of questions used for different groups of interviewees; the box on the right of this page shows the questions that guided this analysis.

From these inquiries, the research team identified six full-fledged, documented learning agendas and 11 more incipient learning agenda efforts at USAID. Individuals involved in these initiatives, as well as staff members at five other federal agencies who had implemented their own learning agendas, were interviewed.¹² Interviews were semi-structured and focused on *descriptive questions* about the development process and content of the learning agenda, and *reflective questions* about what worked well, challenges and lessons, promising practices, and recommendations for others interested in developing learning agendas.¹³

Questions Guiding the Landscape Analysis

- Which USAID/Washington bureaus and offices have developed learning agendas?
- How did they develop their learning agendas? What was needed in terms of time and resources?
- How are these learning agendas being implemented, and how is evidence being generated and utilized?
- What are the key learning questions/themes and activities for each agenda?
- What do interviewees recommend for offices interested in formulating their own learning agendas?
- How would interviewees recommend that PPL proceed with regard to a PPL learning agenda?

The research team also convened two focus groups, one with PPL staff who discussed the bureau's learning activities, and one with staff at USAID/Washington who had recently returned from serving in Missions. This latter group provided insights into how Mission staff might react to and/or employ learning agendas in the field, especially as part of required Program Cycle components, such as the CLA Plan, project-level monitoring, evaluation, and learning (MEL) Plans, or activity-level MEL Plans. Conducting a more systematic analysis of Mission learning agendas was beyond the scope of this analysis but could be a valuable initiative to pursue in the future.

One interviewer and one note-taker attended the interviews and focus group discussions. The note-taker captured summary notes that were used for analytical purposes. The research team synthesized the notes and learning agenda documents using software that facilitated content and thematic analysis, and created two-page descriptive summary tables for each of the six documented learning agendas; these are available in Annexes I and II.¹⁴ Annexes III and IV contain descriptive summary tables of the learning agendas of the other federal agencies, as well as paragraphs about the additional 11 USAID learning agendas currently under development.

¹² See Annex V for a list of interviewees.

¹³ See Annex VI for the interview questions.

¹⁴ PPL used the NVivo qualitative software program to store and conduct analysis.

III. OVERVIEW OF LEARNING AGENDAS AT USAID

This section details the six documented learning agendas that met all the criteria for inclusion. It also presents the 11 new and noteworthy learning agendas (nine not documented, one excluded because it was activity-based, and one awaiting approval).

A. DOCUMENTED LEARNING AGENDAS

Based on OMB's definition of learning agendas, three criteria were used to define the category of agendas for this analysis:

- The learning agenda is **office-wide or bureau-wide**. There are also cases where the agenda is cross-office or cross-bureau, as with certain initiatives or programs.
- The agenda is **documented**.
- The agenda **is used to inform programming** or strategic approach.

Furthermore, these learning agendas shared other key features, including:

- **Learning questions** (prioritized and often categorized within thematic areas)
- **Learning activities** (e.g., research, evaluations, literature reviews, mid-course stocktaking, portfolio reviews, pause and reflect sessions)
- **Learning products** (often innovative and tailored to specific audiences; can include infographics, two-pagers, webinars, podcasts, and other media)

The six learning initiatives that met these criteria were:

1. **Bureau for Democracy, Conflict, and Humanitarian Assistance/Center of Excellence on Democracy, Human Rights, and Governance (DCHA/DRG):** DRG has one of the most fully developed office-wide learning agendas at USAID, with high-quality documentation, extensive learning activities and products, and integrated mechanisms that promote ongoing collaboration. Following a recent update that generated a learning agenda for 2017, current efforts focus on conducting learning activities, “sharing back” with staff, and disseminating findings.
2. **Bureau for Economic Growth, Education, and Environment/Office of Forestry and Biodiversity (E3/FAB):** FAB has developed a highly collaborative, cross-Mission learning agenda on conservation enterprises under its 5-year Measuring Impact contract that leverages relevant evidence and experience in different country contexts to improve project design, implementation, and impact. Its learning agenda efforts have had a strong, diverse stakeholder representation and high response rates from the field. FAB recently developed a second learning agenda focused on combating wildlife trafficking and has launched a Combating Wildlife Trafficking Learning Group.
3. **Bureau for Food Security (BFS)/Feed the Future:** Feed the Future's inter-agency learning agenda effort was led by USAID and the Millennium Challenge Corporation. Its purpose was to better understand which interventions have the greatest impact in a given context, which are most cost-effective, and what combination and/or sequence of interventions/investments have the greatest impact on the objectives of improving agricultural growth, reducing poverty, and reducing

malnutrition. BFS, working with inter-agency partners, is developing a revised Feed the Future learning agenda that will build on important lessons from the original. This will include expanding learning activities and knowledge sources beyond impact evaluation and integrating mechanisms to ensure that the learning agenda is a “living process,” adapted along the way to reflect new evidence and changing contexts.

4. **Bureau for Global Health/Office of Health Systems Strengthening (GH/HSS):** The Marshalling the Evidence (MTE) initiative establishes a learning agenda across technical areas for HSS within the GH’s Office of Health Systems (OHS). Further learning agenda efforts will aim to improve evidence gathering, dissemination, and feedback loops across GH offices and with Missions.
5. **Local Solutions (PPL):** PPL has a learning agenda for Local Solutions that emerged out of U.S. Government Accountability Office audit recommendations for improved accountability, rather than self-identified learning needs. The top-down, externally catalyzed learning agenda approach initially shaped the focus of agenda questions; however, staff have developed an internally driven, participatory process for conducting learning activities that has reshaped the initiative to include many of Local Solution’s core values and learning.
6. **Development Grants Program (DGP):** The 2012-13 learning agenda for Local Capacity Development emerged from an evaluation of the DGP, and became instrumental in establishing *localworks* (housed in USAID’s Local Sustainability Office in E3). With learning questions grounded in USAID Forward reform principles, independent evaluation consultants conducted extensive learning activities. Although it is no longer active, this learning agenda developed a wide array of learning products that received Congressional attention and support.

Annex I contains more details about the unique development processes and content areas of these learning agendas, including a summary charts with links to key materials. Exhibit 2 (p. 10) shows the documented and new/noteworthy learning agendas at USAID/Washington. For definitions on the knowledge cycle, see the box on page 3.

B. OTHER NEW OR NOTEWORTHY LEARNING AGENDA EFFORTS

The research team collected data on 11 other learning agenda development efforts that did not meet the criteria for fully documented agendas. Nine of these are in the early stages and not yet documented. Of the remaining two, E3’s Leveraging Economic Opportunities (LEO) is completed but is activity-based, not an office- or bureau-level learning agenda, and the Bureau for Latin America and the Caribbean’s learning agenda document is pending necessary clearance and approvals prior to distribution.

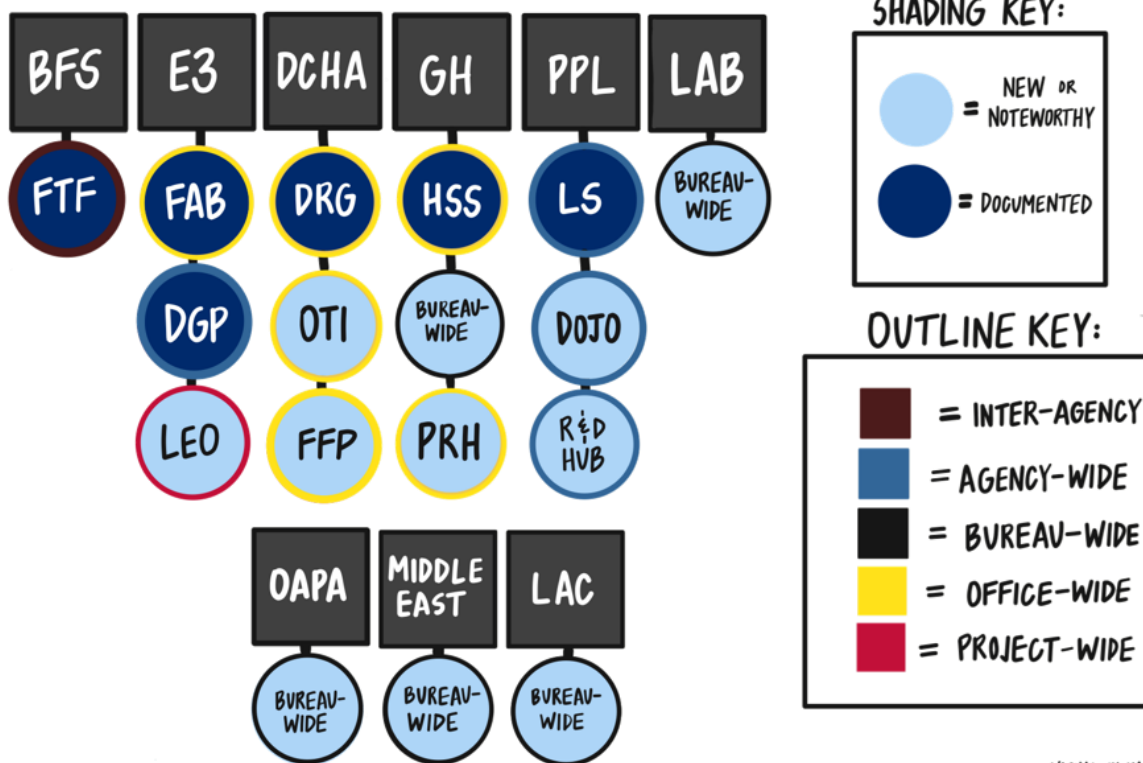
The efforts initiated by pillar or regional bureau operating units are also depicted in Exhibit 2. Summaries for these agendas are in Annex III.

1. **Bureau of Global Health:** Current efforts to develop GH’s bureau-wide, 5-year Research Strategy may create opportunities to develop research or learning agendas that fit within the strategy’s broad framework.
2. **Office of Afghanistan and Pakistan Affairs:** This office is in the very early stages of compiling/analyzing its research and evaluation projects to identify overarching learning questions.

3. **GH/Office of Population and Reproductive Health:** An initiative to develop a research agenda is a preliminary step in creating a broader learning agenda.
4. **U.S. Global Development Lab:** An ongoing effort builds on two-and-a-half years of coordinated learning activities. The Lab is relatively close to finalizing learning agenda materials.
5. **E3/LEO:** The learning agenda for this 3-year USAID-funded and completed contract was recently finished under an agreement with an implementing partner.
6. **Office of Transitional Initiatives:** Efforts are focused on assessing the utility and appropriateness of developing a learning agenda.
7. **Food for Peace:** The development of a learning agenda is a strategic goal identified in the office's 2016-2025 Food Assistance and Food Security Strategy, and is currently under development.
8. **Bureau for the Middle East:** Consultative efforts are focused on exploring the development of a learning agenda.
9. **Bureau for Latin America and the Caribbean:** Following an extensive consultative process with technical teams and Missions, a formal learning agenda will likely be available soon.¹⁵
10. **The R&D Hub for M&E:** This is a PPL/LER initiative that is working with a variety of partners to understand emerging M&E approaches across USAID.
11. **Partners for Learning (aka Learning Dojo):** Facilitated by LEARN and PPL, this group brings together operating units with learning agendas to develop and implement its own shared learning agenda on CLA and other crosscutting approaches.

¹⁵ Due to timing considerations during the second round of data collection, the team was unable to interview representatives from the Bureau for Latin America and the Caribbean. This information was gleaned from secondary sources.

THE LANDSCAPE OF LEARNING AGENDAS



VISUAL BY KAT HAUGH

IV. INSIGHTS AND EXPERIENCES OF INTERVIEWEES

The research team analyzed information from 60 USAID staff whose experiences participating in or leading learning agenda initiatives provided many valuable perspectives and insights on the methods, processes, benefits, and challenges of their efforts. Although there were differences in design, purpose, and process across the agendas, most interviewees followed (even if unknowingly) some version of the approach shown in Exhibit 3 on the next page. This approach, which is adapted from the steps laid out on page 2 of OMB’s influential document, “[Implementing a Learning Agenda Approach](#),” includes five distinct steps:

“Evidence was the Achilles heel.”

— USAID, Documented learning agenda interviewee

1. **Collaborate with important stakeholders to decide on the formulation process, and then to identify and prioritize the questions** that need to be answered to improve program effectiveness, build evidence, and make strategic decisions about the key questions that will help the Agency the most
2. **Develop a plan for how to answer the questions** using the most appropriate tools and methods
3. **Implement academic and practitioner research, evaluations, and other data-gathering activities** based on the strongest and most appropriate qualitative and quantitative methods
4. **Involve key stakeholders** along the way
5. **Adapt programs and act on the results** of what is learned by disseminating findings for program improvement

To attain a more detailed picture of the process, contents, and products of the learning agendas, interviewees were asked about these subjects:

- Motivations behind their decisions to pursue a learning agenda, such as expectations of accountability, especially in response to leadership demands
- The key benefits emerging from their learning agenda efforts, which included identifying gaps in knowledge and evidence, and supporting other cultural and organizational change processes
- The participatory and consultative strategies they used to engage with stakeholders
- The learning activities and products related to their initiatives
- Plans to update their learning agenda to ensure that it remains a “living document”
- Challenges and strategies surrounding timing, staffing, and resources
- Recommendations for others considering embarking on a learning agenda initiative

Exhibit 3. Steps in the Learning Agenda Process

LEARNING AGENDA JOURNEY

—THE ROAD MOST FREQUENTLY TRAVELLED—



VISUAL BY KAT HAUGH

A. PRIMARY MOTIVATIONS FOR LEARNING AGENDAS¹⁶

Interviewees cited three primary motivations for the creation of learning agendas:

1. Expectations of accountability, especially in response to leadership demands
2. Leadership transitions and structural, strategic, or policy changes
3. Responses to identified program-related needs

Many learning agenda points of contact often remarked on more than one motive as the rationale for the agenda, suggesting that a confluence of factors may often be required for the successful launch of an initiative. The fact that motivations were often multifaceted could indicate that a variety of rationales were useful in justifying and framing the agenda efforts for multiple audiences during development and implementation.

“The most important thing is what can we learn from what we’ve done so far? Some of what we’ve done is not new ... but we don’t have a repository for findings and learnings.”

