DATE

AGENCY OR DEPARTMENT NAME

Authored by: Office or Team Name



Evidence Act Toolkit

Learning Agenda Workbook

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# Worksheet #1

The activity and series of tables below complement **Section 3** of *A Guide to Developing Your Agency’s Learning Agenda*.

### Table 1: Learning Agenda Core Team

|  |  |  |
| --- | --- | --- |
| Name | Role | Notes |
|  | Project Manager |  |
|  | Facilitator |  |
|  | Communications Lead |  |
|  | *Insert Subject or Method(s)* Subject Matter Expert |  |
|  | *Insert Subject or Method(s)* Subject Matter Expert |  |
|  | *Insert Subject or Method(s)* Subject Matter Expert |  |
|  | *Insert Subject or Method(s)* Subject Matter Expert |  |
|  |  |  |

# Activity 1

Use this activity to complete [**Table 2**](#_Table_2:_Stakeholder) on the following page. If you already filled out the Evaluation Officer Learning Journal during orientation, reference pages 25-27 for an additional stakeholder mapping activity that organizes stakeholders by level of influence and interest.

*Time needed*: 1-2 hours

*Materials needed:* White board or flip chart paper, sticky notes, markers

1. Convene the learning agenda core team in-person in a setting with either a white board or flipchart paper.
2. On the white board or flipchart, create vertical dividers for three stakeholder groups – internal, external (government), and external (non-government) – and four horizontal dividers – Responsible, Accountable, Consult, and Inform (RACI).
   * **Responsible:** Make final decisions on priority questions to be included in the learning agenda
   * **Accountable:** Provide learning agenda content and/or answer priority question(s)
   * **Consult:** Offer suggestions on priority questions, describe the current state of evidence, or explain challenges and mitigation strategies
   * **Inform:** Receive updates on learning agenda development and implementation
3. Provide each attendee with a marker and a pad of sticky notes.
4. Provide context on the activity – to brainstorm stakeholders who could be involved in the learning agenda development process.
5. Give attendees 10 minutes to think about the relevant stakeholders. They should draw or describe the stakeholder on a sticky note (one stakeholder per sticky note). A stakeholder could be a specific role (e.g., Chief Operating Officer), other federal agencies, or an external organization.
6. Add the stakeholders to the appropriate section of the white board or flipchart.
7. Once all stakeholders have been added, facilitate a discussion on each RACI category and strategies for engaging each group. Add or remove sticky notes as needed.
8. Fill out [**Table 2**](#_Table_2:_Stakeholder) with the stakeholders agreed upon by the team.

### Table 2: Stakeholder Matrix

**Internal Stakeholders**

|  |  |  |
| --- | --- | --- |
| Title/Organization | RACI Category | Notes |
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**External Stakeholders (Governmental)**

|  |  |  |
| --- | --- | --- |
| Title/Organization | RACI Category | Notes |
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**External Stakeholders (Nongovernmental)**

|  |  |  |
| --- | --- | --- |
| Title/Organization | RACI Category | Notes |
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# Worksheet #2

This section provides guidance on sample meeting topics and agenda items to facilitate stakeholder engagement activities. Use the sample topics listed below to complete the meeting agenda template on the following page.

**Sample Purpose and Intended Outcomes of the Meeting**

* Educate stakeholders on the concept of a learning agenda
* Discuss the current state of evidence on a specific topic
* Brief stakeholders on the status of learning agenda development
* Obtain input on potential priority questions for the learning agenda
* Establish processes for ongoing communication loops

**Sample Discussion Topics**

* An overview of the purpose and benefits of a learning agenda
* Document ongoing evidence-building activities
* Suggestions for new evidence-building activities
* Document available data, tools, methods, and analytic approaches
* Review of what has been learned from a specific evidence-building activity
* Body of available evidence on a specific topic
* Brainstorm questions on strategic goals or objectives
* Brainstorm questions on an individual or organization’s priorities
* How to use questions to inform decision-making

See [**Worksheet #4**](#_Worksheet_#4:_Writing) for more information on the required components of a learning agenda, including learning activities and potential data, tools, methods, and analytic approaches.

