

# The Learning Agenda Design Sprint (LADS): A User-Centered Model

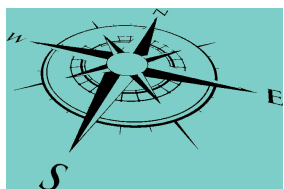
The Learning Agenda Design Sprint (LADS) we present here is an evidence-based, user-centered model that focuses attention on the evidence needs that emerge at the different stages of a program or policy life cycle. The model is informed by empirical research on knowledge brokering and the original Knowledge Brokers simulation.

The Learning Agenda Design Sprint is a seven-step process. It consists of a series of workshops and person-to-person interactions (virtual or in-person). During the first workshop session, participants are briefed on the entire design process and begin the drafting process for the learning agenda. But the session will not result in a complete, draft learning agenda—the process is intended to be participatory and iterative. After the first workshop, subsequent sessions focus on various steps in the design process, reflecting on the information produced previously, and gaining perspectives from senior decision makers and evidence users. Ideally a LADS exercise can be conducted in-person over the course of a week, in four sessions, with some feedback given to participants in-between sessions. It is also adaptable to an online engagement that can be conducted over several weeks.

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## IBM Center for The Business of Government (IBM CBG)

### Stakeholder(s):

**Daniel J. Chenok :**

*Executive Director, IBM Center for The Business of Government*

**Leanne Haselden :**

*Partner and Practice Leader, Cognitive & Analytics Support*

**Kathryn Newcomer :**

*Co-Author | George Washington University*

**Karol Olejniczak :**

*Co-Author | SWPS University of Social Sciences and Humanities*

**Nick Hart :**

*Co-Author | Data Foundation*

### Evidence Users :

*For the purpose of the LADS process we define “evidence users” as politically-appointed leadership, career senior executives of the agency responsible for strategic program-*

*ming, and program or project managers responsible for the day-to-day implementation of agency activities. Other stakeholders who are responsible for delivery of a particular program, e.g., regional or state level managers involved in delivery, could be included. Our definition of evidence users is contextual, related to the ecosystem of stakeholders and decision makers relevant to the specific program, mission or agency objective that will be the subject of the LADS model.*

### Evidence Producers :

*“Evidence producers” are staff in monitoring and evaluation units, performance offices, statistical agencies, policy analysts, data scientists, and other staff responsible for conducting or contracting out diverse evidence-generating activities, such as research, evaluation, and monitoring. Involving both evidence users and producers together in LADS is intended to reduce the gap between evidence producers and programmatic decision makers. The evidence producers and potential users typically are driven by different imperatives and time frames and may use different languages and practices.*

## Mission

To reduce the gap between evidence producers and programmatic decision makers

## Values

**Learning:** Learning agendas are designed to provide an internal management tool, intended primarily for agency decision makers accountable for successful planning and delivery of programs and policies. The plan can also be used externally to promote evidence-building that may be funded by nongovernmental partners. However, the production of new knowledge and evidence is funded or supported, the emphasis on ensuring ultimate users are part of the development process—and meaningfully engaged throughout the process—will likely result in a more useful, relevant, and salient plan.

**User-Centricity:** In federal agencies, there are traditionally few user-centered approaches applied that result in meaningful engagement and participatory processes. Many federal agencies rely on the use of advisory committees, which provide expert feedback on topics requested by the agency and may meet on a recurring basis. Nearly all federal agencies rely on mechanisms like the Federal Register for requesting comments in a unidirectional discussion. Some agencies, especially ones issuing regulatory actions, may engage more directly with stakeholders in the regulated

community by holding workshops or public forums for soliciting feedback on draft proposals prior to finalizing an action. While these activities are attempts at engagement, they often result in agencies and individuals listening, rather than collaborating with participants on policy design.

