Learning Agenda Template

INNOVATION NETWORK
Transforming Evaluation for Social Change

Acknowledgements

Innovation Network has provided evaluation and strategy expertise in systems change to the nonprofit and philanthropic community for 30 years. We are committed to equity in all our projects and have been a leader in building the field of advocacy evaluation since 2005.

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Thank you for learning with us.

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Introduction

The purpose of a learning agenda is to connect learning and evaluation to strategy and decision-making. A learning agenda is intended to unite participants around common questions that the group is grappling with and invites curiosity and inquiry. The Emergent Learning Community Project describes it well: "A learning agenda maps out a plan to learn as much as we can from our own work in real time around a question that matters to us. A Learning Agenda helps us pose a "What will it take…?" question, identify the work related to that question, express our best starting thinking, plan to experiment around that work, track the results, and adjust our thinking over time, stopping occasionally to reflect on what we've learned so far, in order to adjust our approach and improve our results."

At Innovation Network, we see ourselves as facilitators of a learning journey, where evaluation, learning, and capacity strengthening are interconnected. We believe in learning that is iterative, consistent, and actionable, and we often co-develop learning agendas with clients and other partners. **We have developed this guidance based on how we approach developing a learning agenda, complemented by our experience incorporating Emergent Learning practices and principles into our work**. Some of our team members have been trained in Emergent Learning (EL), and we thought it would be helpful to share a practical application of how you can implement EL practices as part of a learning agenda process. This is just one way to go about creating a learning agenda. **Learning agendas should be flexible and iterative and support your learning needs.**

A learning agenda maps out a plan to learn.

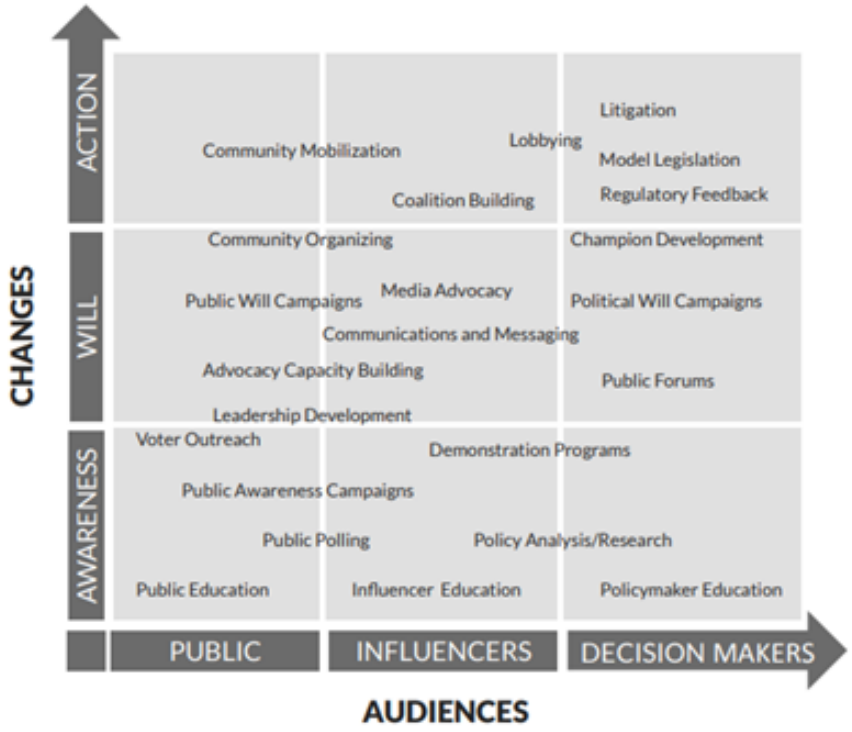
This guide is designed for anyone in the social sector who wants to be more intentional about learning and includes some specific support and guidance for people doing advocacy and systems change work, based on our experience supporting advocates to learn from their work.