— USAID, New/
Noteworthy learning
agenda interviewee

First, among the documented learning agendas, accountability was a clear inspiration for agendas, such as the ones at DGP and Local Solutions. Stakeholders often leveraged accountability initiatives, such as audits, to elicit learning opportunities related to programming. Learning agendas also tended to be developed in the context of other changes, such as transitions in leadership or the recognition that certain needs were not being addressed. Second, the role of leadership in driving or inspiring the development of a learning agenda was a common refrain. This linked to the importance that interviewees placed on leadership as a key catalyst in supporting their efforts. In addition, some interviewees noted that the involvement of leadership increased the level of transparency and accountability around the learning agenda, raising its prominence and elevating its importance as a priority. Leadership transitions were also often tied to other structural, strategic, or policy changes, such as changes in an office’s role or the creation of broader strategy. Third, a “learning need” to address was often identified. The identification of learning needs, while often occurring in conjunction with leadership and accountability motivations, was also a result of proactive efforts to inform upcoming work or address previously identified challenges related to a lack of evidence.

Accountability, leadership-related factors, and learning needs were also the most commonly cited motivations for the development of a learning agenda from the other federal agencies interviewed. Often, the linkages between motivations, particularly accountability, suggest that there remain opportunities to integrate learning agendas with other ongoing or required initiatives. This connects to a recommendation from interviewees to link to existing learning efforts and could also address a commonly cited challenge of ensuring adequate resources are available for the learning agenda.

After review of the documented learning agenda documents, two broad categories are identifiable. The first tended to focus on providing an evidence base for a general area or sectoral theory of change (e.g., GH/HSS, E3/FAB, Local Solutions, and DGP); the second tended to focus on providing an evidence base

¹⁶ The analysis in this section was conducted using NVivo. Quotations cited here draw on interview notes taken during the data collection process. Some have been edited for clarity.

for specific interventions or theories of change (e.g., BFS/Feed the Future and DCHA/DRG.) Notably, most interviewees did not articulate their learning agenda in such terms, suggesting that the language used to describe agendas is generally more likely to be expressed in less explicit terms or language drawn from M&E. The communication of initiatives such as learning agendas in vernacular terms that are appropriate to the audience in question is therefore likely an unarticulated strategy to ensure engagement from relevant audiences.

“People know that evidence is out there. They often just didn’t have the time to sift through it.”

— USAID, Documented learning agenda interviewee

B. KEY LEARNING AGENDA BENEFITS

Interviewees emphasized the benefits of learning agendas in two primary areas. First, learning agendas made it easier to systematically identify gaps in knowledge and evidence in a structured way. This had the related benefit of synthesizing relevant evidence and applying it to the most pressing learning questions, increasing the efficiency and productivity of potential users of this information. Learning agendas were viewed as potential tools to address challenges such as too much data or disparate data sources that made utilization difficult. Second, interviewees recognized that learning agendas are supportive of other cultural and organizational change processes in organizations. Agendas were often framed as providing opportunities to model behavior favorable to learning and providing a focus to direct efforts around using evidence in decision-making. While many interviewees noted the challenge of dissemination, they also said that the very process of formulating an agenda often catalyzed valuable conversations with colleagues about learning and the use of evidence in decision-making.

“The consultative process has been really important. If we had just pushed forward with a D.C.-centric process, it might not have been as useful as it will be now.”

— USAID, New/Noteworthy learning agenda interviewee

C. ENGAGEMENT STRATEGIES

Developing a learning agenda begins with identifying and gathering stakeholders to inform the process. The most commonly cited modes of engagement were in-person meetings and virtual meetings or webinars (e.g., conferences or summits, workshops, and individual meetings or consultations). Two general findings emerged regarding how to engage with individuals within and outside USAID: make the process participatory and engage external stakeholders, such as academics and outside experts. Often, the same means of communications were used for convening stakeholders to formulate the learning agenda and sharing findings produced from the agenda.

The first finding pertained to the overall levels of engagement that the process required for developing, implementing, and disseminating the learning agenda. The terms “participatory” and “consultative” were often cited by interviewees in their processes, though the precise meaning of these terms differed across learning agenda efforts, as they referred to varying levels of intensity and different points of engagement in the formulation and implementation of the agenda. The level of engagement was often limited by the resources available for the agenda in areas such as staffing and time allocation. In other cases, creative solutions to implementing the agenda allowed individuals to circumvent these constraints.

For example, the Local Solutions team creatively collaborated with volunteers to support their learning activities by calling on people across USAID to review evaluations related to local ownership.

Notably, leadership was the stakeholder mentioned most often—their involvement in the learning agenda and role in encouraging the engagement of others. There were also varying levels of Mission involvement cited, from soliciting ideas in webinars to more traditional solicitation of feedback through email. Challenges in communication between USAID/Washington and the field or a desire not to duplicate the Missions’ own learning agenda efforts were mentioned as reasons for limited engagement. Because all the documented learning agendas reviewed were from USAID/Washington, engaging with Missions was often cited as a challenge. Still, some learning agendas, due to their focus, integrated Missions more directly. For example, one agenda incentivized participation by setting aside funds for Mission-driven evaluations in line with the agenda questions. Interviewees noted that Mission staff are often not aware of USAID/Washington learning initiatives, making communication even more critical in any learning agenda that would involve them. Interviewees stressed that consistent, regular communication on topics related to the formulation, implementation, and dissemination of learning agenda findings was vital for engaging Mission staff. Table I shows a few of the ways documented learning agenda efforts sought engagement; it is not an exhaustive list.

“The process was an elicitive one. They felt ownership because it’s a dialogue.”
 — USAID, Documented learning agenda interviewee

TABLE I. ILLUSTRATIVE ENGAGEMENT WITH STAKEHOLDERS ON LEARNING AGENDAS¹⁷

TYPE OF ENGAGEMENT	DEFINITION AS IT RELATED TO LEARNING AGENDA	ILLUSTRATIVE EXAMPLE
Inform	Provide stakeholders with objective information on learning agenda	GH/HSS prepared and disseminated MTE products, including an HSS finance policy paper for Congress and evidence summaries for use in the field.
Consult	Seek feedback from stakeholders at a certain time to inform decision-making	BFS/Feed the Future vetted and refined its learning questions by convening meetings of researchers and evaluators, civil society representatives and USAID experts.
Participate/Involve	Seek systematic ways to integrate feedback into decision-making processes	DCHA/DRG convened “Theme Teams” around specific topics and utilized them in the development and refinement of learning questions, and subsequently shared findings with the teams.
Collaborate	Seek active ownership over the learning agenda formulation and implementation	Local Solutions sought USAID staff to assist with its review of relevant USAID evaluations related to local partnerships, capacity, ownership, and sustainability.

¹⁷ Typology adopted from engagement types used by the International Association for Public Participation spectrum.

The second finding related to engagement was the inclusion of external stakeholders in the development of their learning agendas. While it appears that most agendas engaged audiences outside USAID, the types of audiences and level of engagement differed. These differences related to the various ways that external expertise and insight could be brought to bear on refining or answering learning questions. In some cases, engagement with local stakeholders was critical due to the nature of the questions (e.g., the DGP learning agenda). Academics were mentioned the most, but learning agendas often consulted other federal agencies, multilateral agencies, and implementing partners. External actors were also often convened through a specific advisory or working group (e.g., BFS/Feed the Future and DGP efforts).

The federal agencies interviewed also used participatory mechanisms to convene staff. Because of the nature of their work, some agencies also had mechanisms to more fully integrate external stakeholders into the development process. For example, HUD developed a comprehensive strategy for engagement through a series of listening sessions that gathered comments from 950 stakeholders, including other relevant federal agencies, non-federal partners, HUD staff, community-based organizations, implementing partners, and its own unit staff members. These comments were then analyzed and categorized by the type and content of the feedback. Similarly, USDA's FAS garnered feedback through workshops, webinars, and correspondence. In both cases, external outreach followed a period of internal deliberation on learning questions, research areas, or topics to inform these dialogues. In addition, the federal agencies typically involved other federal agencies and implementing partners that had relevant stakes in their work. This participation was sometimes formal, such as technical working groups at DOL to support evaluative projects; other times, the outreach was more informal.

D. LEARNING AGENDA ACTIVITIES

Learning activities and the creation of products based on the research or evidence generated are critical components of any learning agenda. Learning activities are used to answer the specific learning questions in the agenda. Analysis of the documented agendas revealed that learning activities usually fell into three main categories, in decreasing order of usage:

1. **Research-based activities.** This is where most of the activities tended to cluster. Most utilized formal qualitative and quantitative research methods and were conducted by academics and evaluation specialists. There was heavy use of evaluations, assessments, and literature reviews.
2. **Practice-based activities.** Some efforts featured the sharing of expertise and experience to determine best practices and learning. Sessions such as experience summits were often used to share learning and knowledge. There appears to be an overlap between this approach and the creation or use of groups to support learning through "Theme Teams" or learning networks that may also share experiential knowledge, although this may not have been their primary function.
3. **Policy/operational-focused activities.** Only HSS's learning agenda explicitly employed activities focused on shaping operations or policy-based areas. It appears likely, however, that the evidence generated from other learning agendas may have played a role in shaping and informing policy and operational decision-making, even though this was not an explicit, separate activity in the agenda.

E. LEARNING AGENDA PRODUCTS

One of the principal products for a learning agenda is the formal document that describes the questions and, usually, articulates the plan or strategy to answer them. PPL analyzed 12 documents related to the six documented learning agendas to identify patterns in how they were structured. All but one (DCHA/DRG) had a narrative report associated with the agenda. Notably, the number of learning questions ranged from 2 to 29, with an average of 9 and a median of 4. (See Annex VII.) This disparity can be explained by the varying levels at which questions were posed—from broad to relatively discrete, depending on the purpose of the learning agenda. For example, DGP was more interested in looking at the ways USAID did programming with local partners as a whole, while BFS/Feed the Future’s questions focused on the outcomes of specific interventions related to specific agricultural processes. In the two cases that had learning agendas with more than five questions, additional categories were used to delineate between questions.

Analysis of the documented learning agendas revealed two general question foci, a set of similarities related to the agenda outline, two themes on language used in questions, and two themes on the structure of questions.

The formal learning agenda documents often followed a similar outline by providing a general background to the process, including the objective or goal for the agenda. Following this, any overriding considerations that informed the agenda (e.g., strategic frameworks or results chains) were detailed. Most documents also had a methodological section describing the process, stakeholders, and feedback from participants. Documents then listed the learning questions; for agendas with more questions, they were sometimes subdivided into categories within larger themes. Documents varied in the level of detail related to learning questions, but agendas did include other details such as the learning activities, products, and the use or value of the products. If the document also described ongoing activities, the status was sometimes included to provide an update on current progress.¹⁸

Two distinct themes emerged on the language used in the learning agenda questions. The first pertained to language used to articulate the main idea of the question. This included a focus on “interventions” or “investments,” as well as terms such as “factors,” “approaches,” “strategies,” and “characteristics,” or ways to conduct programming. Some conjoined these areas to make for discrete, detailed questions. Second, some questions explicitly focused on reviewing specific topics, such as evaluations, academic/gray literature, outcomes, or habits.

In addition, the structure of learning questions within the documented learning agendas tended to focus on two major areas. The first, more common, area focused on either changes or impact, and most were associated with positive connotations of change such as “bolster,” “encourage,” “influence,” “promote,”

Learning products noted in the interviews and documents reviewed by the team included:

- Printed matter such as policy papers, practitioner guidelines, infographics, network analyses, checklists, directories of resources, annotated bibliographies, and research reports
- Online and multimedia resources such as websites, wikis, group emails, short video posts, webinars, virtual peer assists, cartoon strips, and videos
- In-person events, including presentations, study tours, experience summits

¹⁸ Similarly, DOL employs a division between completed and ongoing research studies related to its learning agendas.

or “strengthen.” The second area revolved around looking at specific causal links, and it was common for the questions to investigate linkages, including the use of phrases such as “affect” and “lead to.” While both ways of structuring the questions are closely related, the second did imply a higher standard of proof; however, this was not explicitly investigated with interviewees. This distinction likely does bear a linkage to understanding how the evidence created may be understood and applied. It should also be noted that the majority of the causal-type questions were concentrated in the BFS/Feed the Future learning agenda. Analysis showed wording focused on “what,” “how,” “does,” and “have.” However, there was less emphasis on questions related to location or timing of processes. This raises a question related to the ability to draw generalizable conclusions from findings to inform decision-making.

Furthermore, following the implementation of the learning agenda, there are often a variety of products created to share and communicate evidence and findings. Interviewees focused less on defining the type of products and more on how findings generated through learning agendas are utilized. Often, individuals attempted to understand how findings were being absorbed by analyzing their dissemination. Learning products fell into three major categories; in order of mentions, they were printed material such as policy papers, practitioner guidelines, infographics, publications, and research reports; online and multimedia resources such as interactive platforms or websites; and in-person events such as experience summits and learning groups. Some efforts, such as GH/HSS’s, included more work-ready tools/resources such as checklists, which are designed to be used as benchmarking tools that are well-integrated into daily routines, but these tended to be the exception and not the rule. This was often due to the stage of the process that many learning agendas were in, with utilization and application often only in their nascent stages. Furthermore, evidence to inform the best ways and means to disseminate learning appeared to be lacking, inhibiting larger investments in terms of time to disseminate information. Interviewees articulated an acute awareness of this and suggested several strategies to better address dissemination and utilization.

“What type of communication really speaks to people the most? Format is really important. We don’t have a perfect handle on that.”

— USAID, Documented learning agenda interviewee

F. COMMON CONSTRAINTS AND UNCOMMON STRATEGIES: TIME, STAFFING, AND RESOURCES

Often, the types of engagement utilized, the activities pursued, and the products developed related to the level of resources, time, and staffing available for the learning agenda effort. Interviewees tended to attribute certain weaknesses of their agendas to lack of staffing or other resources. For example, a link was drawn between these constraints and being unable to engage certain stakeholders, such as Mission staff. Interviewees referenced the need for support with engagement mechanisms involving either USAID or external audiences. Building off existing resources, aligning learning activities with ongoing activities, and using volunteers to support implementation of learning activities were some of the successful strategies employed by learning agenda points of contact.

Despite the challenges involved in quantifying the level of effort and resources needed to produce a successful learning agenda, interviewees indicated that it took, on average, 5-8 months for the development of their formal agendas. Typically, if an agenda was revised, the process was more truncated due to informal learning that occurred during the initial development process. Implementation

of learning activities and their subsequent dissemination often took place over a longer period. This likely reflects the fact that learning agendas' activities and products can be affected by procurement delays, and involve utilizing existing resources or opportunities that have their own timelines. Interviewees often struggled to calculate the resources, including time, spent on the learning agenda, as opposed to other learning-related activities, suggesting there are areas of overlap and opportunities for synergy during development and implementation.

