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BHA Learning Agenda Worksheets

This document provides three worksheets, each containing a set of questions which should be asked at the start of the learning agenda development process.

The worksheets correspond with the steps described in the BHA Learning Agenda Brief and are intended to be used as a planning guide. The worksheets can also be used as tools to track and keep a record of decisions made and actions to be taken. Though you will return to these questions throughout the process of developing a learning agenda, carefully considering all the questions at the outset helps to ensure that needs and challenges are anticipated from the start.

Worksheet 1: Framing the Learning Agenda and Ensuring Strategic Alignment

A learning agenda is a set of broad questions directly related to the work that an operational unit conducts.[1] From the start, it is important to clearly define the strategic focus of your learning agenda in relation to the work conducted by the relevant unit. The questions in Worksheet 1 will help you define the span and scope of relevant evidence and identify the stakeholders and resources needed to develop your learning agenda.

FACTORS/QUESTIONS FOR CONSIDERATION	RESPONSE
The **geographic focus** defines whether your learning agenda will be relevant globally or will have a regional focus, and whether it will be focused more narrowly on sectoral or cross-cutting work within a specific country context or at the activity level.	
● Will the focus be global or regional? If it is not global, what regions, countries, or sub-national regions will this learning agenda cover?	
The **topical focus** will identify the particular sectors or sub-sectors, cross-cutting or thematic issues.	
● What sector(s) or subsector(s) will this learning agenda address? What will be the topical focus?	
The **strategic focus** will identify and frame strategies, policies, sets of operational or technical priorities, program designs, and other guiding documents that help to circumscribe the universe of relevant evidence.	
● What guiding documents frame the learning agenda? What	

[1] Learning agendas align policy priorities with learning activities by providing a framework for coordinating evidence generation across different operational units. Learning agendas can be developed for any level, whether organization-wide or, in the case of USAID, at the level of a bureau (USAID's major organizational units in Washington) or geographic or functional office, mission, team, cross-cutting theme, sector, or activity.

are the specific goals and objectives that the learning agenda will address? *(List documents and particular objectives)*	
• Will the learning agenda feed into higher-level MEL plan(s) and/or other learning agenda(s)? If so, which ones? *(List documents)*	
The **purpose** will identify whether the learning agenda's focus is on new scientific evidence, implementation pathways, or whether it will provide a better understanding of context or identify process improvements.	
• What is the purpose of this learning agenda?	
• What sources or processes (research or other learning process(es)) will be needed to generate evidence to achieve the articulated purpose? For example, will the learning agenda require impact evaluations and systematic reviews, primary studies in a sector or subsector, or might it involve process monitoring or after action reviews to generate evidence for process improvements? *(Though you will return to questions of methods throughout the process of developing your learning agenda, it is useful to identify the way in which evidence will be generated at this stage.)*	
The geographic span, institutional context, and purpose of a learning agenda may have implications for later planning. It is useful to consider the **time frame** of a learning agenda during the planning stage.	

● How early will you need to begin to plan to carry out this learning process?	
● What will shape or govern the timeframe for the learning agenda? (*Does it expire? How often might the learning agenda need to be revised or updated?*)	
Identifying a learning agenda's **stakeholders** helps to ensure that they are able to participate in a structured and productive fashion.	
● What operating units/teams will own/drive the process?	
● Who are the end-users?	
● What input from stakeholders will be needed to frame the learning agenda? ○ Subject matter expertise ○ Methodological expertise	

○ End users ○ Others?	
● How will stakeholder input be solicited? What roles will stakeholders occupy? How will core decision makers be identified and come to consensus or reach collective decisions on the basis of stakeholder input? ● How will stakeholder contributions be documented?	

Worksheet 2: Mapping the Evidence and Developing Lines of Inquiry

Developing lines of inquiry requires mapping already existing evidence to identify gaps. The questions below will help you plan out the process for mapping this evidence and identifying gaps that still need to be addressed with new lines of inquiry. These questions can also help you determine the resource implications of the research and learning process(es) identified above.

FACTORS/QUESTIONS FOR CONSIDERATION	RESPONSE
Identifying the **boundaries of evidence** relevant to your learning agenda is the first step toward identifying relevant sources (including both completed and ongoing studies and reviews) and will help you to plan mapping and gap identification exercises.	
● Can a large body of evidence be broken down into smaller areas of inquiry, such as thematic, sectoral, programmatic, or operational domains? (*What key programmatic or operational approaches or pathways identified in Worksheet 1 anchor the evidence mapping exercise?*)	
● What are the sources of evidence to be included in the evidence mapping exercise? What are your inclusion and exclusion criteria? (*For example, will we need to map out evaluations, academic research, operational or formative research studies, monitoring data, or other information?*)	
● Where can the relevant evidence be found? (*Can it be found in an existing repository or dispersed across stakeholders?*) Has an evidence mapping exercise for this span and scope already been carried out?	