Learning about Advocacy

Frameworks can be helpful tools to ground your learning, allowing you to organize your learning, ensuring that certain priorities, values, and context are incorporated into the design and execution. A written document that captures your assumptions about how change happens, such as in a theory of change, is a framework specific to your program or initiative that can be a helpful reference for you as you are creating a learning agenda. It reveals the connection points and assumptions that you can test with data and incorporate into your learning agenda.

The Advocacy Strategy Framework is a one-page tool for thinking about how change happens (or the theories of change) that underlie advocacy strategies. It acknowledges that change is not linear and there are many actors involved in achieving policy change, and can be a way to look at the full ecosystem of advocacy efforts on an issue. The framework presents different levels of changes achieved with different audiences and includes interim outcomes with example indicators for each. This is a great tool to use as a starting point for those beginning to measure advocacy efforts or advanced evaluations seeking to explore an advocacy ecosystem.

Advocacy Strategy Framework



Instructions for Using this Template

This document lays out a template with guidance for creating a learning agenda. A learning agenda includes decisions that learning will inform, prospective learning questions, retrospective evaluation questions, hypotheses, data collection sources and methods, and learning moments to guide your evaluative work to support ongoing learning and strategy development (see Learning Agenda Quick Guide for more details). This template includes guidance for a team or group to go through all the steps needed to develop a learning agenda.

The template also includes special consideration for learning about advocacy efforts.

After going through all the steps, fill out the table on page 26. For each step, we have outlined the different components, with space to think through the content of each step. We suggest using a sequential process when creating a learning agenda.

Focus your learning

- Decisions that learning will inform
- Learning Questions
- Hypotheses
- Evaluation Questions

Choose data sources & methods

- Primary sources
- Secondary sources

Plan Learning Moments

- Opportunities
- Logistics

1 Focus your learning

Decisions that Learning will Inform

It takes time and effort to seek new knowledge. That's why it's important to focus your learning and make sure what you are learning is connected to the decisions you are making.

A core purpose of learning agendas is to connect learning and evaluation to strategy and decision-making. By articulating the decisions this learning will inform, you can document your thinking about how you will use what you are learning to inform decision making.

To think about when developing decisions that learning will inform

- What are some challenges you are encountering right now, and what choices are you coming across in your work? Think about strategy and implementation related to your key areas of work.
- What is the purpose of this evaluative work? If it all goes well, what are you hoping to do with the results?
- At what key decision-making points will learning from answering these questions be relevant? How will you apply what you are learning to your work?

Learning Questions

All learning starts with a question. You want to develop focused questions that, when answered, help improve your interventions and better communicate your progress.

Learning questions frame your learning and act as your "north star." Learning questions are forward-looking and are the "umbrella under which evaluation questions live." Learning question stems include: How can we…? What does/will it take to…?

This format helps to keep the questions forward-looking and actionable and helps people move from abstract actions to concrete ideas.

As a first step, we recommend watching this webinar from the Center for Evaluation Innovation, which provides a helpful overview of how to think about learning and evaluation questions. They share useful guidelines for asking "powerful questions," which are questions that are forward-focused and action oriented. You can also read more about powerful questions on the EL website.

Identify your learning focus.

What are you interested in learning related to your key areas of work?

Start by listing all areas of work you are interested in learning about.

↓

Look at these areas of work – can you group them into thematic or topical areas?

↓

Once you have grouped your learning areas, ask yourself: are you already doing any evaluative work on this topic? If so, list out that work.

↓

What are some questions you could ask related to each learning area? Try starting the questions with the following stems: How can we…? What does/will it take to…? Using this frame keeps the questions forward-looking and actionable and more concrete.

There will likely be some **trade-offs** you have to make as you build a learning agenda.

You may want to **answer the most pressing questions**, while taking into consideration the amount of work and time required to answer these questions.

We suggest having o**pen and transparent conversations** about what can be possible to meet a good balance.

If you'd like to **focus further**, consider:

- Look at your learning areas: are there certain areas that are **under-explored**? This may help you determine what to focus on.
- What is the desired **time horizon** for your learning agenda? Learning agendas can be developed for any length of time, although we typically utilize a 1–3-year timeline. Based on your time horizon, think about how many questions might be appropriate to answer.