Understanding the timing involved in creating learning agendas can be complicated by the often-lengthy period for gestation. The impetus for creating an agenda is often disconnected in time from the beginning of its development and implementation of the learning process. Across the six documented learning agendas surveyed in USAID, the release of a formal report detailing the agenda often happened about 1 year after the formal process had begun, likely reflecting the need for approvals for drafting and finalizing the report. This also suggests that, to understand the utility of learning agendas, it is necessary to focus on the process as well as the final formal document that details the agenda. For a more detailed discussion of the agenda formal documents, see Subsection E, "Learning Agenda Products," on page 17.

"Dissemination is key, but it takes a lot of work."

— USAID, Documented learning agenda interviewee

While the staffing and the level of effort associated with learning agendas differed, there appear to be some commonalities in terms of organizational structures employed to facilitate the process. First, there would often be a core team involved in creating, facilitating, and "owning" the process. Core teams would often consist of two to four people, and their level of effort fluctuated during the process, with periods of full dedication to the process alternating with periods devoted to other tasks. Facilitation of the learning agenda was generally estimated to involve from 25-50 percent of an individual's time.¹⁹ The core team was often supplemented with support from other team members, volunteers, or interns at various junctures, depending on the exact needs dictated by the learning agenda. Implementation of the agenda often depended on the requisite learning activities, with two major methods for implementation: by staff or contracted to third-parties. Activities conducted by staff ordinarily had the core team facilitating the process. The core team would also facilitate the contracting process with third parties.

G. CHALLENGES & OPPORTUNITIES FOR DISSEMINATION, USAGE, AND APPLICATION

Interviewees across USAID and federal agencies recognized the importance of disseminating and applying evidence created through learning agendas. For instance, a variety of communication methods were employed during formulation, implementation, and dissemination, including email correspondence, surveys, briefs, handouts, webinars, and website-related platforms. Limited references were made to using social media, blogs, bibliographies, brochures, and visualizations for communication purposes. While many interviewees recognized the value of data visualization to increase the accessibility of information emanating from agendas, examples of use were less common. Two examples of data visualization were infographics and story maps.

¹⁹ Many interviewees understandably struggled with providing accurate estimates related to timing and level of effort. Chronicling more precisely the process of developing and implementing a learning agenda on these two fronts could generate useful information for those engaged in designing and facilitating other learning agenda efforts in the future.

Many interviewees noted that understanding how to use evidence generated from the learning agenda continues to be a work in progress; more research is needed to understand the best ways, means, and entry points to ensure maximal usage and impact. Many points of contact track dissemination processes and methods by, for example, looking at the number of presentations, attendees, downloads, or page views related to a product. In addition, interviewees noted that dissemination processes for Mission staff might need to be tailored to their needs. For example, interviewees who recently returned from Missions said they used ProgramNet to gather necessary information when conducting their day-to-day work, but also cited personal relationships as important.

“It’s more useful to make sure knowledge is immediately used and incorporated into training and project design rather than to create formal products.”

— USAID, Documented learning agenda interviewee

There were some notable examples of applying knowledge generated through the learning agenda. These revolved around four themes. The first was the use of information to inform policy, programming, or planning processes. For example, the creation of the *localworks* programming is often directly attributed to the DGP learning agenda and its findings. Others cited the use of learning agendas in budgetary decision-making or as positively influencing work with implementing partners. One notable example is BFS/Feed the Future’s evaluation synthesis, generated in the learning agenda, as a reference point in the U.S. government’s Global Food Security Strategy.

“What did we learn from the first learning agenda experience? It’s more thinking about the ‘end game’ (after you have developed the agenda).”

— USAID, Documented learning agenda interviewee

The second theme was the planned integration of content into existing training modules for staff. This mostly focused on forward-looking plans for integrating evidence generated through the learning agenda, and finding appropriate opportunities to integrate it into training modules. For example, the DRG learning agenda plans to integrate findings into gender and political economy analysis training. Significantly, some interviewees said that integrating such content into training practices may be the most efficient way of leveraging evidence developed in learning agendas.

The third theme was the interviewees’ desire to ensure that their learning agendas became a “living document” and their attempts to update them regularly. Yearly updates were the most common, but some occurred less frequently, such as BFS/Feed the Future, which involved more than one agency. In most cases, the updating process was more streamlined than the original formulation process. In the initial process, the DRG, for example, spent 5 months convening five Theme Teams, conducting a survey of Mission DRG officers and M&E points of contact, and obtaining the necessary input and clearances from leadership. A year later, however, the updating process involved a single consolidated Learning Agenda Advisory Group and fewer lengthy consultations with other stakeholders because of the buy-in that resulted from the initial process.

Last, related to the benefit of learning agendas as instruments for organizational change, interviewees asserted that the process of developing, implementing, and disseminating a learning agenda influenced the way people prioritized using evidence in decision-making. Some of the best examples of utilization involved influence over policymaking decisions related to learning questions in the agenda. For example,

HUD used evidence from its learning agenda to amend a policy on administrative fees associated with Housing Choice Vouchers Program, the U.S. government’s major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. The [Housing Choice Voucher Program Administrative Fee Study](#) suggested a change in the formula to close the gap between the program’s costs and the fees collected to administer it, resulting in an estimated additional cost of approximately \$376 million.²⁰

H. INTERVIEWEES’ RECOMMENDATIONS ON LEARNING AGENDAS

Based on their experiences developing, implementing, and using learning agendas, interviewees mentioned a number of challenges, lessons, and recommendations for anyone considering creating an agenda.

The first recommendations addressed the planning and implementation process. Interviewees suggested remaining flexible to ensure that all relevant feedback was included. Piloting of new ideas or concepts in the learning agenda was also considered useful. They also suggested bringing coherence to the agenda by linking it to existing efforts, using existing processes (where applicable), and using multiple communication avenues during implementation and dissemination. Other suggestions pertained to planning for a learning agenda, including aligning it with strategy or strategic goals; making the learning process living, adaptable, and updatable; and recommending that any agenda should attempt to show its audience “value” early in the process.

“The process has helped people think more about what they were going to do with the research results.”

— USAID,
New/Noteworthy
learning agenda
interviewee

In addition, a key part of the learning agenda planning process appears to involve the opportunity to understand, take stock of, and synthesize the state of knowledge and learning. This often involved using databases or spreadsheets to document research, mapping existing efforts, and conducting or referencing literature reviews. Furthermore, the Corporation for National and Community Service and the Substance Abuse and Mental Health Services Administration have utilized extensive spreadsheet arrangements to curate existing content, and have used this as a mapping initiative to understand gaps in evidence. Alternatively, USDA/FAS conducted systematic reviews that looked at academic and practitioner research related to topics of interest.

Furthermore, some interviewees remarked on the importance of capturing tacit and experiential knowledge. Some learning agendas included interactive sessions such as experience summits. These were often deployed to share and elicit tacit and experiential knowledge. Experience summits often played a lesser role than more rigorous evidence, such as from evaluations or research studies. While these products regularly contain aspects of tacit knowledge, the opportunity to share this information was less frequently used in learning agendas. The FAB learning agenda was one example of a more integrated way to combine this type of interaction: It included experiential sharing sessions to complement other learning activities.

“There are different audiences for different types of learning products, so it’s hard to pull lessons that fit for everyone.”

— USAID, New/Noteworthy
learning agenda interviewee

²⁰ Detailed information on the study can be found at <https://www.huduser.gov/portal/hcvfeestudy.html>.

Interviewees said one advantage of this approach was its ability to draw in new audiences or raise the salience of the learning agenda among existing audiences.

While there may be a link between the method of stakeholder engagement and increasing the likelihood that any information generated will be used, this was not expressly articulated by interviewees. However, interviewees did cite the importance of targeting a specific mode and audience when determining how to disseminate information, such as in person or via email correspondence. This is related to the recommendation on the importance of understanding and targeting the correct audience. In understanding the audience, interviewees cited the need to recognize the credibility of the disseminator, that the format of products should be tailored toward the audience, and that any formal document should meet the identified needs of the audience. Last, interviewees recognized that this level of analysis requires time and resources.

Interviewees also provided two time-related recommendations. First, be mindful of time commitments to ensure participation. This was often linked to the challenge of ensuring consistent engagement from stakeholders and the use of multiple methods of communication. Second, they mentioned promoting a sense of urgency around the initiative to encourage participation and generate interest during formulation and implementation.

Many interviewees also cited the challenges that engagement presented. These related to the additional time required of facilitators and the stakeholders. Interviewees asserted that building consensus, especially around prioritizing learning questions, was a challenge. Recommendations included being conscious of others’ time, anticipating delays, and balancing the need for participation without overburdening stakeholders. Interviewees also suggested “right-sizing” the level of engagement to ensure that the level of effort is in line with the type of feedback or involvement needed. In addition, it is important to understand that results may vary even though models for engagement may be similar. For instance, in one learning agenda effort, participation among the groups convened was uneven and the pace of progress varied. Within USAID, engagement on learning agenda efforts often revolved around using existing forums or staff as resources, such as the use of existing champions and Communities of Practice for the Local Solutions efforts. In contrast, other learning agendas created new, specific groups, such as the Theme Teams in the DRG learning agenda.

To understand how prospective learning agendas can respond to challenges, Table 2 summarizes interviewees’ comments related to challenges faced in the formulation, implementation, and dissemination of learning agendas, and presents recommendations for these challenges.

TABLE 2. CHALLENGES AND RESPONSES CITED BY INTERVIEWEES

CHALLENGES	RESPONSES
A lack of a common understanding related to definitions and language	<ul style="list-style-type: none"> Define terms clearly and consistently at the outset. Interviewees often questioned the difference between research (agenda) and learning agenda.

TABLE 2. CHALLENGES AND RESPONSES CITED BY INTERVIEWEES

CHALLENGES	RESPONSES
Channeling information flows quickly and to the right people	<ul style="list-style-type: none"> • Understand the best dissemination avenue or person to convey information related to the learning agenda • Do not give out large documents; instead, tailor communications to audience in terms of messaging and format • Use concept of “backward-map” process to work backwards from decisions to create mechanisms and processes to support the optimal information flow
Ensuring consistent participation and maintaining interest through the process	<ul style="list-style-type: none"> • Give specific details to stakeholders on learning agenda formulation, implementation, and dissemination processes to generate interest • Ensure equal investment across teams by engaging with stakeholders on the formulation, implementation, and dissemination processes • Aim to demonstrate early value of the learning agenda to stakeholders with timely or salient information
Working within existing USAID structures and arrangements, including knowledge management	<ul style="list-style-type: none"> • Create action items for products to create momentum and ensure accountability • Use budgets and the procurement process to help inform priorities and support the implementation of the learning agenda • Link the learning agenda to ongoing office, bureau, and Agency-wide initiatives
Resource constraints on funding and time	<ul style="list-style-type: none"> • Ensure adequate resourcing, particularly staff, where possible • Allow for some unstructured time or delays • Do as much planning work “up front” to structure and design the learning agenda to maximize existing efforts and resources and minimize level of effort from others
Ensure usage and application of information generated	<ul style="list-style-type: none"> • Ensure the right level of focus for audience and goal • Find areas that have practical application • Track usage of findings • Focus on utility of evidence and information generated by the learning agenda • Think of the end game, including the decision-point that evidence from the learning agenda is intended to inform • Use the concept of positive deviance to identify factors behind current successes to inform learning agenda dissemination
Building consensus	<ul style="list-style-type: none"> • Understand the audience and its needs • Match needs of the audience, bureau/office, and existing evidence gaps • Tie the learning agenda to existing work, efforts, and priorities

V. OVERLAPS BETWEEN DOCUMENTED LEARNING AGENDAS

A close content and thematic analysis of the documented learning agendas reveals three meta-themes, along with their sub-themes, that may be useful to those formulating learning agendas at USAID. These themes could also be of use in framing commonalities and opportunities for collaboration among those participating in ongoing or completed learning agendas.

- **Crosscutting:** the impact of a topical focus or general approach on development outcomes in general
 - **Gender and marginalized groups.** Several documents associated with learning agendas focus on improving the position of women and marginalized groups. Youth was also covered by the DCHA/DRG learning agenda and could be an additional common theme.
 - **CLA** (or at least some of its components) were mentioned in several learning agenda documents.
- **Program implementation:** topics that affect the implementation of development interventions
 - **Local partners and ownership.** Processes related to local partners is a key theme that appears in several learning agenda documents, including the Local Solutions and DGP agendas.
 - **Technology adoption.** The use or uptake of technology or innovation by stakeholders was a minor theme across some learning agenda documents.
 - **Resiliency and risk.** References to understanding responses to risk or shocks was also a theme in some learning agenda documents.
- **Integration:** the impact of one development sector on the outcomes of another²¹
 - This involved both institutional and economic sectors. For example, the role of political institution-related processes or reforms on the economy and the health sector, or the impact of economic-related areas (e.g., markets, employment, and income) on other sectors, such as the environment and education. One potential common connection is the role of corruption, which relates to the intersection of political institutions and the economy; this is addressed in the BFS/Feed the Future learning agenda.

Areas that may have evidence applicable to other sectors were identified through a content analysis of documented learning agendas' themes and questions. Table 3, which begins on the next page, details this analysis with the potential applicability of themes, areas, and questions to other sectors.²² It is likely the findings would be relevant in determining how other sectors or USAID would apply or leverage this information more broadly. Other documented and new/noteworthy learning agendas have learning questions related to these themes, but they remain less evident.

²¹ Integration refers here to understanding how certain mechanisms, processes and activities in one sector might influence other sectors, to support the design, implementation and evaluation of multi-sectoral approaches.

²² Many of the themes in the table appear to link to only two learning agendas, BFS/Feed the Future and DCHA/DRG. Due to their focus and length, more illustrative examples from these agendas could be used.

