

# Framing Your Learning Agenda

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The Evidence Act established a requirement for learning agendas across the Federal government. Implementing learning agendas can be a daunting task. Here we look at how using a business process model (BPM) can provide structure to the effort. A BPM does not replace best practices for designing a learning agenda. Instead, it gives an agency a framework to seamlessly put learning agenda best practices in place.

## WHAT IS A BUSINESS PROCESS MODEL?

A BPM is a way to organize an agency's workflow when creating and implementing their learning agendas and evaluation plans. While there are many BPMs, here we look at a modified version of the Generic Statistical Business Process Model (GSBPM).

The GSBPM has the necessary flexibility to:

- Describe and define the set of business processes needed to produce learning agendas and evaluation plans,
- Provide a standard framework and harmonized terminology,
- Integrate different components of evidence, and
- Support learning agenda and evaluation plan quality assessment and improvement.



Figure 1 Learning Agenda and Evaluation Plan Process  
(From OMB M-19-23)

A learning agenda depends on the identification and setting of priorities for evidence building, including the development of annual evaluation plans. During the early steps of a learning agenda, agencies engage relevant stakeholders, identify their priority questions, and write the learning agenda (see Figure 1). The framework of the GSBPM can be used to build in important touchpoints for an agency during these early steps of the learning agenda. In this first in a series of white papers, we will take you through an application of the GSBPM in these early steps.

## INCORPORATING STAKEHOLDER ENGAGEMENT

In [an earlier article](#), we discuss stakeholder engagement and the importance of authentic buy-in. It is important to engage stakeholders early and keep them engaged throughout learning agenda activities. Stakeholder engagement from the start will lead to questions that are relevant and meaningful to agencies and to a learning agenda that will resonate with stakeholders.

## FRAMING ACTIVITIES AND EMBEDDING QUALITY CHECKS

The strength of the GSPBM is that it provides clear steps for an agency's workflow. Here, we have adapted one part of that workflow and describe it below as six activities. These activities can be performed sequentially, or iteratively if previous steps need to be revisited.

We also embed quality check questions that align to each of those activities to help you along. The quality checks help to ensure the learning agenda is meeting stakeholder needs within constraints imposed by legal requirements, resource limitations, etc. You may find additional questions are also suited to your quality needs.

### Six Early Activities

1. Determining priority questions
2. Confirming priority questions
3. Establishing output objectives
4. Finalizing priority questions
5. Checking evidence availability
6. Writing the learning agenda

### Determining Priority Questions

With a stakeholder engagement strategy in place, you will identify your priority questions in a transparent, iterative process. That process begins with determining what the priority questions should be by involving stakeholders in the exploration of broad questions and evidence needs.

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#### Quality Check 1: Determining Priority Questions

- To what extent have stakeholders been identified and included in discussions about learning agenda needs?
  - To what extent has relevant supporting documentation been gathered?
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### Confirming Priority Questions

As questions are refined, you will engage stakeholders to confirm the relevance and utility of those polished questions.

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#### Quality Check 2: Confirming Priority Questions

- To what extent have stakeholders confirmed the detailed learning agenda needs?
  - To what extent do the priority questions satisfy the information demands?
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### Establishing Output Objectives

Another important step in shaping the priority questions is establishing output objectives. Although they can be general, output objectives ensure your priority questions are clearly linked to long-term

expectations. This activity also provides an opportunity to think through legal and resource limitations that will help avoid stumbling blocks down the road.

### Quality Check 3: Establishing Output Objectives

- To what extent have legal constraints been considered?
- To what extent have the learning agenda needs been addressed by the proposed outputs?
- To what extent are the proposed outputs and their quality measures suitable?
- To what extent have resource requirements for the proposed outputs and their quality measures been considered?

## Finalizing Priority Questions

With output objectives established, you can now refine and finalize your priority questions. Finalized priority questions should include some granularity that will help direct how evidence can be used to answer them.

### Quality Check 4: Finalizing Priority Questions

- To what extent have all evidence variables been precisely defined? For example, personal income variables on different datasets can include/exclude some income sources – be clear what exactly is included to avoid misinterpretation.
- To what extent have all the priority questions from the previous steps been addressed?
- To what extent have stakeholders confirmed the finalized priority questions?

## Checking Evidence Availability

With these priority questions in hand, you can now check evidence availability. Here, the GSBPM provides a framework for reviewing learning agenda requirements, the conditions under which evidence is available, use restrictions, and an assessment of possible data alternatives. An example for determining evidence availability is shown in Figure 2.