**Meeting Tips**

* *Identify participants.* Determine who will be at the meeting and their roles.
* *Be prepared.* Consider how you would like participants to prepare for the meeting, particularly for a brainstorming session. Be sure to send out any relevant questions or other materials in advance.
* *Assign a facilitator.* The learning agenda development process will include many meetings. It is important to stay on topic, guard against distractions, and ask good questions.
* *Make effective use of technology.* When brainstorming, consider electronic submissions of ideas and questions. To reach a diverse geographic audience at low cost, consider options such as video conferencing or webinars.
* *End with actions.* Explain to stakeholders what you are going to do with the information you received in the meeting.
* *Follow up*. Let stakeholders know their voices have been heard. Share meeting notes and tell stakeholders when their ideas result in approved learning agenda content.

### Meeting Agenda Template

|  |  |  |  |
| --- | --- | --- | --- |
| **Meeting Information** | | | |
| **Meeting Title** |  | **Date & Time** |  |
| **Participants** |  | | |
| **Meeting Lead** |  | **Facilitator** |  |

|  |  |
| --- | --- |
| **Meeting Purpose** | |
| **Purpose** |  |
| **Desired Results** |  |

|  |  |  |
| --- | --- | --- |
| **Meeting Agenda** | | |
| **Time Allocated** | **Discussion Item** | **Notes & Resources** |
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# Worksheet #3

Use [**Table 3**](#_Table_3:_Interim) and [**Table 4**](#_Table_4:_Recurring) to create timelines for the development of the interim learning agenda, and for the recurring four-year cycle to continually update and refine the learning agenda.

**Questions to Consider for Interim Learning Agenda Development**

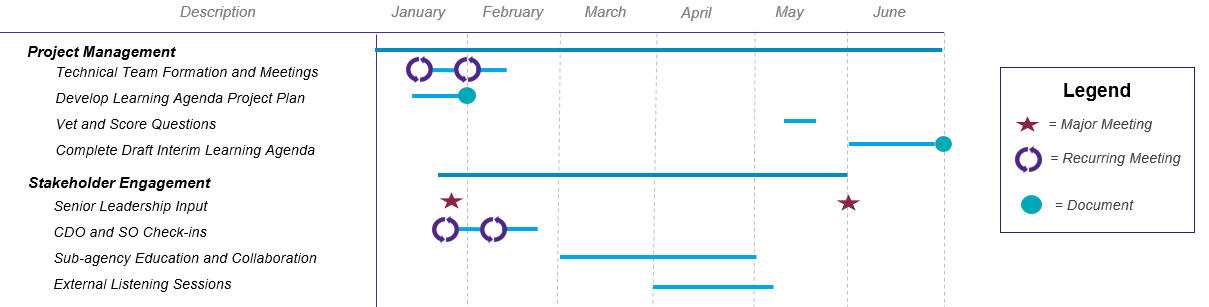
* How often will the learning agenda core team meet, if applicable?
* When does the interim learning agenda need to be completed?

*Note: The learning agenda priority questions are needed to inform the Annual Evaluation Plan. The interim Annual Evaluation Plan will be published with the Annual Performance Plan (APP) and Report (APR). Consider your agency’s APP/APR review timeline when determining how much time is needed for the Annual Evaluation Plan.*

* Will our team take a top-down, bottom-up, or blended approach to developing a set of priority questions?
* What mix of the following items is most appropriate to align our agency’s interim learning agenda to?
  + Fiscal Year 2018-2022 Strategic Plan
  + Unified Agenda of Federal Regulatory and Deregulatory Actions
  + Current departmental and Secretarial priorities (such as Cross-Agency Priority Goals on workforce development or customer experience)
  + Other Items that will remain consistent across leadership teams
* What existing information and reports could be leveraged as inputs to the interim learning agenda?