TABLE 3. TECHNICAL OVERLAP OF DOCUMENTED USAID LEARNING AGENDAS

THEME	AREA	ILLUSTRATIVE QUESTIONS FROM DOCUMENTED LEARNING AGENDAS
Crosscutting	Gender & marginalized groups	<p>Have interventions changed risk-reduction strategies pursued by men and women to cope with shocks (health-related, agro-climatic, economic, socio-political)? (BFS/Feed the Future)</p> <p>Have capacity-building and increased leadership/management opportunities for women led to increased participation of women in leadership roles in the community? (BFS/Feed the Future)</p> <p>Have programs that emphasize gender equality and the empowerment of women led to reduced poverty and hunger? Does empowering women lead to reduced poverty and hunger? (BFS/Feed the Future)</p> <p>Have interventions advancing commercialization in value chains affected access to paid employment or types of employment for men and women? Have they led to increases or decreases in unpaid work for men or women? (BFS/Feed the Future)</p> <p>What factors influence youth to become involved in constructive political participation instead of violence or apathy? (DCHA/DRG)</p> <p>What are the most effective ways to encourage women’s civic and political participation in contexts of resistance to gender equality, and what are the risks to women of these strategies? (DCHA/DRG)</p>
Program Implementation	Technology adoption	<p>What are characteristics of effective, efficient and sustainable vehicles for promoting adoption of innovation (technology, practices, behaviors) and diffusion of products and new technologies among the poor, women, and socially marginalized? What are the most binding constraints in promoting technology adoption and the most effective interventions for dealing with these constraints? (BFS/Feed the Future)</p>
Program Implementation	Local partners & ownership	<p>What challenges have resulted from working directly with local partners, and how have we and our partners responded to those challenges? (Local Solutions)</p> <p>How can USAID improve partnerships with local organizations? (DGP)</p>
Program Implementation	Resiliency & risk	<p>What interventions improve the ability of vulnerable households to withstand (stable consumption and protected assets) common and extreme shocks affecting their economic activities? In what ways? (BFS/Feed the Future)</p> <p>What interventions strengthen the ability of vulnerable households to recover (regain consumption levels and rebuild lost assets) from common and extreme shocks? (BFS/Feed the Future)</p> <p>In what contexts does assistance to national human rights institutions lead to improved human rights outcomes? How can the possible risks of such assistance be mitigated? (DCHA/DRG)</p>
Integration	Impact of one sector on another	<p>When participation, inclusion, transparency, and accountability elements have been implemented in non-DRG programming, how do outcomes in that sector change? (DCHA/DRG)</p> <p>When citizen participation has led to local reforms in a particular sector, what processes lead to these reforms influencing changes at the regional or national level of that sector? (DCHA/DRG)</p>

TABLE 3. TECHNICAL OVERLAP OF DOCUMENTED USAID LEARNING AGENDAS

THEME	AREA	ILLUSTRATIVE QUESTIONS FROM DOCUMENTED LEARNING AGENDAS
		<p>Where there has been collective action to improve local service delivery in one sector, how does that affect collective action to improve delivery in other sectors? (DCHA/DRG)</p>
		<p>In what ways might decentralization or deconcentration affect (i) the nature of citizen participation in political processes; (ii) citizen support for the national government; (iii) policy outcomes; (iv) electoral accountability; and (v) the quality of service delivery? (DCHA/DRG)</p>
		<p>In the context of hiring civil servants and providing positive and negative incentives for their behavior, what kinds of interventions are most effective at reducing the propensity of civil servants to engage in corruption? (DCHA/DRG)</p>
		<p>To what extent do different interventions to promote market access (such as promoting access to markets with lower risks and lower entry barriers) generate the participation of poorer households? (BFS/Feed the Future)</p>

VI. CONCLUDING REMARKS

This report details the most promising practices, challenges, and lessons learned by those tasked with formulating, implementing, and disseminating the findings of learning agendas. Two overarching themes related to the use and understanding of learning agendas are noteworthy.

First, there is great interest in and momentum toward the use of learning agendas. As this report details, learning agendas are an increasingly utilized tool within USAID/Washington and the federal government. This is often linked to the flexibility and scalability of learning agendas to accommodate different levels of enquiry and a mixture of purposes.

Second, there continues to be varied and nuanced language around learning agendas. Interviewees used a variety of terms to describe similar initiatives, such as “evidence-building roadmaps” and “learning projects.” The language is often chosen with the audience in mind, using whichever terms were most recognizable, appealing, and accessible.

When considering or embarking on a learning agenda process, three main relevant trends were identifiable:

1. **Linkages to strategic objectives or goals:** Most existing learning agenda initiatives linked their learning questions and themes to their relevant policy objectives and strategies. These high-level objectives often provided the organizing framework for more specific questions elicited from stakeholders, and helped ensure that the agendas served and related to broader strategic priorities and decision-making needs.
2. **Process is as important as content:** For most, the process of developing a learning agenda 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.
3. **Leadership and resources were critical:** 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 priority that motivated broad-based participation in their formulation, implementation, and use.

When formulating, implementing and disseminating findings from learning agendas, interviewees made three observations:

1. **Collaborative processes were key:** Interviewees emphasized the importance of integrating iterative, consultative processes with diverse stakeholders throughout the formulation and implementation of learning agendas. Participatory processes fostered engagement and buy-in, enhanced learning agenda relevance and use, and facilitated coordination and collaboration. Knowing when and how to limit consensus-building to keep efforts moving forward and avoid “consensus fatigue” were equally important.
2. **Focus on knowledge use 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 often tried to address needs to improve the collection and dissemination of evidence to make it more easily accessible to end-users and promote the use of evidence in decision-making.

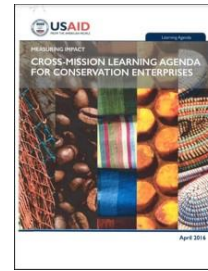
3. **Learn through multiple knowledge sources:** Learning agenda efforts focused on strengthening the quality and variety of knowledge sources to enhance learning. While many adopted research policies and evaluation practices to improve quality standards for evidence, they also recognized that learning for continual improvement required multiple knowledge sources. These included 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.

ANNEX I. DOCUMENTED LEARNING AGENDA SUMMARY TABLE



[DCHA/DRG Brochure](#)

Point of contact: Laura Adams,
Senior Learning Advisor, DRG



[E3/Forestry and Biodiversity \(FAB\) Document](#)

Point of contact: Megan Hill,
Natural Resource Management Specialist, FAB



[BFS/ Feed the Future Document](#)

Point of contact: Zachary Baquet,
Senior Knowledge Management Advisor, BFS



[GH / Health Systems Strengthening Narrative Report](#)

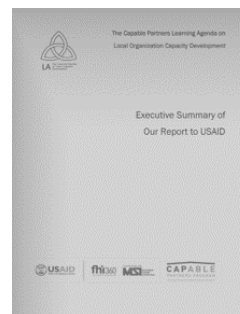
Point of contact: Bob Emrey,
Lead Health Systems Specialist, GH/OHS



[Local Solutions Narrative Report](#)

Point of contact: Danielle Pearl,
M&E Specialist, E3/LS
(formerly Local Solutions M&E Coordinator, PPL/ILR)

Point of contact: Jennifer Gauck,
Senior M&E Specialist, PPL/ILR/Expanding M&E Capacities



[Development Grants Program \(Inactive\) Report](#)

Point of contact: Daniel Grant,
localworks Program Advisor

ANNEX II. USAID/WASHINGTON DOCUMENTED LEARNING AGENDAS

DCHA/DRG LEARNING AGENDA

DRG has one of the most fully developed office-wide learning agendas at USAID, with high-quality documentation, extensive learning activities and products, and integrated mechanisms that promote ongoing collaboration. The initiative grew from a concept note developed in summer 2015 by Learning Division staff members and supported by the director of DRG and the deputy assistant administrator of DCHA. The formulation, implementation, and updating of DRG’s learning agenda are supported by seven full-time staff in the Learning Division. Updated annually, the agenda aligns learning efforts with the DRG’s strategy and theory of change, and relies on participatory processes to ensure questions, activities, and products focus on knowledge utilization.

The learning agenda has built broad-based excitement and buy-in through the creation of internal groups (e.g., Theme Teams, an Advisory Council) and mechanisms (small-grants program) that support ongoing communication and collaboration horizontally across DRG divisions, vertically between staff in Washington and the field, and externally with academic and other evidence-building efforts. Learning agenda teams highlighted their promising practice of issuing small, competitive grants to universities to conduct multi-disciplinary literature reviews around high-priority learning questions. Before final products are written, DRG brings together academics with USAID program staff for discussions about what information/evidence would be most useful for their work. According to interviewees, the resulting documents have been useful in planning and implementing DRG-related projects and activities. Learning agenda efforts focus on conducting learning activities, “sharing back” findings and information with staff, and disseminating findings.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/adapting learning agenda (completed)
Materials	2016 Brochure ; 2017 Brochure ; How to Create a Learning Agenda ; Examples of Research ; Examples of Evidence
Key Learning Questions	<p>2016 learning agenda: 12 mid-level learning questions in four thematic areas (3 questions per theme): 1) Participation & Inclusion; 2) Transparency & Accountability; 3) Human Rights; and 4) DRG Integration</p> <p>2017 learning agenda: 11 learning questions in five thematic areas: 1) Participation & Inclusion; 2) Transparency & Accountability; 3) Human Rights; 4) DRG Integration; and 5) Theories of Democratic Change</p>
Key Learning Activities	Multiple research projects in each thematic area; evidence/literature reviews; and learning product development & dissemination (infographics, 2-pagers, short video posts, and webinars)
Timing	2015: Initiated by DCHA deputy assistant administrator, DRG director, and Learning Team leader; first learning agenda took 5-6 months to develop; update of learning agenda took 2-3 months

Steps in Process	<ol style="list-style-type: none"> 1. Wrote concept note, aligning learning agenda with DRG strategy 2. Convened Theme Teams around DRG objectives with cross-division membership 3. Developed action plans for each question 4. Created materials & publicized learning questions 5. Surveyed stakeholders to prioritize questions 6. Conducted utilization-focused research 7. Shared findings with Theme Teams, Missions, and other stakeholders 8. Strategized about utilization of findings (& tracking utilization) 9. Created Learning Agenda Advisory Group to oversee annual update of learning agenda
Current Activities	Implementation of research, “sharing back” with staff, disseminating findings
Next Steps	<ul style="list-style-type: none"> ● Integrate and build from current DRG research & evaluation ● Advisory Group reviews and updates learning agenda
Strengths	<ul style="list-style-type: none"> ● Focus on practical questions and utility of evidence ● Support from leadership ● Participatory process for learning agenda creation ● Seven full-time staff on learning team involved with the learning agenda initiative
Challenges	<ul style="list-style-type: none"> ● Timing: learning agenda development process was long and convoluted—needed streamlining ● Uneven pace & participation of theme teams—needed more consistency & clear expectations
Promising Practices	<ul style="list-style-type: none"> ● Created ongoing, internal structures and mechanisms to facilitate learning agenda work, including: <ul style="list-style-type: none"> ○ Center teams have Learning Division backstops to improve communication/information flow & consultative processes. ○ Advisory Group provides oversight & keeps learning agenda updated and relevant. ○ Small-grants mechanisms fund interdisciplinary graduate student working groups to assist with literature reviews, and provide funds for evidence generation and dissemination.
Recommendations	<ul style="list-style-type: none"> ● Use existing structures or create new channels of communication that facilitate broad-based consultation and collaboration in developing and using the learning agenda ● Get people excited about the learning agenda ● Focus on how evidence will be used from the beginning ● Create opportunities for program staff to engage with researchers and evidence
Point of Contact	Laura Adams, Senior Learning Advisor, DRG

E3/FAB LEARNING AGENDA

FAB has developed a highly collaborative, cross-Mission learning agenda on conservation enterprises under its 5-year Measuring Impact contract that leverages relevant evidence and experience in different country contexts to improve project design, implementation, and impact. Building on a literature review and organizational analysis of learning at USAID, the learning agenda team used an inductive approach to develop the conservation enterprises learning agenda. The agenda focused on the practical knowledge needs of Mission staff and implementing partners. The team elicited theories of change and learning questions from staff at eight Missions and the E3/FAB office, and synthesized them into a shared theory of change. They then mapped evidence from the literature and Missions onto their shared theory of change and produced a searchable, editable wiki.

The agenda identifies learning gaps and includes key learning questions, planned activities, and learning group products with explicit definitions of purpose, value, and audience for each. FAB's learning agenda initiative also took a communities-of-practice approach in establishing a problem-focused, collaborative Conservation Enterprises Learning Group to implement learning activities and develop products. Its efforts have had a strong, diverse stakeholder representation and high response rates from the field. FAB recently developed a second learning agenda focused on combating wildlife trafficking and has launched a Combating Wildlife Trafficking Learning Group.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/ synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) <input type="checkbox"/> Updating/ adapting learning (planned)
Materials	Learning agenda ; Making Use of the Portfolio: Organizational Learning at USAID (literature review and technical analysis) ; Framework for Biodiversity Cross-Mission Learning Program ; Research Agenda
Key Learning Questions/ Themes	<p>Five sequential learning questions related to FAB's theory of change:</p> <ol style="list-style-type: none"> 1. Are enabling conditions in place to support sustainable enterprise? 2. Does the enterprise lead to benefits for stakeholders? 3. Do the benefits realized by stakeholders lead to positive changes in attitudes and behaviors? 4. Do positive changes in stakeholders' behaviors lead to a reduction in threats to biodiversity (or restoration)? 5. Does a reduction in restoration lead to conservation?
Key Learning Activities	<p>The learning agenda identifies multiple, specific learning activities, planned learning products, and intended use/value of products for each learning question.</p>
Timing	<p>2015: Initiated by Measuring Impact project/contract; supported by Bureau and Office leadership</p> <p>2016: Final report released in April</p>

Steps in Process	<ol style="list-style-type: none"> 1. Conducted literature review and organizational analysis of learning efforts at USAID 2. Elicited information about what works, learning needs, and theories of change from stakeholders and Missions 3. Developed a theory of change based on Mission documents and interviews 4. Mapped evidence and questions onto theory of change and produced a searchable wiki 5. Identified evidence gaps and priority topics 6. Created collaborative Learning Groups (including FAB, interested Missions, and other interested USAID staff) to address learning agenda questions 7. Convened people (through various platforms) to improve evidence dissemination and use
Current Learning Agenda Work	<ul style="list-style-type: none"> ● Creating learning groups ● Developing interactive platforms for improving dissemination and use of evidence ● Maintaining a log of use of application of learning to USAID work
Strengths	<ul style="list-style-type: none"> ● People are highly engaged and feel a strong sense of ownership. ● FAB's elicitive approach to evidence gathering and consultative/dialogues in developing a shared theory of change created strong buy-in. ● Problem-driven and utilization-focused approaches keep the learning agenda relevant to end-users. ● Strong, high-level support provided project resources and legitimacy.
Challenges	<ul style="list-style-type: none"> ● The initial, exploratory research took too long—need to maintain momentum around initial discussions and launch learning group activities more quickly ● Still exploring different formats for disseminating findings and improving use (IT platforms have been challenging) ● Still identifying best ways to measure progress and use
Promising Practices	<ul style="list-style-type: none"> ● Used highly participatory, elicitive processes that generated a lot interest and high response rates from Mission staff ● Established cross-Mission collaborative learning groups to help create and use the learning agenda
Recommendations	<ol style="list-style-type: none"> 1. Begin with an elicitive and participatory process that engages Missions 2. Frame the learning agenda around a specific theory of change to focus learning on conditions under which key assumptions hold true 3. Focus learning agendas on a finite set of specific/practical questions. 4. Create on learning activities and products with clear purpose and value to defined audience(s) so evidence provides actionable guidance 5. Do as much work as possible prior to meetings so when groups are convened they can use time effectively
Point of Contact	Megan Hill, Natural Resource Management Specialist, FAB

BFS/FEED THE FUTURE LEARNING AGENDA

Feed the Future’s inter-agency learning agenda, led by the initiative’s learning agenda, was an interagency effort primarily led by USAID and the Millennium Challenge Corporation. The purpose of the agenda is to learn about which interventions have the greatest impact in a given context, which are most cost-effective, and what combination and/or sequence of interventions/investments have the greatest impact on the objectives of improving agricultural growth, reducing poverty, and reducing malnutrition. It is also necessary to develop a learning agenda to determine related effects of Feed the Future interventions on women’s empowerment, vulnerable populations, farm and off-farm employment for males and females, effects of global climate change, and improved natural resource management that sustains livelihoods and resources for future generations.