● What stakeholders should be engaged to carry out the process of bounding relevant evidence? ○ Practitioners ○ Subject matter experts ○ Others?	
Mapping out **existing evidence** helps to reveal the landscape of what we know.	
● How will evidence be located, extracted and captured? What approaches will be needed? (*Will the methods needed to map evidence require systematic or rapid reviews, and/or require assembling a panel of experts, or interviewing experts or practitioners?*)	
● What stakeholders should be engaged to carry out the evidence mapping exercise? Are there specific institutions or individuals with relevant knowledge of the evidence base in question? ○ Subject matter expertise ○ Methodological expertise ○ Others?	
● Thinking through the process of evidence mapping, what resources (*time, staff and stakeholder, budgets, mechanisms to work through, etc.*) will be needed to carry it out?	
● How early will you need to begin planning to carry out this evidence mapping exercise?	

Once existing evidence is mapped, you can **identify where evidence gaps exist**. These gaps may later anchor your lines of inquiry.	
• Who will contribute to the identification of gaps in the evidence base? This stakeholder group may be a mix of: ○ Researchers ○ Practitioners ○ Methodological experts	
• How will evidence gaps be identified? What approaches will be needed to identify evidence gaps? What approach will resources allow? (*Will the methods needed to identify evidence gaps require a formal gap map or analysis, require interviewing experts or practitioners, or rely on group dialogue or roundtable discussions?*)	
• How will the evidence gaps that emerge be captured and shared?	

Worksheet 3: Prioritizing and Documenting Lines of Inquiry

The questions below lay out a framework for determining the usefulness and relevance of addressing particular evidence gaps (identified in the previous step) and for prioritizing these areas of inquiry. While processes carried out at different institutional levels and with different evidence, aims, and stakeholders will be different (and more or less complex), these questions can help you plan to navigate the process of prioritizing lines of inquiry.

<table>
<tr><th>FACTORS/QUESTIONS FOR CONSIDERATION</th><th>RESPONSE</th></tr>
<tr><td colspan="2">To ensure the usefulness/relevance of the lines of inquiry emerging from the evidence gap analysis, consider how each one will fall within the intended span and scope of the learning agenda. Remove those that are not aligned.</td></tr>
<tr><td>● How will you gather input to determine the usefulness/relevance of specific evidence gaps that have been identified (i.e. survey, roundtable discussion) in order to begin to prioritize those gaps?
● What questions will you need to ask to make these determinations? For example:
o How does this line of inquiry address the evidence gap(s) identified above?
o What specific results (defined in institutional plans, strategies, results frameworks, goals, theories of change, objectives, etc.) would be supported by addressing questions under this line of inquiry?
o If this line of inquiry is addressed, will the answer allow us to take any specific action? (For instance: will it help us improve a process, program design, or better understand a context?)</td><td></td></tr>
<tr><td>● What stakeholders will be involved in determining the usefulness and relevance of identified lines of inquiry and how will they be engaged?</td><td></td></tr>
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- Practitioners - Subject matter experts - End users - Others ● How will stakeholders be sufficiently informed on the span and scope of the learning agenda so that they can make informed decisions?	
● Where can the relevant evidence be found? (*Can it be found in an existing repository or dispersed across stakeholders?*) Has an evidence mapping exercise for this span and scope already been carried out?	
● How will stakeholders contribute to, agree on, and/or help to decide on the lines of inquiry?	
Plan to identify and remove lines of inquiry that can not be **feasibly** answered or where resources that would be needed to address the line of inquiry are not available.	
● What stakeholders do you need to consult to ensure questions can be answered feasibly within available time and resources? How will they be engaged?	

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- How will you determine whether available resources are sufficient to address this line of inquiry? (*Answer for each.*)
  - Staff LOE
  - Data sources (primary, secondary, tertiary)
  - Time
  - Funds
  - Institutional capital

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- Are there any factors you will need to consider that may make it challenging to answer questions under this line of inquiry?

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<tr><td colspan="2">Making sure that lines of inquiry are stated clearly will help you to ensure that different readers will understand the questions in the same way.</td></tr>
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- How will you ensure that the line of inquiry is stated in a manner that can be understood in the same way by multiple stakeholder groups? What stakeholder groups will be involved in making this determination? What review process will be used? (*Hint: Can you paraphrase it while preserving its meaning?*)

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- Where and how will you document or define key terms that could have multiple meanings or varied interpretations?

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<tr><td colspan="2">Prioritizing questions that are relevant and feasible with input from a wide range of stakeholders will help to ensure that the learning agenda reflects the priorities identified by its span and scope.</td></tr>
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● What stakeholders will be involved in prioritizing lines of inquiry and how will they be engaged? o Practitioners o Subject matter experts o End-users o Senior leadership o Others	
● How will stakeholders be sufficiently informed on the lines of inquiry that have been selected to contribute to determining their prioritization?	