**Participation:** When developing learning agendas, additional active processes should be considered as meaningful ways to engage stakeholders, such as including individuals from other parts of government in the formulation and use of the plans. The traditional, passive feedback mechanisms of the 20th century provided structured opportunities for input from stakeholders, such as via written comments on draft plan. However, to develop an effective and meaningful learning agenda that will create a sustained focus on evidence-building activities necessitates a more active strategy

**Understanding:** In recent years there has been a renewed interest in using design approaches in public policy and public management. Although the notion of policy as a design is not new, the application of highly collaborative and user-centered design to develop complex public management processes is novel. This type of design method stresses focusing on understanding users of the particular solution, co-designing the solution with them, making the discussed concepts tangible. User-centered design approaches are well-aligned with the purpose and intent of the learning agendas.

#### **Iteration**

## Pre-Conditions

*Answer key questions*

### Stakeholder(s)

#### Evaluation Officers :

*As key owners of the process, evaluation officers should start by answering the three following questions before conducting a sprint*

Application of the LADS model is contingent on answering several key questions, generally aligned with the pre-conditions for learning agendas discussed previously. ~ Questions to Ask Before Conducting a Learning Agenda Design Sprint The Learning Agenda Design Sprint is a tool for evaluation officers, or other senior managers who are in a position to lead a learning agenda development process. The model is based on existing research about organizational learning within public agencies that indicates that evaluation units and evaluation officers should serve as initiators and facilitators of the process of developing learning agendas. 29 The high level of engagement of stakeholders is also consistent with the requirements of the Evidence Act. Evaluation officers should be positioned to secure participation of potential evidence users in the Learning Agenda Design Sprint process, whether it is conducted in-person or virtually.

### Q1. Scope

*Determine the scope of the design exercise*

Question 1: What is the scope of the design exercise? The facilitator who is in charge of running the LADS starts with addressing the critical decision of which agency stream of activities, program, or strategic goal will be addressed. The focus of the exercise should be determined by the agency mission, the structure of priorities, strategic plans, and strategic goals. The focus might be an agency's strategic goal or a set of programs, or even a cross-agency shared goal, with clear objectives and general agreement among stakeholders about what those objectives are. The LADS is flexible in that it can be employed to develop one Learning Agenda for the whole agency, or to produce sets of learning agendas for each of the agency's strategic priorities, programs, or divisions (which can later be aggregated into an agencywide learning agenda). In addition, in consultation with agency leadership, the facilitator has to decide on the time perspective they want to cover in the LADS process. Should the timeframe be one year, four years, or six months? These two decisions are fundamental since they determine the focus of the learning agenda and form boundary conditions for the whole creative design process. A core prerequisite for the design exercise is the identification of what will be discussed.

### Q2. Process Maturity

*Consider the maturity of the learning agenda development process*

Question 2: How advanced are we in the learning agenda development process? The facilitators should consider how mature the process of learning agenda development is in their agency. The LADS model can be used at different phases of an agency's learning agenda development process, for example, when a first learning agenda is initially considered or when an existing learning agenda is being refreshed. For staff who are first-time participants in the LADS process, the initial results might be (1) a mapping of the ecosystem of potential evidence users, (2) developing a shared understanding among the program staff and leadership about the program's "journey," and (3) when and how evidence could be used to inform agency decision makers. For participants with more experience in developing a learning agenda, LADS could help evidence producers better prioritize multiple evidence needs, link them with specific decision timelines, and achieve a balance between operational and strategic issues. Dialogue between evidence producers and users should also help in streamlining the flow of evidence, mainly by forging a shared understanding between the analytical staff and the program delivery managers. For agencies with experience in developing a learning agenda, LADS could also serve as an opportunity for critical self-reflection. For example, the exercise could allow both programmatic

leadership and evidence producers to question long-standing assumptions they have made (e.g., about decisions on inclusion of certain stakeholders as evidence users), and to reconsider the focus of learning they had selected (e.g., the balance of operational and strategic perspective, and shorter versus longer-term learning).