**Sample Timeline to Complete Draft Interim Learning Agenda by July 2020**

In the timeline below, the learning agenda core team hosts bi-weekly meetings. The team engages senior leadership early in the process and determines that they are interested in reviewing draft priority questions by June 1. Sub-agency and external engagement leads to a series of draft questions, which the team vets and scores before presenting to leadership.



**Additional Questions for the Four-Year Cycle Timeline**

* How will the capacity assessment inform learning agenda development?
* How will the timeline inform desired benefits of the learning agenda? *See* ***Section 1*** *of A Guide to Developing Your Agency’s Learning Agenda*.
* Which major plans have the strongest connection to the learning agenda? Will the learning agenda serve as an input to these plans, use information from the plans, or both? *See* ***Section 5*** *of A Guide to Developing Your Agency’s Learning Agenda*.
* If conducting surveys or hosting advisory meetings, will my activities be subject to the Paperwork Reduction Act or Federal Advisory Committee Act?
* What is our agency’s internal review process for the Strategic Plan? How does the timeline impact when the learning agenda must be completed?
* Will our agency form an Evidence Community of Practice? If so, will it play a role in continuous updates to the learning agenda? *See* ***Section 8*** *of A Guide to Developing Your Agency’s Learning Agenda*

### Table 3: Interim Learning Agenda Process

**Project Management**

|  |  |  |  |
| --- | --- | --- | --- |
| Meeting Purpose | Attendees | Date | Notes |
| Core Team Meetings | Core 6-person team | Bi-weekly | Recurring team meetings to discuss learning agenda development |
| Learning Agenda Kick-off | EO, CDO, SO, PIO | 1/17/2020 | Discuss CDO, SO, and PIO involvement in the learning agenda |
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**Stakeholder Engagement**

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| --- | --- | --- | --- |
| Audience | Meeting Type | Date | Notes |
| Academic Community | Listening Session | 3/5/2020 | Discuss the evidence base related to a specific research topic |
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### Table 4: Recurring Learning Agenda Process

**Project Management**

|  |  |  |  |
| --- | --- | --- | --- |
| Meeting Purpose | Attendees | Date | Notes |
| Core Team Meetings | Core 6-person team | Bi-weekly | Recurring team meetings to discuss learning agenda development |
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**Recurring Stakeholder Engagement**

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| --- | --- | --- | --- |
| Audience | Meeting Type | Date | Notes |
| Sub-Agency Representatives | Annual Review of Evidence | October | Discuss progress on answering priority questions |
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**Integration with Existing Plans and Activities**

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| --- | --- | --- | --- |
| Plan / Activity | Purpose | Key Date(s) | Action |
| PMIAA Strategic Plan | To improve program/project management | September | EO and PMIO discuss use of evidence in the annual portfolio review |
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# Activity 2

For the following series of tables and activities, please download the Excel file that complements Section 6 of *A Guide to Developing Your Agency’s Learning Agenda*. These tables can be used to score, refine, balance, and categorize questions based on stakeholder input.

Table 5 (“Review and Refine” tab)

This table contains a few examples of criteria that can be used to score your questions.

* + Use the criteria in the table as a model to create your own criteria.
  + In Table 6, enter up to five criteria to score each question.

Table 6 (“Review and Refine” tab)

* + Complete this chart by adding the potential questions to the “Question” column.
  + Add up to five criteria in the following columns and score each question according to the guidelines you established in Table 5.
  + After scoring each question, use the filters on the criteria to sort questions by total score, or score in a particular category.
  + Revisit questions that are low- or mid-scoring according to your team’s judgment.
  + Consider ways to refine the question to be a stronger priority question.

Table 7 (“Balance Check” tab)

This table can be used to balance-check the list of priority questions to ensure that the mix is appropriate based on [OMB M-19-23](https://www.whitehouse.gov/wp-content/uploads/2019/07/M-19-23.pdf) guidance and your agency's unique situation. The table includes suggested and required categories.