To think about when developing learning questions

- ☐ What are you interested in learning related to your key areas of work? What are some questions you could ask related to each learning area?
- ☐ Do your questions test your theory of change, build your evidence base, and/or help you be more responsive to changes in context? If you answered no, how can you re-frame or re-focus the question?
- ☐ Will the question, when answered, help you be more effective? If you answered no, is there another purpose that answering this question may serve? If not, consider re-wording, de-prioritizing, or not asking this question.

Hypotheses

Hypotheses are a way to make thinking transparent about the results of our actions, and give us the ability to test our assumptions.

Assumptions are the underlying values, logic, field knowledge, perspectives, and biases that shape why we choose to do the work we do and how we do it.

Advocacy design and strategy depend upon the assumptions made about how change happens. If those assumptions are incorrect, advocacy will not result in its intended impact.

Hypotheses are often formed in if- then- statements. For example:

To think about when considering your hypotheses

- Looking at your learning question, what are your educated guesses about the answers you may see?
- What assumptions do you see about how your work is implemented and the results it may lead to?

if...

We build the capacity of community members to advocate for health equity...

then...

...more community members will become local leaders, resulting in changes they believe best support their health...

Hypotheses may also be visible in strategy documents such as an outcome map or theory of change, where the assumed pathways of change are made visible. The outcomes we seek to achieve are the assumed results of the strategies we use and the work we do.

Interim Outcomes in Advocacy

Sometimes policy goals take years to achieve; interim outcomes signal important progress to be achieved along the way. Capturing interim outcomes helps advocates check whether strategies are on track or where adjustments might be needed.

The Advocacy Strategy Framework identifies a set of possible interim outcomes for an advocacy strategy, depending on how that strategy is positioned in the framework, which are offered as evidence of progress.

Incremental examples of success (interim outcomes) for policy change work could include:

Build support/allies. Since advocacy work is often long-term, your advocacy may require building partnerships, developing new generations of leaders, and growing your base as a step towards your ultimate goal.	**Read/react to the environment.** The environment (in a political, social, and economic sense) influences your ability to be successful. Your ability to react to the changing environment and take advantage of "opportunity windows" makes success more likely.
Read/react to opponents. Often, your cause may face opposition: either people actively working against your goals or distracting from it with other priorities. Anticipating and minimizing their moves better position you for success, and is a measure of progress.	**Make progress with decision makers.** Begin by identifying the specific decision makers you want to reach out to. You can measure each decision maker's current level of support for (or opposition to) your issue and how their support has changed over time.

Evaluation Questions

Evaluation questions are the specific questions you need to answer to test your assumptions. They are WHY you are collecting information on something, and allow you to focus your measurement (and save yourself some time!).

While learning questions and hypotheses are forward-looking, evaluation questions pull in the now. They consider the information available to us based on what is currently happening, or what has already happened.

Evaluation questions can focus on questions related to how something was implemented (quality, quantity, timeliness, etc.) or on outcomes related questions (differences in knowledge, attitudes, behaviors, or conditions).

To think about when developing evaluation questions

- What topics, related to the learning questions, are you interested in exploring? Feel free to first list the topics out before turning into a question.
- What specific supporting questions can help you answer your broader learning question?

learning question

What will it take to build the capacity of community members to advocate for health equity?

hypothesis

If we build the capacity of community members to advocate for health equity, then more community members will become local leaders, resulting in changes they believe best support their health.