The learning agenda identifies six key themes and associated strategic questions around advancement of global agricultural development, increased food production and food security, and improved nutrition, particularly for vulnerable populations such as women and children. The learning agenda team developed themes and questions through an analysis linking Feed the Future’s results framework and Missions’ Multi-Year Strategy, then organized working groups of technical experts to refine and prioritize questions. The team vetted final learning questions through a series of meetings with diverse stakeholders. Participating agencies helped sponsor and conducted the learning activities; the original intent was for key questions to be addressed through rigorous impact evaluations. Interviews revealed challenges in the learning agenda, including that using impact evaluations as the only source for answering learning agenda questions proved difficult due to the time and expenses needed to implement these types of evaluations, and it was sometimes difficult to coordinate agencies with different levels of financial authorization for the initiative during the revision of the learning agenda. Feed the Future is now beginning to develop a next round to the learning agenda that will build on important lessons, such as expanding learning activities and knowledge sources beyond impact evaluation, and integrating mechanisms to ensure the agenda is a “living process,” adapted along the way to reflect new evidence and changing contexts.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/ adapting learning (planned)
Materials	Feed the Future learning agenda ; learning agenda PPT ; learning agenda summary
Key Learning Questions/ Themes	<p>Six key themes: 1) Agricultural Productivity; 2) Markets & Trade; 3) Gender & Women’s Empowerment; 4) Research & Development; 5) Nutrition & Dietary Diversity; and 6) Resilience of Vulnerable Populations</p> <p>Under each theme are key questions (29 questions total)</p>
Key Learning Activities	Review and document existing evidence; conduct impact evaluations related to learning questions and themes
Timing	<p>2011: U.S. govt. interagency initiative led by USAID; support from BFS assistant administrator</p> <p>2012: Report was released in April</p>

Steps in Process	<ol style="list-style-type: none"> 1. Generate a “laundry list” of questions by examining causal linkages in Feed the Future’s results framework and Missions’ Multi-Year Strategies 2. Develop learning agenda themes and refine questions through an analysis of questions by BFS/M&E and experts from the International Food Policy Research Institute 3. Prioritize questions in each theme through working groups of technical experts 4. Develop concept notes on learning agenda themes 5. Vet and refine learning questions by convening meetings of researchers, evaluators, reps from civil society organizations, and USAID/U.S. govt. experts 6. Conduct final vetting with Feed the Future Missions and BFS/Office of Country Strategies & Implementation and Feed the Future senior leadership 7. Roll out learning agenda for operational use in reviewing and conducting impact evaluations
Current Learning Agenda Work	<ul style="list-style-type: none"> ● Using the Feed the Future learning agenda as a framework, BFS synthesized a report from 196 performance and impact evaluations from 2010 to 2015 that looked at how these evaluations provided evidence or understanding for the key questions. ● Developing dissemination and uptake strategies
Next Steps	<ul style="list-style-type: none"> ● Make the learning agenda a “living process” with feedback loops that allow questions and priorities to change as programs change ● Develop a new interagency learning agenda for the Global Food Security Act
Strengths	<ul style="list-style-type: none"> ● Highly consultative process in identifying and prioritizing themes and questions ● Strong leadership support that made the learning agenda publicly visible—increased transparency and accountability
Challenges	<ul style="list-style-type: none"> ● Consensus-building fatigue from all the work developing themes/questions and aligning impact evaluations ● The Global Food Security Strategy legislation authorizes funds only for USAID and the U.S. Dept. of State, so members of the MEL Interagency working group faced challenges around funding and how they might support/participate in the development of the new learning agenda. This was despite wide participation in the MEL Working Group. Looking ahead, they will explore ways to better share ownership of developing the Global Food Security Strategy learning agenda. ● Focus on impact evaluations was too limited. A broader range of data and information sources, to include performance evaluations and other data collection methods, would have improved dissemination and utilization.
Promising Practices	<ul style="list-style-type: none"> ● Strong cross-agency collaboration throughout the formulation of the learning agenda, including focus on reflection and discussion of key design issues (e.g., At what level and in what detail is a learning agenda useful?) ● The Feed the Future Synthesis of Evaluations Report was used to inform the Global Food Security Strategy.
Recommendations	<ul style="list-style-type: none"> ● Important to clarify at what level and in how much detail a learning agenda will be useful ● PPL/LER can play an important role <ul style="list-style-type: none"> ○ Providing support and guidance as offices develop learning agendas ○ Promoting coordination and collaboration across USAID learning agendas with complementary themes and questions ○ Supporting organizational learning by creating an information management center for evidence
Point of Contact	Zachary Baquet, Senior Knowledge Management Advisor, BFS

GH/HSS LEARNING AGENDA

The MTE initiative establishes a learning agenda across technical areas for HSS within GH's OHS. Evidence of how HSS reforms and interventions affect the performance of health systems and contribute to sustained improvements in health outcomes is "scarce, scattered, and not widely disseminated," and these gaps hinder support from various stakeholders. GH's assistant administrator supported MTE's efforts to synthesize existing evidence and generate new knowledge. While learning is a key component of this effort, encouraging Congressional investment and other external financing for HSS also drove initial commitment for developing the learning agenda.

The learning agenda was developed by a staff of two using an inductive approach. The learning agenda team conducted a preliminary stocktaking exercise of HSS activities and categorized them according to three principal questions that were technical, methodological, and strategic in nature. They also created new questions to guide future knowledge-generating activities based on identified learning gaps. The process of developing this crosscutting agenda revealed significant barriers in GH's organizational culture, funding structures, and knowledge management systems to horizontally collaborate between offices on crosscutting issues such as HSS. Further efforts will aim to improve evidence gathering, dissemination, and feedback loops across GH offices and with Missions.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (ongoing) ✓ Generating knowledge ✓ Capturing/synthesizing knowledge (ongoing, across some activities) ✓ Sharing knowledge (ongoing, across some activities) <input type="checkbox"/> Applying knowledge (ongoing, across some activities) <input type="checkbox"/> Updating/adapting learning (planned)
Materials	MTE Status Report ; MTE PPT
Key Learning Questions/Themes	<p>Three principal learning questions (developed inductively based on collection and review of evidence):</p> <ol style="list-style-type: none"> 1. What does the literature and experience tell us about the impact of HSS interventions on health outcomes? 2. How can we prospectively monitor and evaluate country-level HSS interventions and initiatives? 3. How can we ensure a coordinated, high-impact approach to health systems research?
Key Learning Activities	Eleven learning activities organized by the three principal questions, including literature reviews, research, and product development
Timing	<p>2014: Initiated by GH assistant administrator, implemented by senior research advisor in OHS</p> <p>2016: Final report released in April</p>
Steps in Process	<ol style="list-style-type: none"> 1. Gathered evidence about what works for HSS through investments in implementing partner activities, literature reviews, and calls for relevant evidence/experience within USAID 2. Inductively developed learning questions and identified evidence gaps 3. Prepared and disseminated MTE products, including Impact Policy Report, Health Systems Benchmarking tool, and Improving Quality of Care report
Current Learning Agenda Work	<p>Transitioning MTE portfolio to new staff in OHS</p> <p>Continuing and completing MTE activities that were ongoing in the April 2016 status report</p>

Next Steps	<ul style="list-style-type: none"> ● Close out ongoing activities and disseminate findings ● Possibly add new MTE activities based on specified criteria in current learning agenda ● Facilitate publication in peer-reviewed literature ● Engage USAID Missions in contributing to the HSS evidence base
Strengths	<ul style="list-style-type: none"> ● Successfully gathered scarce, scattered, and un-disseminated evidence on what works to strengthen health systems ● Received strong support from GH leadership (2014-2016) ● Good response rates from calls for evidence within USAID
Challenges	<ul style="list-style-type: none"> ● Very limited staff and few resources to implement the MTE initiative ● Organizational culture and structure were not supportive of focusing on this crosscutting issue ● New OHS staff and GH leadership may reprioritize this agenda and the investments ● Very little input from Missions or implementing partners at a country level due to resource constraints
Promising Practices	<ul style="list-style-type: none"> ● Used inductive learning agenda development process of gathering and synthesizing existing evidence first, then identifying the broad questions they answered ● Used evidence base to raise funds and advocate for HSS work
Recommendations	<ol style="list-style-type: none"> 1. Understand and carefully navigate USAID’s political economy in establishing a learning agenda 2. Intentionally choose inductive or deductive approaches to agenda development 3. Create broad-based participation in identifying and prioritizing questions so evidence will be relevant and used by many 4. Hold as many listening sessions as possible to widen the discussion on how to prioritize the learning agenda going forward
Points of Contact	<p>Joe Naimoli, health systems research Advisor (from 2013 to retirement in 2016)</p> <p>Bob Emrey, Lead Health Systems Specialist, GH/OHS (Starting in 2017)</p>

LOCAL SOLUTIONS LEARNING AGENDA

PPL currently has a learning agenda for Local Solutions that emerged out of Government Accountability Office audit recommendations for improved accountability, rather than self-identified learning needs. The top-down, externally catalyzed learning agenda approach initially shaped the focus of agenda questions. However, Local Solutions staff have developed an internally driven, participatory process for conducting learning activities that has reshaped the initiative to also include many of Local Solution’s core values and learning needs.

The learning activities are centered around a synthesis of evaluations that maps evidence (about activity design, implementation, and results) from existing USAID evaluations related to local partnerships, capacity, local ownership, and sustainability. In keeping with its values, Local Solutions and Expanding M&E Capacities reached out to its champions and M&E contacts in the Missions and in Washington to crowdsource much of the evaluation review work. More than 80 stakeholders from across the Agency volunteered to read evaluations. The learning activity also assessed reader engagement and asked volunteers, “How does what you read/learned from this review fit in with your work?” They synthesized answers to capture how USAID staff use learning from evaluations to inform their work. Local Solutions and Expanding M&E Capacities completed the evaluation synthesis in fall 2016 and are producing two types of documents, a report for external stakeholders (e.g., Congress) that addresses the Government Accountability Office accountability questions and short (1-2 pages) summaries of qualitative findings by thematic areas for practical use by internal audiences. Staff suggested that an Agency-wide learning agenda initiative provides an exciting opportunity for USAID to take a proactive stance on learning that shifts the conversation away from compliance toward a focus on gathering and using knowledge about what works well in context to improve sustainable development.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) <input type="checkbox"/> Sharing knowledge (planned) <input type="checkbox"/> Applying knowledge (unknown) <input type="checkbox"/> Updating/ adapting learning (unknown)
Materials	Report
Key Learning Questions/ Themes	<p>Three learning questions:</p> <ul style="list-style-type: none"> ● Design: How have we designed projects and activities that engage directly with local partners to support local capacity and achieve locally owned, locally sustainable results? ● Implementation: What challenges have resulted from working directly with local partners, and how have we and our partners responded to those challenges? ● Results: What are the effects of engaging directly with local partners on achieving locally owned, locally sustained development results?
Key Learning Activities	<p>Conduct a review of relevant, existing USAID evaluations; develop and disseminate learning products for diverse stakeholders</p>
Start of Process	<p>2014: Initiated in response to Government Accountability Office audit recommendations</p> <p>Late 2015: Began the formulation process</p> <p>2016: Report released</p>

Steps in Process	<ol style="list-style-type: none"> 1. Developed learning agenda questions 2. Designed learning activities (synthesis of evaluations) using a participatory process rooted in Local Solutions values and mission 3. Conducted the review of evaluations and evaluation synthesis 4. Create reports for different audiences and uses (e.g., external accountability for Congress, thematic summaries for internal audiences) 5. Disseminate findings to diverse stakeholders 6. Track uptake and use of findings 7. Decide next steps for learning agenda updates
Current Learning Agenda Work	Finalizing analysis and results from the synthesis of evaluations
Next Steps	Develop reports, including external report addressing Government Accountability Office/ Congressional accountability questions, and 1-2 page thematic summaries for use by internal audiences
Strengths	<ul style="list-style-type: none"> • Participatory, locally sourced learning activities are rooted in Local Solutions values and supported organizational change • Volunteers expressed very positive feedback about participating in the learning activity
Challenges	<ul style="list-style-type: none"> • Consistency across readers in conducting the evaluation reviews • Political nature of the learning agenda necessitated a balance between external accountability concerns and internal learning interests.
Promising Practices	Designed learning activities (synthesis) around core values of Local Solutions by crowdsourcing the evaluation with more than 80 USAID staff volunteers in the Missions and USAID/Washington. Focused on reader engagement and application of learning (not just evaluation findings) so the whole evaluation process promoted organizational learning.
Recommendations	<ol style="list-style-type: none"> 1. Recognize that the process of learning agenda development and use is as important as the content. The agenda can be an important tool for organizational change, as well as useful in addressing knowledge gaps. 2. Gaining leadership support is key. Organizational leaders have to see the learning agenda's value for achieving their goals and communicate that it is a priority. 3. Ensure that learning agenda initiatives have adequate resources before beginning. 4. Clarify what the key learning questions are and why they are important. 5. Focus on utilization of the evidence from the beginning. 6. Tap into people's intrinsic motivation (e.g., for mastery, autonomy, and purpose) and values in designing learning activities.
Points of Contact	<p>Danielle Pearl, M&E Specialist, E3/LS (formerly Local Solutions M&E Coordinator, PPL/LER)</p> <p>Jennifer Gauck, Senior M&E Specialist, PPL/LER/Expanding M&E Capacities</p>

DGP LEARNING AGENDA (INACTIVE)

The 2012-2013 learning agenda for Local Capacity Development emerged from an evaluation of USAID's DGP, and became instrumental in establishing *localworks* (housed in USAID's Local Sustainability Office in E3). With learning questions grounded in USAID Forward reform principles, independent evaluation consultants, led by external evaluation consultant Tom Dichter (former research director of USAID's Capable Partners Program), conducted extensive learning activities and developed a wide array of learning products that received Congressional attention and support (i.e., championed by Senate Committee on Appropriations staff).