* Input the list of refined questions from **Table 6** into the “Priority Questions” column in this table.
  + Encourage your team to pick and choose the categories that are most appropriate and important for your agency. Add or delete as many columns as necessary.
  + For each question, use the drop-down menu to mark an “X” in the relevant categories.
  + At the bottom of the table, review the calculation of the number of questions that fit each category.
  + Consider whether the mix of questions is reflective of agency priorities and stakeholder input.
  + If the mix of questions does not seem appropriately balanced, revisit any themes or questions that may have been previously removed from this process.

*Note:* *The balance of questions in each category does not need to be 1:1. Consider the mix and balance that is appropriate for your agency's structure, priorities, and capacity.*

Table 8 (“Supporting Information” tab)

The purpose of this activity is to help Evaluation Officers (EOs), their core team, and/or related staff map their agency’s priority questions to the required components of a learning agenda, per [OMB M-19-23](https://www.whitehouse.gov/wp-content/uploads/2019/07/M-19-23.pdf). This table can be used to complete [Activity 3](#_Activity_3:_Designing). Information should be validated by the Chief Data Officer and Statistical Official.

* *Priority Questions to be Answered:* Automatically populated in Column B.
  + *Which Strategic Goals and Objectives that the Learning Agenda Will Address:* It is not a requirement to organize questions by strategic goals. This exercise helps the EO and related staff see holistically which goals are addressed by the set of questions.
  + *Activities that the Agency will Engage in to Address Priority Questions:* Refer to stakeholder meeting notes for ongoing and planned evidence-building activities to complete Columns H and J.
  + *Timing of Learning Agenda Activities:* In Columns I and K, insert the expected timeframes for ongoing and planning evidence-building activities for each question.
  + *Potential Data, Tools, Methods, and Analytic Approaches to be used to Answer Priority Questions:* In Columns M through P, document the resources needed to answer each question.
  + *Anticipated Agency-Specific Challenges and Proposed Solutions to Developing Evidence to Support Agency Priorities:* Document anticipated challenges to answering each question in Column R and mitigation strategies in Column S

# Activity 3

For this activity, please download the *Activity 3 Supplement* for **Section 6** of *A Guide to Developing Your Agency’s Learning Agenda.* This template serves as one example of how a learning agenda core team could facilitate a discussion on potential priority questions.

**Agenda (Slide 2)**

* Before presenting draft priority questions, it may be necessary to provide context on your team’s process.
* Depending on your approach to senior leadership engagement, you might need to add a refresher on “What is a learning agenda?” and Evidence Act requirements.

**Stakeholder Engagement Process (Slide 3)**

* Edit and fill in the overview of stakeholders, engagement methods, and results.
* In your talking points, consider speaking to a few limitations or challenges in stakeholder engagement. This may include survey bias or disproportionate input from stakeholder groups (e.g., 95% academia, 5% non-profits).

**Developing Priority Questions (Slide 4)**

* + In your talking points on the team’s vetting process, give examples of criteria used and why they were selected. Reference **Table 5** in [**Activity 2**](#_Activity_2:_Forming).
  + When mentioning relevant goals and priorities, reference conversations with senior leadership. Repeat goals and priorities they have communicated to the learning agenda core team.  Reference **Table 7** in [**Activity 2**](#_Activity_2:_Forming).

**Question Categories (Slide 5)**

* + As described in **Section 6**, there are a variety of ways to categorize priority questions (e.g., by strategic goal, focus area, or question type).

**Potential Priority Questions (Slide 6)**

* + Duplicate this slide for the number of categories.
  + Fill in the table to the left with potential priority questions.
  + Reference the Capacity Assessment, stakeholder meetings, and existing documentation to complete the box on learning activities.
  + When documenting alignment to strategic goals and other priorities, note that the category and set of questions may map to multiple goals or priorities.
  + Document learning activities using **Table 8** in [**Activity 2**](#_Activity_2:_Forming) and refer to the other columns (e.g., anticipated challenges) when drafting your talking points.