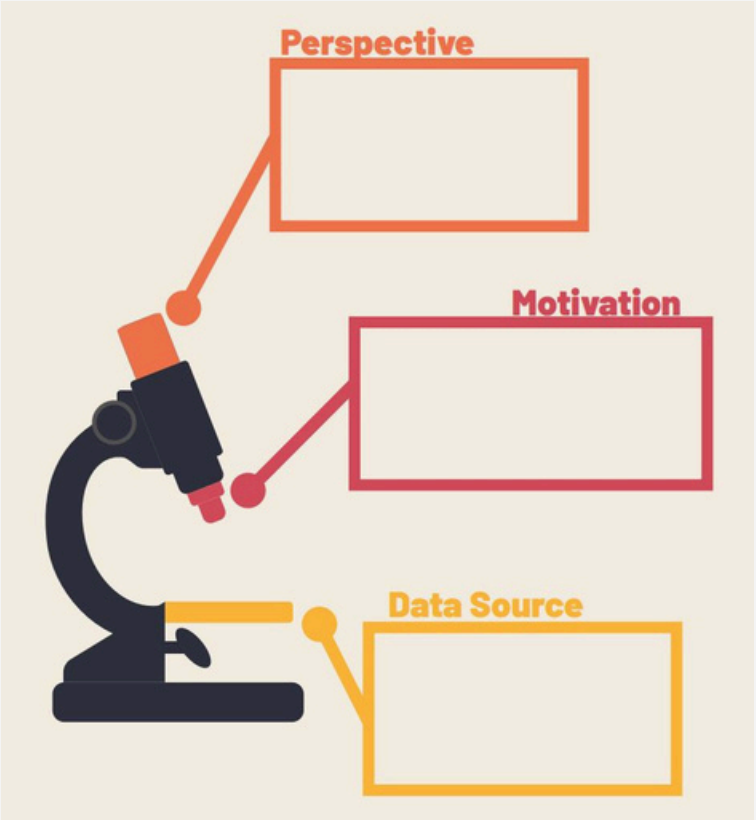
evaluation questions

To what extent have we strengthened advocacy capacity among community members?

What strategies were most effective? What were some of the challenges?

Pause and Reflect

What perspectives are included in your learning and evaluation questions? You can invite multiple perspectives to make sure you're answering questions that are relevant not just to you, but to other people involved in your program who can use the information for making progress faster towards your goals. The We All Count Microscope tool helps you reflect on different perspectives (the lens of the microscope) and different focuses of the evaluation (the slide under the microscope).



After you have developed your learning and evaluation questions, go back to decisions the learning will inform. Are there any specific actions or decisions that this learning would inform?

2 Choose data sources & methods

Data Sources and Methods

Data collection sources are the places or people you will find the information you need, while data collection methods are how you will gather the information.

For all the data you plan to collect, identify where the data could come from. Would this be a **secondary source** (another entity collects this information and you have access to it), or a **primary source** (would you need to collect the information yourself)?

Once a source has been identified, consider the best approach for collecting the information you need from that source.

The goal in data collection is to minimize the number of collection instruments you use and maximize the amount of useful information you collect from each one!

When choosing the best data collection method to obtain the information you need, consider:

- Which methods will be least disruptive to your program or initiative and to those you serve or engage with?
- Which methods can you afford and implement well?
- Which methods are best suited to obtain information from your sources (considering **cultural appropriateness** and other contextual issues)?

After identifying data collection methods, consider:

- What is the level of effort (low, medium, high) required to collect and analyze the data (e.g., cost and time)?
- Do you have any tools in place you could use to collect the data?
- What data are you already collecting and can you strengthen those systems to make them more systematic and rigorous?
- What new data do you need to collect to support what you've decided to measure? Who has the capacity to collect and analyze this data?

To think about when choosing data sources and methods

- [ ] What information do you need to answer your question?
- [ ] How will you go about getting this information?

Measuring Advocacy Efforts

Many traditional methods can be used for measuring advocacy. For example, a survey could measure the strength of relationships between advocates and advocacy partners.

However, there are some methods commonly used to evaluate advocacy efforts, some of which are listed to the right.

Read more about these methods in the resource: Unique Methods in Advocacy Evaluation.