The learning agenda generated a new evidence-base around partnership with local organizations and local ownership, and developed/disseminated a wide range of innovative learning products, such as films, policy papers, research publications and a website. The learning agenda became a (somewhat controversial) advocacy tool for organizational learning and reform at USAID and the broader field of international development. Although this agenda is no longer active, *localworks* is currently in an exploratory phase of developing a new agenda that integrates current USAID learning efforts (in Washington and the field) aligned with its mission. Experiences from this learning agenda initiative highlight the importance of working with strong learning champions at senior levels across the Agency, and effectively navigating the Agency's political economy and organizational culture. It suggests that organizational learning begins with small, practical steps that create time and incentives for staff learning.

Status	<ul style="list-style-type: none"> ✓ Created learning agenda (complete) ✓ Generating knowledge (complete) ✓ Capturing/synthesizing knowledge (complete) ✓ Sharing knowledge (complete) ✓ Applying knowledge (ongoing) <input type="checkbox"/> Updating/adapting learning (ongoing through <i>localworks</i>)
Materials	Learning Agenda For Capacity Development website ; Learning Agenda Full Report to USAID: Executive Summary ; Summary Recommendations
Key Learning Questions/ Themes	<ul style="list-style-type: none"> • How can USAID improve partnerships with local organizations? • How can USAID bolster country ownership of development?
Key Learning Activities	<ul style="list-style-type: none"> • Extensive research, including interviews with 325 organizations and 70 USAID staff in Missions in nine countries • Mini case studies of local capacity development in nine countries • Historical analysis of USAID capacity development efforts • Network analyses in two countries • Literature reviews • Learning product development, including practitioner guidelines, a cartoon strip, a website, films, research reports, and policy papers
Start of Process	<p>May 2012-August 2013: learning agenda emerged out of an evaluation of the DGP, championed by Congressional staff, and conducted by external evaluation consultant Tom Dichter (former research director of USAID's Capable Partners Program)</p>
Steps in Process	<ol style="list-style-type: none"> 1. Identified learning agenda and learning questions from evaluation of DGP 2. Conducted research and literature reviews to fill knowledge gaps 3. Organized learning agenda Advisory Council (with senior development leaders) 4. Integrated feedback from diverse stakeholders 5. Produced products to disseminate evidence 6. Used evidence/findings from learning agenda activities to conduct advocacy around local partnerships and ownership

Current Learning Agenda Work	<i>Localworks</i> was established out of this effort.
Next Steps	<i>Localworks</i> is in the exploratory phase of developing a new learning agenda.
Strengths	<ul style="list-style-type: none"> • Strong Congressional support for the learning agenda initiative • Learning agenda products and evidence are compelling and of high quality • Learning agenda questions and themes aligned with USAID Forward, Paris Declaration on Aid Effectiveness, and other international development policies • Consultative process in agenda development and use that extend horizontally (e.g., with other international development organizations) and vertically (with Missions & local NGOs)
Challenges	<ul style="list-style-type: none"> • A perception that USAID leadership was left out of the loop and this was an initiative driven from the outside • Powerful forces holding current development systems in place—hard to change USAID organizational culture around learning
Promising Practices	The learning agenda produced a variety of high-quality products for a broad range of audiences (e.g., film, research reports, policy papers, and a website)
Recommendations	<ul style="list-style-type: none"> • Gain senior leadership support/commitment to improve organizational learning strategies within USAID • Develop influential learning agenda champions across the Agency • Improve knowledge management systems for collecting and disseminating evidence • Start with small, practical steps to encourage staff reflection and learning (e.g., voluntary book clubs) • Create time and incentives for staff learning (e.g., sharing and applying learning become performance measures) • Foster learning that is external (i.e., relevant to development outcomes and impact) and internal (i.e., relevant to organizational operations, culture, and structure) to USAID • Focus more on process of developing the learning agenda at the beginning than on the content
Point of Contact	Daniel Grant, <i>localworks</i> Program Advisor

ANNEX III. OTHER NEW/NOTEWORTHY USAID/WASHINGTON EFFORTS

This annex provides a brief description of learning agenda efforts that the landscape team learned are underway at USAID/Washington but have yet to be documented or were at the activity level.

GH has begun a new process to develop a new **research strategy**. The previous 5-year Research Strategies (2005-2010 and 2010-2015) were primarily high-level, with specific priorities focused around research funding streams and budget categories for each technical area. The new strategy development effort focuses on developing thematic goals that are shared between the different health technical offices and the approaches that will be utilized to achieve these goals. The overall aim is to further articulate USAID's health related-research vision, as well as the Agency's strengths and capabilities in global health research and how they complement the strengths of other implementing partners and donors. The Research Strategy team developed a draft outline and goals, and now is working with an external consultant to gather and synthesize input from a broader range of stakeholders from USAID and elsewhere to revise the outline and write the full strategy. While the GH Research Strategy will not be a learning agenda, the team hopes that the final document will provide a framework to communicate about USAID's role in GH research to a variety of partners, and that it may be useful to USAID operating units as they seek to develop specific learning or research agendas.

U.S. Global Development Lab is pursuing an innovative learning agenda development process linked to its strategy and results framework, and will finalize learning agenda materials in 2017. The Lab's Office of Evaluation and Impact Assessment has an explicit mandate and dedicated resources to develop this comprehensive learning agenda. Over the past two and a half years, the office has laid the foundation for this learning agenda initiative through a series of participatory processes that fostered collaboration and learning within and across Lab Centers. For example, it engaged teams in developing cohesive theories of change for each Center, brainstorming and prioritizing evaluation and learning plans around questions linked to these theories, and coordinating funding and implementation of cross-Lab M&E, research, and learning efforts. To better understand the current evidence on integrating science, technology, innovation, and partnerships (STIP) to improve development outcomes, it also organized a successful evidence contest (receiving more than 800 documents) for information Lab teams use for decision-making, and funded the creation of a STIP Evidence Gap Map by the International Initiative for Impact Evaluation, which will help guide investment in future research and evaluation efforts. The Office of Evaluation and Impact Assessment also provides support to Lab teams to continue to improve the quality of Lab evaluations and research, and manages the implementation of the Monitoring, Evaluation, Research, and Learning Innovations program, which tests new M&E, research, and learning tools and approaches. Next steps for the Lab learning agenda include developing a process, synched with existing annual cycles, to continue to synthesize and share existing STIP evidence, including engaging the broader Agency more effectively and planning future evidence-building activities at Center and cross-Lab levels that can help fill gaps.

GH/Office of Population and Reproductive Health through the Research, Technology, and Utilization division has made considerable efforts toward developing an office-wide learning agenda. Current work builds on lessons from previous efforts, which identified a set of research questions but stalled in building consensus around priorities. The Research, Technology, and Utilization division has tried to create an inventory system for tracking research projects, reducing duplication of efforts, and

promoting coordination. It has also established a variety of quality control mechanisms (e.g., quality review processes and peer reviews of reports) and is developing a central repository for findings. Staff indicated that support from leadership at the Office of Population and Reproductive Health, linking budget/resource allocations to the strategy, making the process transparent and independent/neutral, and providing early demonstrations of the value to divisions have given this effort visibility and credibility. Next steps include gathering information to answer “What can we learn from what we have done so far?”; developing broader learning questions that link existing efforts to office and bureau strategies; improving knowledge management systems; and promoting use of new knowledge to inform the bureau-level research strategy and improve projects and activities at the country level.

The **Office of Afghanistan and Pakistan Affairs** is in the early stages of developing a broad Learning Portfolio that draws together current research projects and begins a reflective, stocktaking process to identify “what we know” from existing evaluations and experience. Staff recognize that they have ambitious questions—questions that their studies are not currently designed to answer. Their interests focus not only on questions about “what works” in their interventions, but also on whether “how they do their work” is effective for achieving their objectives. Front office leadership and support for the initiative has been critical in moving the learning initiative forward. Next steps involve focusing and prioritizing learning questions, and developing a strategy to ensure findings provide actionable guidance and are used. Staff are excited about the learning initiative because of the contributions it can make to informing USAID’s growing work in conflict zones and rapidly changing environments. In addition, because the office’s initiatives often involve interagency cooperation and coordination (e.g., with U.S. Institute for Peace, the State Department, and the Department of Defense), the learning agenda has broader implications for learning and application of new lessons across agencies.

Partners for Learning (aka Learning Dojo) is a group of operating units at USAID/Washington, facilitated by LEARN and PPL, that is creating a learning agenda on CLA. Group members include representatives from DRG, the Global Development Lab, *localworks*, and FAB. The group has met ten times and is working to create its learning agenda, which focuses on four key themes and associated questions:

- Pool our evidence that CLA makes a difference to development
- Methods/Methodologies that are most effective for measuring the effect or contribution of intangibles (e.g., CLA and STIP) to development results
- Learn how to best engage local actors and create locally driven development
- Change management at USAID and how best to go about creating change for “doing development differently”
- Learn about what effective learning (and application of learning or adapting) looks like

Next steps include creating an action plan for pooling, synthesizing, sharing, and applying the group’s collective learning from identified learning activities. Success factors have included strong facilitation, which has helped maintain group momentum and focus.

Leveraging Economic Opportunities (E3/LEO), a 3-year activity that included working with DFID and the Swiss Agency for Development and Cooperation through the BEAM Exchange, has just finished using its learning agenda. LEO’s early leadership developed learning themes and questions as part of the activity’s scope of work; these have been adapted throughout implementation to align with partnering

agency efforts, input from the field, and knowledge gained from learning activities. LEO staff prioritized evidence use from the beginning. They suggested that Microlinks provided an excellent platform for disseminating learning to a broad audience within USAID and externally. In addition, holding annual partner meetings to take stock of learning, promote “cross-pollination” among efforts, and plan next steps was critical in this collaborative learning initiative. Challenges to this work included aligning vision and coordinating activities among the work streams to promote synergistic, not siloed, effort; keeping earmarked funding and resources connected to learning agenda priorities; and gathering/disseminating learning from/to the field without overburdening busy people. Staff emphasized that the learning agenda provided an important adaptive management tool throughout the activity. More details on the program and background on the learning agenda can be found [here](#).

Office of Food for Peace works on reducing food-related insecurity, bridging the divide between relief and development efforts. Its learning agenda, in the early stages of development, is identified as a strategic goal in its [2016-2025 Food Assistance and Food Security Strategy](#). The strategy was developed in a participatory manner and will mirror the approach that will be used in the development of the learning agenda. This will include strategic engagement with the private sector, universities, private voluntary organizations, and U.N. agencies. Under one of the three corporate objectives focused on M&E, analysis, and applied learning, Food for Peace will work with a broad set of stakeholders to build on the existing evidence base and shape a learning agenda informed by its new strategic priorities. The learning agenda may explore questions that focus on crosscutting areas such as social accountability, gender equity, youth empowerment, and social cohesion. Food for Peace has begun conducting consultations with staff and outreach with the academic community to identify categories of topics to prioritize in the agenda. Next steps will include refining the areas and types of questions in the learning agenda that will support its strategy.

Office of Transitional Initiatives provides fast, flexible, short-term assistance targeted at key political transition and stabilization needs. It is exploring the development of a learning agenda, a process that has included extensive consultations with stakeholders in USAID/Washington and the field. These consultations have included understanding stakeholders’ needs to develop the most appropriate learning agenda approach. The consultations have focused extensively on understanding process-related priorities and needs related to learning agendas, such as the means and methods of dissemination and the provision of knowledge management plans. The agenda will most likely focus on the learning needs of the office’s programs. Next steps include determining the exact scope of a learning agenda, which may focus on providing guidance and larger topics rather than individual questions.

The R&D Hub for M&E is a PPL/LER initiative that is working with a variety of partners to understand “emerging” M&E approaches across USAID. The initiative originally focused on complexity-aware M&E, but has expanded its scope to a broader range of approaches that inform adaptive management. The learning agenda will be implemented through a formal action-research plan aimed at generating a body of knowledge about the benefits of emerging approaches, what monitoring and/or evaluation needs they are best suited to address, and what supports their use. Recent products produced under this learning agenda include a set of eight promising practices related to adaptive management.

Bureau of the Middle East, which operates bilateral Missions, regional programs, and programs without Missions in the Middle East, and is also in the early stages of exploring the development of a learning agenda. Next steps involve conducting extensive consultations with stakeholders, mapping

current work, and ascertaining the appropriate strategy for development and potential areas of focus. Missions in the region and the regional program based in Washington already have a series of learning initiatives, including agendas, to inform their work.