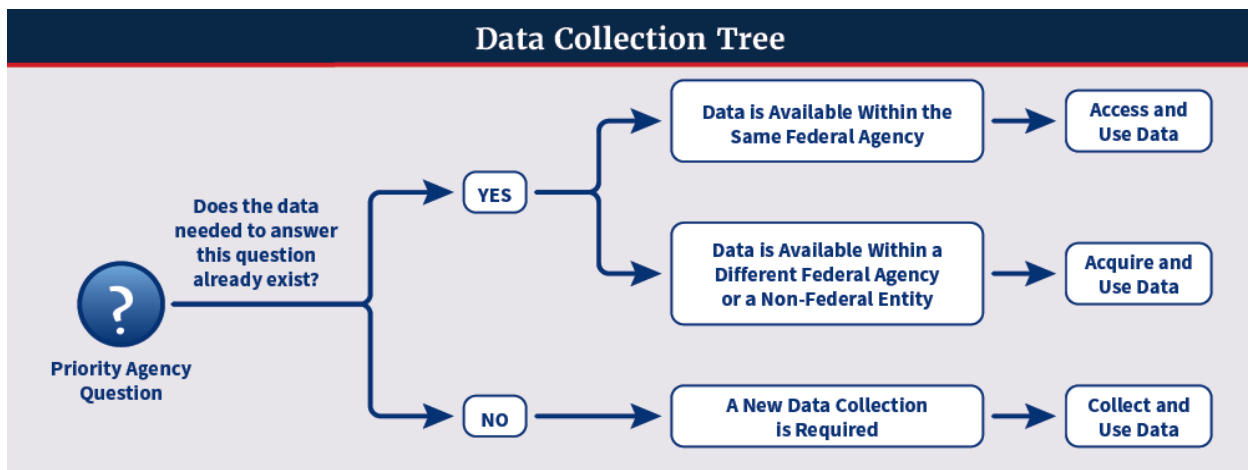


Figure 2 Example for how an agency can determine evidence needs (From the [Federal Data Strategy](#))

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### Quality Check 5: Checking Evidence Availability

- To what extent have legal constraints regarding evidence collection, acquisition and use been assessed and any necessary changes been proposed?
  - To what extent do current evidence sources meet the learning agenda requirements, taking into consideration the conditions under which they would be available and any restrictions on their use?
  - Is a contingency plan for changes to the evidence or evidence source in place?
  - What is the completeness and quality of the evidence sources?
  - To what extent does the timeliness of the delivery detract from its relevance?
  - Is the evidence source cost effective?
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## Writing the Learning Agenda

Now that priority questions have been identified, it is time to write the learning agenda. The learning agenda will articulate the following:

- strategic goals and objectives,
- the priority questions you've identified,
- how priority questions will be addressed,
- the timing of learning agenda activities,
- the potential data, tools, methods, and analytic approaches that will be used, and
- any agency-specific challenges and solutions related to developing evidence.

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### Quality Check 6: Writing the Learning Agenda

- To what extent have resource requirements for the proposed outputs and their quality measures been considered?
  - To what extent does the learning agenda reflect the findings, recommendations, and proposals from the preceding steps?
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## CONTINUING A BUSINESS PROCESS MODEL

In subsequent white papers, we will examine how the GSBPM can be used to support evaluation plans. These evaluation plans should, among other things, spell out how an agency will address its learning agenda. The GSBPM provides a framework for creating, implementing, and updating learning agendas and evaluation plans. We will discuss how OMB's new Phase 4 guidance can be incorporated into the GSBPM framework, as well as how to integrate the Paperwork Reduction Act and the Information Quality Act.

## RESOURCES

General Services Administration (GSA), Office of Evaluation Sciences (OES). (2020). Evidence Act toolkit. A guide to developing your agency's learning agenda. Washington DC.

[https://oes.gsa.gov/assets/toolkits/A\\_Guide\\_to\\_Developing\\_your\\_Agency's\\_Learning\\_Agenda.pdf](https://oes.gsa.gov/assets/toolkits/A_Guide_to_Developing_your_Agency's_Learning_Agenda.pdf)

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OMB. (2020). 2020 Federal Data Strategy action plan. <https://strategy.data.gov/action-plan/#action-1-identify-data-needs-to-answer-priority-agency-questions>

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## RESEARCH AND EVALUATION AT TREWON

Trewon's Research and Evaluation team is comprised of a range of experts with decades-long experience supporting government clients in all aspects of research and evaluation support services, such as developing learning agendas and evidence plans, implementing the Federal Data Strategy, facilitating stakeholder engagement, designing valid and reliable quick turnaround studies, collecting and analyzing data, providing technical assistance, developing engaging reports, and fostering a culture of learning and continuous improvement. Our clients include the National Science Foundation, the National Center for Science and Engineering Statistics, the Department of State, the Department of Justice, the Department of Defense, City Gate Foundation, and the Center for Medicare and Medicaid Services.