**Next Steps (Slide 7)**

* + Consider including a timeline of your agency’s next steps: writing, reviewing and approving, and disseminating the learning agenda to internal staff and OMB. Additionally, consider adding the timeline for the Annual Evaluation Plan process.
  + In your talking points, note areas where future leadership involvement will be useful. Stakeholder engagement should be ongoing, and this could be an opportunity to invite senior leadership to a listening session or conference.

# Worksheet #4

Below is a template to guide the writing of your agency’s learning agenda. See **Section 7**of *A Guide to Developing Your Agency’s Learning Agenda* for a sample learning agenda and additional guidance on the template below. You can also use the inputs from **Table 8** in [**Activity 2**](#_Activity_2:_Forming) to help you complete this template. There is no prescribed or endorsed learning agenda style or format – please design a learning agenda format that best fits your agency’s needs.

This template contains required and optional components of a comprehensive learning agenda. You should arrange the pieces in the order that makes sense to you, including using different headings. However, it is important to ensure all required components are included.

|  |
| --- |
| **FY [Years Covered – Agency Name] Agency Learning Agenda** |
| **Overview**  Insert a very brief introduction about the agency’s learning agenda aims. Refer to **Section 1** of *A Guide to Developing Your Agency’s Learning Agenda* and associated handouts for more information.  Insert an overview of the agency’s stakeholder engagement efforts (process and participants), and how internal and external engagement informed the questions included in the learning agenda. Emphasize stakeholder engagement required per the Evidence Act – the public, State and local governments, and representatives of nongovernmental researchers.  Include a brief explanation of how your agency defines “short-term” and “long-term” questions included in the learning agenda. |

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| **Focus Area #1**  *Note: Organizing by focus area is optional. You may choose to take a different approach.*  **Required:** Strategic goals addressed in this section  **Optional:** Other priorities addressed in this section  **Required:** Priority questions relevant to that focus area  **Optional:** Brief explanatory text that would help readers understand the priority question, including background information or details  **Strongly Encouraged:** If the question is related to a regulatory action, reference the entry in the Unified Agenda of Federal Regulatory and Deregulatory Actions |
| **Required: Activities that the Agency will Engage in to Address Priority Questions**  For each priority question, briefly describe the ways in which your agency will seek to answer that question. This description can be high-level, as the potential methods and analytic approaches will be described below. Consider combining the sections if necessary. |
| **Required: Potential Data, Tools, Methods, and Analytic Approaches to be Used to Answer Priority Questions**  This section should briefly expand on the learning agenda activities discussed above by providing more details about potential data sources, tools, methods, and/or approaches that may be used to answer each question. Note the importance of the word “potential” here, as your agency may be just starting the process of identifying how priority questions will be answered. Existing capacity to answer a priority question is not a prerequisite for inclusion. Where capacity exists, agencies are expected to use the most rigorous methods possible to answer priority questions.  To demonstrate compliance with existing laws and regulations, consider including a brief explanation of the agency’s data governance related to the potential data sources listed.  *Note*: *The Annual Evaluation Plan will provide additional detail on method(s) to be used.* |
| **Required: Timing of Learning Agenda Activities**  In this section, briefly describe the timeframe for the activities above. For example, will these activities take place over the next year or span multiple years? If there are several activities associated with one priority question, describe the timeframe for each. |
| **Required: Anticipated Agency-Specific Challenges and Proposed Solutions to Developing Evidence to Support Agency Priorities**  Briefly preview one or more of the challenges in undertaking the activities described above. These could be challenges specific to an individual question or broader agency challenges. For each challenge, document a proposed mitigation strategy. |
| **Optional: Learning Agenda Updates**  Per the Evidence Act, agencies are required to revisit the learning agenda on a minimum of an annual basis. Include an explanation of the process and stakeholders involved in making meaningful updates to the learning agenda. |