Common or unique methods in measuring advocacy efforts:

- **Media Tracking.** Counts of an issue's coverage in the print, broadcast, or electronic media.
- **Media Content or Framing Analysis.** Qualitative analysis of how the media write about and frame issues of interest.
- **Policy Tracking.** Monitoring of an issue or bill's progress in the policy process.
- **Bellwether Methodology.** Structured interviews with "bellwethers" or influential people in the public and private sectors. Bellwethers are unaware beforehand that the interview will discuss the policy issue of interest.
- **Intense Period Debrief.** Evaluative inquiry shortly after a policy window or intense period of action occurs.
- **System Mapping.** Visual map of a system, identifying the parts and relationships in that system.

3 Plan Learning Moments

Learning Moments

Learning Moments are moments to make sense of what you are learning and are connected to key decision points where you will need to bring in learning.

They provide a way to come together and discuss what is working, what is challenging, what you are learning, and how you may need to adapt. They can help you be more intentional about bringing together everyone involved to reflect on their experiences and the data being collected.

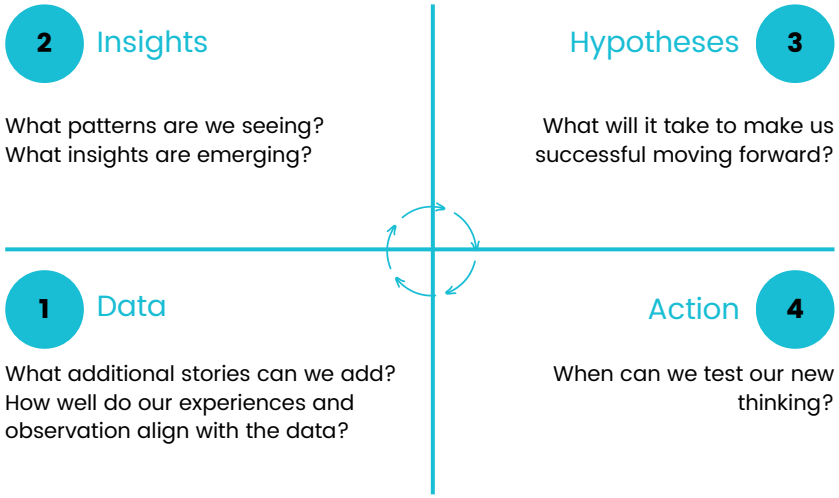
When **identifying** learning moments:

- What are moments where you can make sense of what you are learning?
  - Part of identifying learning moments may involve becoming more intentional in the spaces and meetings where staff and other actors already gather. Do you have recurring staff meetings, planning meetings, or partner meetings where you can more systematically reflect together?
  - Consider holding reflection sessions as data are made available to encourage an environment of sharing and learning.
- What are the key decision points where you will need to bring in learning?
  - Review the section "decisions this learning will affect." Based on how you plan to use your learnings to inform decision making, when would you need to take specific actions or make those decisions by? Work backwards to identify when it makes sense for learning moments to occur.

When **holding** learning moments:

- Who should be involved?
  - When you reflect on data, make sure the right people are involved! If decisions or actions that arise from these data will affect a group, it is a good sign that they should be involved in interpreting and reflecting on the data as well.
  - Learning should be an opportunity for **all** learners to reflect and take action based on what is being uncovered. For that to happen, all participants must be bought into the learning moments. This will help ensure that the insights generated will be useful to everyone involved.

- How can I conduct a learning moment?
  - Once you have collected data, it is important to engage with it, which is why we recommend only collecting what you can realistically use. This can be a simple process. One we like to use involves reviewing the data then asking the following questions:



  - We find it helpful to have someone assigned the role of facilitator who can ask probing questions. If you're doing this work internally, make sure they also have space to provide their own insights, so it can be helpful to rotate the facilitator role within a reflection session.

To think about when identifying and holding learning moments

- [ ] What are moments where you can make sense of what you are learning?
- [ ] What are the key decision points where you will need to bring in learning?
- [ ] Who should be involved?

Exploring Further

This template is meant to guide a thoughtful approach to learning and reflecting on your work. If you need more detailed guidance for some of these steps, such as deciding on specific measures to collect data on, building data collection tools, and ethical management of data, please check out these great resources:

- Better Evaluation
- Evaluation Toolkit
- A Practical Guide to Advocacy Evaluation

For more intensive coaching, evaluation, and learning support, contact Innovation Network at https://www.innonet.org.