ANNEX IV. FEDERAL GOVERNMENT SUMMARIES

U.S. DEPARTMENT OF LABOR / CHIEF EVALUATION OFFICE

Background	The Chief Evaluation Office, established in 2010, coordinates, manages, and implements the DOL's evaluation program. An independent evaluation office located in the Office of the Assistant Secretary for Policy, it works closely with all DOL offices and agencies to develop and implement evaluations that address priorities set by the secretary of labor and the agencies. It also collaborates externally with other federal departments and in the professional evaluation and research community.
Learning agenda Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/ adapting learning (ongoing)
Materials	Primer: Strengthening a Learning Culture at the Department of Labor
Summary	Learning agendas are an important planning tool at DOL, with the Chief Evaluation Office leading the facilitation process and utilizing the agendas in the development of its own Agency-wide evaluation plan. Working with the 15 agencies within DOL since approximately 2012, the office has supported the creation of 5-year learning agendas for each agency. These agendas, updated every year, highlight priority questions and priority studies that the agencies would like to have done. They may also convey themes for upcoming evaluation efforts or analysis that might be needed. Learning and evaluation priorities identified through the learning agenda might be answered using a number of evaluation designs or methods, including rigorous impact evaluation, descriptive or implementation studies, basic analysis or research, and performance analysis. The agendas are used as a starting point for setting priorities about research questions and possible studies. Evaluations that Congress has required of agencies are also included. Importantly, the agendas communicate and engage operating agencies to help focus the resources and services of the Chief Evaluation Office for its DOL Evaluation Plan. To promote transparency, all evaluations in progress are listed on the office's current studies page ; once completed, all evaluation reports are publicly accessible on its completed studies page .
Point of Contact	Molly Irwin, Chief Evaluation Officer, Chief Evaluation Office

DEPARTMENT OF HEALTH AND HUMAN SERVICES / THE SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION

Background	The Substance Abuse and Mental Health Services Administration (SAMHSA) is a U.S. Department of Health and Human Services agency that leads public health efforts to advance the behavioral health of the nation. Its mission is to reduce the impact of substance abuse and mental illness on America’s communities. Congress established SAMHSA in 1992 to make substance use and mental disorder information, services, and research more accessible. The Center for Behavioral Health Statistics and Quality (CBHSQ) provides national leadership in behavioral health statistics and epidemiology; promotes basic and applied research in behavioral health data systems and statistical methodology; designs and carries out special data collection and analytic projects to examine issues for SAMHSA and other federal agencies; participates with other federal agencies in developing national health statistics policy; and consults and advises SAMHSA’s administrator and the Department of Health and Human Services’ secretary on statistical matters.
Learning Agenda Status	<ul style="list-style-type: none"> ✓ Created learning agenda (ongoing) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (Ongoing) ✓ Updating/ adapting learning (Ongoing)
Materials	None currently available
Summary	In response to the need to better integrate its work with and SAMHSA’s work, CBHSQ began developing a learning agenda. This ongoing process attempts to systematically identify and prioritize statistical research and program evaluation priorities reflecting scientific merit, policy relevance, and effective use of staff and contract resources. CBHSQ first developed a tracker that details current and ongoing research studies, as well as a dashboard of all ongoing evaluation activities regardless of source of funding and lead for the activity. This includes relevant information such as the portfolio, topic area, name of the study, dissemination plan, and timing for distribution and release for research studies, along with the evaluation type, research questions, and degrees of independence for all significant evaluation activities. CBHSQ is also conducting an annual set of spring reviews to take stock of the current research and evaluation portfolio. This provides opportunities to check on priorities and the status of projects, and make necessary adjustments to staff and resources. Next steps include completing this year’s springtime reviews based on the current state of the portfolio topic areas and the tracker, clearing a revised evaluation policy with the program centers and policy and operations offices, reaching out to the executive leadership team to reach consensus on an Agency-wide learning agenda, and sharing those results with the Department of Health and Human Services as it prepares an evaluation strategy for mental health and substance use as required by the 21st Century Cures Act.
Point of Contact	Daryl Kade, Director, CBHSQ

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT / OFFICE OF POLICY DEVELOPMENT AND RESEARCH

Background	The mission of the Office of Policy Development and Research (PD&R) is to inform policy development and implementation to improve life in American communities through conducting, supporting, and sharing research, surveys, demonstrations, program evaluations, and best practices. PD&R compiles, analyzes, and disseminates data to support program operations, enable performance management, and inform program policy. It sponsors major surveys to provide crucial intelligence about the operation of housing markets. Its research and policy studies provide information about policy options and their effects, and make accessible emerging research that can guide practitioners and improve the effectiveness of HUD and its partners. PD&R’s program evaluations provide a crucial form of accountability to the public. Evidence about program outcomes and effects also makes performance measurement a useful tool for managing programs. PD&R coordinates program demonstrations that rigorously test innovative program models before they are brought to full scale.
Learning agenda Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/ adapting learning (ongoing)
Materials	HUD Research Roadmap FY2014-FY2018 and HUD Research Roadmap 2017 Update
Summary	PD&R undertook a structured process in 2011 to generate a learning agenda known as the Research Roadmap. The effort was a response to a 2008 report from the National Research Council of the National Academy of Sciences that indicated that PD&R’s research-agenda setting process had become “too insular,” with “too much of a short-term focus.” First, PD&R began an extensive outreach effort by asking stakeholders to identify emerging research questions related to HUD’s mission, programs, and policy role. Second, a multi-level internal effort analyzed and prioritized research questions based on timeliness, policy relevance, and effective use of PD&R’s comparative advantages. Third, staff subject matter experts developed research proposals to address the priority questions that were refined and selected through an iterative process to become the core, 5-year research agenda of the Research Roadmap. The outreach effort for the initial roadmap included research conferences, a series of listening sessions with federal and non-federal partners, and web-based and email outreach. The outreach yielded almost 1,000 stakeholder suggestions for research questions, research projects, relevant assets, and strategies. The input and subsequent analysis resulted in the Research Roadmap report identifying research priorities for HUD from FY2014 to FY2018. In early 2017, PD&R re-engaged with stakeholders to update and supplement the initial roadmap by identifying more than 500 new research questions and prioritizing them to develop new research projects. The update is intended to be part of a research prioritization process that is sustainable and responsive to stakeholders. It summarizes the evolving federal context for research and evaluation and provides a fresh assessment of emerging research issues in housing and urban development. PD&R’s web portal, HUDUSER.gov, supports the learning agenda in key ways: It provides one-stop access for dissemination of HUD-related data and research produced through the learning agenda, and provides stakeholders with an ongoing opportunity to communicate research questions to HUD.
Point of Contact	Barry Steffen, Social Science Analyst, PD&R

USDA / FAS / OFFICE OF CAPACITY BUILDING AND DEVELOPMENT

Background	FAS links U.S. agriculture to the world to enhance export opportunities and global food security. The Office of Capacity Building and Development's work supports FAS' food security pillar. FAS leads USDA's efforts to help developing countries improve their agricultural systems and build their trade capacity. It also partners with USAID to administer U.S. food aid programs, helping people in need around the world. Its non-emergency food aid programs help meet recipients' nutritional needs and support agricultural development and education.
Learning Agenda Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/ adapting learning (ongoing)
Materials	None currently available
Summary	The Office of Capacity Building and Development has developed two learning agendas to support its work on two USDA programs, the McGovern-Dole International Food for Education and Child Nutrition Program and the Food for Progress Program. Each learning agenda was developed with similar purposes and methods. The agendas identify gaps in the knowledge base for the respective programmatic area and offer relevant learning questions to address them. Each was developed through a series of systematic reviews (e.g., desk research and a review of relevant literature) and consultations (e.g., a set of 1-day workshops and field visits to gather feedback and inputs) with researchers, academics, policymakers, and practitioners with relevant expertise from a wide range of organizations, research institutions, and universities. The learning agendas for both programs will be used to prioritize research and evaluation activities in future years and support other stakeholders in prioritizing their own research in these areas. Next steps involve releasing the finalized learning agenda documents, implementing research studies based on the agendas, and continuing to share and disseminate research findings with internal and external audiences.
Point of Contact	Eleanor Morefield, Evaluator, M&E, Office of Capacity Building and Development

CORPORATION FOR NATIONAL AND COMMUNITY SERVICE / OFFICE OF RESEARCH AND EVALUATION

Background	Established in 1993, the Corporation for National and Community Service is a federal agency that engages more than 5 million Americans in service through its core programs (Senior Corps, AmeriCorps, and the Social Innovation Fund) and the national volunteer efforts through Serve.gov. It is the nation’s largest grantmaker for service and volunteering. The Office of Research and Evaluation advances the Corporation’s mission by building knowledge about the effectiveness of national service, social innovation, civic engagement, and volunteering as solutions to community needs. It also works to improve the decision-making of the Corporation, its grantees, and the field through the use of scientific research methods. This is accomplished by supporting its grantees, offices, and programs in the measurement of performance and results, embedding evidence throughout the development and implementation of its work, and shaping key policy decisions using credible data.
Learning agenda Status	<ul style="list-style-type: none"> ✓ Created learning agenda (completed) ✓ Generating knowledge (ongoing) ✓ Capturing/synthesizing knowledge (ongoing) ✓ Sharing knowledge (ongoing) ✓ Applying knowledge (ongoing) ✓ Updating/ adapting learning (ongoing)
Materials	None currently available
Summary	Following a leadership change, the Office of Research and Evaluation began developing a learning agenda. Previously, the Corporation and the office focused primarily on the collection and analysis of two administrative datasets focused on the volunteering and civic engagement behaviors of a nationally representative sample. To better link data to programming and policy, the office developed a learning agenda through a highly participatory and consultative process that included soliciting feedback generated through a survey of Corporation staff and a series of individual consultations that identified 13 policy areas as priorities. This informed a subsequent mapping exercise that analyzed the priorities and linked them to work focusing on these areas, as well as evidence gaps where research was lacking. This process informed the generation of new research to be undertaken to fill in the identified gaps. The office engages in three primary activities: building the evaluation capacity of staff and grantees, a program evaluation portfolio, and academic research focused on U.S. civic infrastructure. It uses several mechanisms to disseminate research information to its staff, including a website (the “Evidence Exchange”), a quarterly newsletter, in-person sessions, and an annual Research Summit.
Point of Contact	Mary Hyde, Director of Research and Evaluation

ANNEX V. LIST OF INTERVIEWEES

USAID				
BUREAU/OFFICE	INDIVIDUALS	TITLE	1ST ROUND	2ND ROUND
Bureau for Global Health/Health Systems Strengthening	Joe Naimoli	Health Systems Research Advisor (retired 2016)	X	
Bureau for Global Health/Office of Population and Reproductive Health	Maggwa Ndugga Bamikale Feyisetan	Senior Research & Program Advisor; Senior Evaluation and Sustainability Advisor	X	
Bureau for Global Health/GH Research Group	Cara Chrisman Collene Lawhorn	Biomedical Research Advisor (Cara)	X	
Global Development Lab/Office of Evaluation & Impact Assessment	Shannon Griswold Jessica Lucas	Senior Scaling Advisor; STIP Impact Assessment Advisor - USAID	X	
E3/LEO	Kristin O'Planick	COR, LEO contract	X	
Bureau of Democracy, Conflict, and Humanitarian Assistance/Center of Excellence on Democracy, Human Rights and Governance	Laura Ahearn Laura Adams	Senior Learning Advisors & USAID Democracy Fellows	X	X
E3/FAB	Tess Present Megan Hill	Senior Associate (Environmental Incentives); Natural Resource Mgt. Specialist	X	X
USAID Forward/Development Grants Program (now <i>localworks</i>)	Daniel Grant David Jacobstein (Shoreh Kermani in second interview)	Program Advisor, <i>localworks</i>	X	X
USAID Forward/Development Grants Program	Thomas Dichter	Former Research Director of USAID's Capable Partners Program	X	X
USAID Forward/Local Solutions	Danielle Pearl (Jennifer Gauck second round)	Local Solutions M&E Specialist, USAID/PPL/LER (Senior M&E Specialist, PPL/LER/Expanding M&E Capacities)	X	X
Office of Afghanistan and Pakistan Affairs	Kristen Schubert Matt Roberts	Strategy, Monitoring & Evaluation Team Lead; Senior Governance Advisor	X	
Bureau for Food Security/Feed the Future	Zachary Baquet	Senior Knowledge Management Advisor	X	X
USAID Forward/Development Grants Program (now <i>localworks</i>)	Tom Carter	Senior Advisor, Cooperatives, Office of Water, E3		X
Bureau of Democracy, Conflict, and Humanitarian Assistance/Center of Excellence on Democracy, Human Rights and Governance	David Jacobstein			X
PPL	Jennifer Gauck Tonya Giannoni			X
Office of Transitional Initiatives	Elizabeth Dooghan			X
Bureau for Global Health/GH Research Group	Matthew Barnhart	Senior Advisor for Microbicides		X
PPL	20 PPL team members			X

Bureau for the Middle East	Tanushree Isaacman Olivia Griffin	M&E Specialist / Program Analyst, Office of Technical Support, Democracy, Governance, Peace, and Security	X
Mission "proxies"	Lane Pollack, David Ratliff, Laura Coughlin, Colin Holmes, Trish Savage, Chelsea Jaccard		X
DCHA/FFP (Food for Peace)	Joan Whelan	Learning Advisor and Senior Policy and Program Coordination Officer	

FEDERAL GOVERNMENT AGENCIES

AGENCY	BUREAU/OFFICE	INDIVIDUALS	TITLE	SECOND ROUND
U.S. Dept. of Health and Human Services	SAMHSA	Daryl Kade	Director, Center for Behavioral Health Statistics and Quality	X
Corporation for National and Community Service	Office of Research and Evaluation	Mary Hyde	Director of Research and Evaluation	X
HUD	Office of Policy Development and Research	Barry Steffen	Social Science Analyst	X
DOL	Chief Evaluation Office	Molly Irwin	Chief Evaluation Officer	X
U.S. Dept. of Health and Human Services	Office of the Assistant Secretary for Planning and Evaluation	Amanda Cash	Senior Advisor for Evaluation & Evidence	X
U.S. Dept. of Agriculture	Foreign Agriculture Service	Eleanor Morefield	Evaluator, M&E, Office of Capacity Building and Development	X

PPL has also been in email contact with the following offices or technical areas, but has not scheduled interviews because their learning agenda efforts are still nascent: DCHA/Office of Conflict Management and Mitigation, DCHA/Counter-Trafficking in Persons, DCHA/Countering Violent Extremism, Latin America and the Caribbean Bureau, and GH/Office of Policy, Program and Planning.

ANNEX VI. LANDSCAPE ANALYSIS INTERVIEW QUESTIONS

PPL conducted two rounds of data collection, using snowball sampling to identify and increase the respondents before and between each round. Respondents included USAID staff based in Washington, D.C., and representatives from other federal government agencies.

Interviewers used the following sets of questions; which they used depended on the audience and if it was a follow-up or first interview. The first set of questions was for USAID staff and, appropriately modified, federal government interviewees; the second set was for follow-up interviews with USAID staff; and the third set was for USAID interviewees focused on Mission-related topics.

First Set: Original

1. What prompted your office to begin developing a learning agenda?
2. Can you describe how the agenda was created?
3. What did you find most interesting or surprising about the process of creating the agenda?
4. What do you think worked well in the process of developing it? What were some of the challenges?
5. Were there conditions within the organization that supported or inhibited the development of your learning agenda?
6. Are there any questions or themes in your learning agenda that you think may be relevant or useful to other offices or bureaus at USAID? If so, which ones?
7. How has the agenda been used since it was created?
8. What are the next steps for your office with the learning agenda?
9. What would you suggest or recommend to others who may be considering (or just beginning the process of) developing a learning agenda?
10. Who else do you know of who has a learning agenda that we should speak with?

Second Set: Follow-up Interviews

1. Validate information in the preliminary landscape analysis report
2. For your office or bureau, how long did it take to develop your learning agenda? How many staff were needed to develop the learning agenda? Were other resources required develop or manage the learning agenda?
3. Do you have an outlet for the information for those who are responsible for designing projects and activities, for instance? Do you have specific examples of how learning from your learning agenda efforts has been applied at the bureau or Mission level? Was there discussion/documentation on the specific ways that learning and research would be used by your staff and other stakeholders?
4. What criteria or approach did you use for including stakeholders from across different technical bureaus, Missions, or regions?
5. Who are your key, non-USAID/external stakeholders that are aware of your learning agenda? Are they also receiving information about the learning that comes out of your efforts? How do they receive that information?
6. What are areas of inquiry you would encourage PPL to explore in its learning agenda that would be most helpful to informing your work?

Third Set: Mission Proxies Focus Group Discussion

For the focus group discussion with USAID Mission Proxies the following questions were used to guide the conversation.

1. Knowledge and information flows: Putting yourselves back in your Mission contexts, did you access new learning or information from USAID/W to use in your role? For example, did you use information from USAID/W when developing a Country Development Cooperation Strategy or Project Appraisal Document. Please feel free to describe an example.
2. Perceptions: Again, putting yourself back in your Mission context, what questions come to mind when you hear that PPL is developing a learning agenda? What questions should we anticipate from Missions about this effort? What will they be concerned about? What could help allay those concerns? What would exacerbate them? What might they be excited by?
3. Feedback on Content of PPL learning agenda:
 - a) Are you aware of or familiar with any current Washington based learning agendas? If so, what content has been most useful? Why or why not?
 - b) What are areas of inquiry you would encourage PPL to explore in its learning agenda that would be most helpful to inform Mission programming?
 - c) If know of existing learning agenda efforts, what areas do you think would be most complementary for a PPL learning agenda to focus on?
4. Participation: We are still trying to determine if and how best to engage Missions in the creation of this learning agenda. What suggestions do you have for how we might go about that? Have you had positive experiences participating in similar processes out of Washington? Could you tell us what made this a positive experience from your perspective?

ANNEX VII. CONTENT ANALYSIS OF DOCUMENTED LEARNING AGENDAS

CONTENT ANALYSIS OF DOCUMENTED LEARNING AGENDAS						
	NO. OF DOCUMENTS REVIEWED	NO. OF PAGES	NO. OF WORDS	NO. OF CATEGORIES, IF APPLICABLE	NO. OF QUESTIONS	TYPES OF DOCUMENT
BFS/Feed the Future	1	6	2613	6	29	Narrative report
DCHA/DRG	5	2 / 2 / 1 / 1 / 1	735 / 738 / 464 / 192 / 110	4 / 5	12	General Brochure for 2016, Updated Brochure for 2017, What We Know Infographic, Examples of Ongoing Research Infographic, DRG Process Infographic
DGP	3	167 / 19 / 3	70321 / 7984 / 868		2	Narrative report, website, executive summary, recommendations
Local Solutions	1	26	8668		3	Narrative report
HSS/MTE	1	12	4956		3	Narrative report
E3/FAB	1	15	2965		5	Narrative report
Average		21.25	8384.5		9	
Median		4.5	1740.5		4	

ANNEX VIII. LEARNING AGENDAS IN THE PRIVATE SECTOR

In line with the research conducted for this landscape analysis, PPL also analyzed the use of “learning agenda” in the private sector.

“Learning” and “learning organization” represent two linked but different business ideas in the private sector. Often, learning in the corporate world has become a synonym for training and personnel development with the creation of new positions such as chief learning officer. The concept of a learning organization derived from Peter Senge’s seminal *The Fifth Discipline*, which discusses the ways an organization can learn. The operationalization of such an idea is often reduced to four areas—company culture, developing people, leadership, and learning and knowledge processes—with emphasis usually on the first three and less focus on the fourth. Company culture, developing people, and leadership are connected to the importance of human capital in the modern business world. This is related to evidence that points to the critical actual and perceived importance of developing individuals to support business goals.²³

Etymology of “Learning Agenda”

The first documented use of learning agenda probably occurred in the early 1960s, with origins in the fields of education and business. The term was often used to describe a person’s path to learning, in a classroom or as a manager in a company, for example. Following more recent work on organizational learning in business, the concept of a learning agenda has become linked to idea of a “learning organization,” a term popularized by Peter Senge. This has included a more formal understanding of the role of a learning agenda to support learning in an organization. However, business use of learning agenda to describe an person’s pathway of learning is still common. This often involves building on the strengths of an individual (e.g., a leader or management executive) and filling in gaps in skills, knowledge, and/or experience.

In business, learning traditionally pertains to decision-making, R&D, and human resources, which frequently include learning components embedded within them. The most cited and famous example of a holistic approach to learning in an organization is the [Toyota Way](#). This embodies a philosophy that aims at undergirding the company and can be summarized in two key areas: *kaizen* (the philosophy of continuous improvement) and respect and empowerment for people. This is [connected](#) in the business world with the concept of [lean](#) manufacturing.

Learning is often integrated into a [CEO agenda](#). This often connects the company’s strategy with relevant learning. Learning is also commonly operationalized through reference to performance on [key performance indicators](#) in the same way that it can be connected in development to M&E plans.

Very few learning agendas are publicly available. (A recent example is [Accenture’s learning agenda](#) for a corporate responsibility initiative.) Instead, there is a focus on organizational learning models, such as

²³ According to the [15th Annual Global CEO Survey 2012: Delivering Results—Growth and Value in a Volatile World](#), “one in four CEOs said they were unable to pursue a market opportunity or have had to cancel or delay a strategic initiative because of talent constraints.” Furthermore, “[Global Talent Risk: Seven Responses](#),” a 2011 World Economic Forum report, describes the talent conundrum in stark terms: “Soon staggering talent gaps will appear in large parts of the world threatening economic growth. Economies will struggle to remain competitive while organizations will compete for talent on an unprecedented scale. Now, human capital is replacing financial capital as the engine of economic prosperity.”

after-action reviews.²⁴ In addition, there is a heavy emphasis on supporting individual learning, including [skills development](#), and supportive cultures with [experiential learning](#), a new focus of these types of programs.

²⁴ The most frequently discussed organizational learning model in the literature is the after-action or post-project review. This includes the Department of the Army's instructions in the "[Training Circular 25-20, A Leader's Guide to After-Action Reviews](#)." USAID issued similar guidance in a [Technical Guidance note](#) on after-action reviews.

ANNEX IX. LEARNING AGENDAS IN THE DONOR COMMUNITY

In line with the research conducted for this landscape analysis, PPL also analyzed the use of “learning agenda” by international development donors.

In general, among other major development donors there remains a dearth of references to learning agendas. One notable exception is the [BEAM Exchange learning agenda](#). The BEAM Exchange was launched in 2014 with initial 3-year funding from DFID and the Swiss Agency for Development and Cooperation. It brings experience and expertise across the fields of market systems development, M&E, impact evaluation, knowledge management, and community building. However, learning as an important concept in development manifests itself in two key ways. First, it is often associated with other trends, such as adaptive management, where learning is an integral component.²⁵ Second, the concept is appearing in donor policies and procedures ranging from full integration to inclusion in evaluation policies.

Often, donors have used the lens of adaptive management to assess and understand the effectiveness of programming and donor policies (e.g., the Norwegian Agency for Development Cooperation recent [evaluation](#) of how its programs fit the model of adaptive management and the German Agency for International Cooperation’s (GIZ) work in areas such as [climate change](#)). Beyond this, adaptive management has sparked interest in developing knowledge about its applicability and best practices. One recent example is the planned Global Learning for Adaptive Management program to support adaptive management in DFID and USAID programs by establishing a center for learning about adaptive management. In addition, donors have been focused on amending their own programmatic guidance to reflect the importance of learning within programs. For instance, USAID’s recent focus on in its ADS guidance on the importance of [CLA](#). This is also reflected in DFID’s [Smart Rules: Better Program Delivery](#), which provides the operating framework for its programs, including the use of evidence to inform its decisions.²⁶

Furthermore, donors also continue to focus on the role of evaluation and research to inform individual and organizational learning. While most of the implicit focus from donors is on the need to facilitate organizational learning, there is at least one example of a donor focusing on the role of supporting individual capacities to learn as part of an effort to create a learning organization: The Swedish International Development Agency (SIDA) has an [internal document](#) that looks at the role of creating a supportive learning environment for staff and the organization as a whole. This links individual practices and competencies with the creation of group and organization learning, encouraging practices, including the creation of learning plans.

The use of evaluations as sources of learning in donor organizations falls into three main groups. The first relates to understanding the role of evaluation in informing individual program- or project-level interventions. This includes guidance in evaluation policies or a manual describing the role evaluation can play in informing programming. This often involves guidance on how to employ evaluation for learning. This is similar to USAID’s recent [evaluation policy](#) that focuses on learning.

²⁵ Often, this is itself a response to a learning process in donor organizations for the need to learn from their own work and other related fields on more effective ways of doing business, such as adaptive management.

²⁶ Notably, many of these learning initiatives involve collaborative efforts between different international development donors.

The second group of organizations conducts strategic crosscutting or sector-level evaluations, such as the Danish International Development Agency’s evaluation studies, Australian Aid’s or SIDA’s Strategic Evaluations, or GIZ’s Corporate Strategy Evaluations. These references to specific types of strategic or thematic evaluations most closely approximate a learning agenda at a sector or thematic level. Also included in this group are organizations that conduct evaluations of processes or ways of doing business, such as GIZ’S [Capacity Works Management Model](#) or [Scaling Up](#); the World Bank’s [Doing Development Differently: Updating the plumbing to fit the architecture](#); DFID’s [From political economy analysis to doing development differently: A learning experience](#); or SIDA’s [Evaluation of the extent to which SIDA’s contribution management system is fit for purpose](#). These organizations also conduct evaluations for larger theories of change or sectors; these mostly cover areas that are of strategic importance to their agendas.

SIDA [Approach to Learning](#)

- Establish a learning plan based on a competence analysis that describes the areas the group wishes to study more closely
- Reserve time for joint reflection and dialogue concerning operations
- Document and systematize your own learning
- Find ways to tell other people about your work and create opportunities for dialogue and exchange of experience

The final—and least utilized—type of evaluation is through meta or analytical pieces based on multiple evaluations, such as the Canadian government’s Lessons from Development Evaluations, GIZ’s Cross-Section Evaluations, and SIDA’s assessment of the engagement in Afghanistan.

Furthermore, the connection between research and learning is less clear. This is in part due to the limited amount of information available through donors’ public websites. The most comprehensive research initiative this report found that relates to a learning agenda is the DFID [Research for Development](#) initiative, which focuses on three areas: develop new technologies and products such as drought-resistant crops and better drugs for malaria and neglected diseases; help DFID understand what development approaches work most effectively to improve the impact and value for money of spending on development; and improve DFID’s understanding of key development questions so it can make the best policy choices. Examples include predicting the onset of the West African rains, finding out why girls leave school early, and understanding causes and effects of corruption and how to address them.

The table that begins on the next page shows illustrative learning-related efforts in donor organizations.

ILLUSTRATIVE LEARNING-RELATED EFFORTS IN DONOR ORGANIZATIONS

NAME	EVALUATIONS	RESEARCH	ORGANIZATIONAL LEARNING	OTHER RESOURCES
DFID	Evaluation Strategy	Research for Development (R4D) initiative Research Review Report	<p>Thematic evaluations are commissioned by policy, regional, country or corporate teams to address evaluation priorities and evidence gaps that can be most effectively addressed across a number of projects or across a broad thematic area.</p> <p>In addition, Smart Rules lays out compulsory programmatic guidance, including the use of an Evidence Transparency Framework to assess evidence in the design process as well as focus on learning throughout the program cycle (see p. 93).</p>	Overseas Development Institute: Strengthening learning from research and evaluation: going with the grain ; Independent Commission for Aid Impact: How DFID Learns
Canadian govt.	Evaluation report, Evaluation Workplan		<p>Lessons from Development Evaluations, example from 2013</p> <p>Corporate and Thematic Evaluations are likely most relevant to learning agendas</p>	
SIDA	Evaluation Manual		<p>Learning described in evaluation manual on page 14. Strategic evaluations conducted by the Planning, Monitoring and Evaluation Unit are most relevant.</p>	Organization for Economic Cooperation and Development: Organizational Learning at SIDA - a twenty year perspective ; SIDA: Approach to Learning
AusAid	Evaluation Policy		<p>Strategic Evaluations conducted by the Office of Development Effectiveness are broad assessments of Australian aid that focus on key policy directions, specific development themes and sectors, or large programs (geographic or global). These evaluations highlight what has worked or not worked, and identify systemic issues that facilitate or constrain the effectiveness of Australian aid. They inform change in both strategy setting and operational practice, and assist in identifying new and innovative ways to deliver Australian aid</p>	
IrishAid	Evaluation reports	Research , including Programme of Strategic Cooperation		
GIZ	Learning from evaluations	Advisory Service on Agricultural Research for Development (BEAF) Approach	<p>Learning from evaluation process described in detail, including the use of Cross-section evaluations and Corporate strategy evaluations most relevant to learning agendas</p>	

ILLUSTRATIVE LEARNING-RELATED EFFORTS IN DONOR ORGANIZATIONS

Finland	Evaluation, Evaluation Policy	Connection to learning for individual programs on pages 8, 31, and 74 of the Evaluation Policy
Danish International Development Agency	Evaluation Role, Evaluation Policy Evaluation Studies	Learning from evaluations listed on page 10 of the Evaluation Policy.
Norwegian Agency for Development Cooperation	Evaluation, Evaluation Guide	Formative evaluations aim to improve the design or implementation and typically aim more directly towards the learning function.