Learning Agenda Quick Guide

Components of a Learning Agenda

Decisions that learning will inform

The purpose of learning agendas is to connect learning and evaluation to strategy and decision-making. This is to articulate your thinking about how you will use what you are learning to inform decision making.

Learning questions

Learning questions frame the learning and act as your "north star." They are forward-looking and will stay the same through the course of the learning. They are the "umbrella under which evaluation questions live."[1] Learning questions help to connect learning to strategy and decision-making. Learning question stems include:

- How can we…?
- What does/will it take to…?

Hypotheses

Hypotheses are not explicitly captured in the template, but are helpful when creating learning and evaluation questions. Hypotheses are a way to make thinking transparent about the results of our actions, and give us the ability to test our assumptions. Hypotheses are often formed in if- then- statements.

Evaluation questions

Evaluation questions are the specific questions you need to answer to test your assumptions. Evaluation questions are nested under each learning question and answering them will provide data and insights for the learning questions. They are why you are collecting information on something. They are typically more specific and concrete than learning questions and are often retrospective. Evaluation questions can be revisited and adapted if needed.

Data sources and methods

These are the sources we will draw from to collect information about the evaluation questions and are developed after the learning and evaluation questions are finalized. These can also change as the evaluation questions change.

Learning Moments

Learning Moments are moments to make sense of what you are learning and are connected to key decision points where you will need to bring in learning. They are opportunities to pause and reflect either individually or as a group.

Guiding Questions

Decisions that learning will inform

What are some challenges you are encountering right now, and what choices are you coming across in your work?

At what key decision-making points will learning from answering these questions be relevant? How will you apply what you are learning to your work?

Example: Identify practices the Foundation and its partners can implement to build advocacy capacity among community members.

Learning and evaluation questions

What information do you need to test your theory of change, build evidence, and/or help you be more responsive to changes in context?

What specific supporting questions can help you answer your broader learning question?

Example: What will it take to build the capacity of community members to advocate for health equity?

- To what extent have we strengthened advocacy capacity among community members?
- What strategies were most effective? What were some of the challenges?

Data sources and methods

What information do you need to answer your question?

How will you go about getting this information?

Example: Strength of community leadership in the campaign → Survey and interviews with community members in the campaign

Learning Moments

What are moments where you can make sense of what you are learning?

What are the key decision points where you will need to bring in learning?

Who should be involved?

Example: Monthly team meeting and Annual reflection meeting

Learning Agenda Template

DECISIONS THAT LEARNING WILL INFORM	LEARNING AND EVALUATION QUESTIONS	DATA SOURCES AND METHODS	LEARNING MOMENTS
List the decisions that learning will inform that you filled out in the template above.	Learning Question #1: List learning question here Evaluation Questions: 1. List evaluation question here. 2. List evaluation question here. 3. List evaluation question here.	List data sources and methods here, e.g.: Document review; Focus groups; Interviews, Sensemaking session, etc.	List opportunities for reflection, and using what you've learned.
List the decisions that learning will inform that you filled out in the template above.	Learning Question #2: List learning question here Evaluation Questions: 1. List evaluation question here. 2. List evaluation question here. 3. List evaluation question here.	List data sources and methods here, e.g.: Document review; Focus groups; Interviews, Sensemaking session, etc.	List opportunities for reflection, and using what you've learned.

Key Terms

Key Terms: Include key terms in the learning agenda that could benefit from precise definitions to add clarity for everyone using the learning agenda.

Looking at each word in the template above, which could plausibly be defined differently by different groups, and therefore be clarified by having a singular definition? This will enable everyone to understand what is meant when these key terms are used.

KEY TERM	DEFINITION
List key term used in the learning agenda here, e.g., racial equity.	Write a definition, finding alignment with other partners as necessary.
List key term used in the learning agenda here, e.g., racial equity.	Write a definition, finding alignment with other partners as necessary.