### Q3. Participants

*Determine who should be involved in the design exercise*

Question 3: Who should be involved in the design exercise? In recruiting or requesting participation from senior leaders and other stakeholders, the facilitator must take into account the limited time availability of the more senior leadership and program administrators within and outside the agency. And the facilitator needs to clarify the different categories of evidence producers and users who are needed to make the dialogue productive. Participants in the simulation are needed from four groups ... In all cases, the ability to coordinate and consult with stakeholders and participants across these four categories is essential to effective use of the LADS process.

#### Stakeholder(s):

##### **Evidence-Generating Staff :**

*Category 1: Evaluation and other Evidence-Generating Staff. The first group consists of evaluation office staff, and representatives of other offices producing data and information in the agency. These staff should be involved in all workshop activities, and provide the backbone for the entire operation and activity. Their time commitment is the greatest of all of the potential participants.*

##### **Program Delivery Staff :**

*Category 2: Program Delivery Staff. This group is comprised of agency personnel in the units primarily responsible for the delivery of the programs in question (preferably the heads of those units). These staff would be involved in most of the workshop activities. Their time commitment is also substantial.*

##### **Decision Makers :**

*Category 3: Decision Makers. A third group consists of strategic decision makers and senior staff of the*

*agency responsible for the design and implementation of programs. They would be consulted periodically at different points during the in-person or virtual workshops, and asked to comment on draft deliverables. Their input is a valuable aspect of the process to ensure the priorities and timing of evidence needs are clarified to evidence producers.*

##### **External Stakeholders :**

*Category 4: External Stakeholders. A last group of individuals consists of external stakeholders of the agency or organization. Individuals in this category could be identified either before, or early in, the LADS process so they can participate throughout the remainder of the process and the workshops. Individuals in this group might include representatives from the general public, other agencies, other levels of government, nonprofits, or the research and evaluation community.*

## Step 1. Stakeholders

*Understand which stakeholders are relevant to the success of your strategy/program*

### Stakeholder(s)

#### Learning Agenda Stakeholders :

*Definition of Stakeholders for Learning Agendas ~ Stakeholders are individuals or entities that have an interest in the execution of a goal (e.g., benefit or loss, or are impacted by),*

*have an important role in implementation, and or possess key resource or decision-making power crucial to achievement of mission.*

The first step of the process is to identify internal and external stakeholders. Some of this information will likely have been identified prior to the first workshop, and could be used to identify potential participants, these initial participants may expand the list. In this step, participants identify which stakeholders could affect the success of the selected program or strategic goal. Working from a chart with concentric circles, the program or strategic goal is at the center of the circles and different types of stakeholders are identified in rings around it, including internal, external, oversight, partners, allies, and opponents. Each level of the concentric circles connotes the relative importance of the stakeholder for achieving program goals, their interest in execution, or the extent of their role in implementation. Stakeholders involved in implementation might include, for example, representatives of state or local governments, nonprofits, and/or private sector contractors involved in the delivery of the program or strategy. During the session, participants directly identify and note the relevant stakeholders, and discuss them with other participants in the process.

### 1.1. Map

*Develop a stakeholder map*

The map of stakeholders will help us later in deciding who should be involved and when, in certain learning activities. ~ The reason the LADS begins with a stakeholder map is simple: many programs may have a general sense of stakeholders but not a comprehensive, shared understanding of the community that affects achievement of goals and objectives. Through brainstorming about potential stakeholders early, additional individuals can be invited to participate in the subsequent steps in the process. The stakeholder mapping process is also useful for identifying indirect evidence producers and users who can support or otherwise affect implementation of identified activities.

## Step 2. Decision Points

*Identify points when evidence would be especially helpful to assist in mission achievement (at the strategic or operational level).*

Identify Key Decision Points ~ During the second step, participants identify points in time—“decision points”—when evidence would be especially helpful to inform program or strategy implementation. Identifying the key decision points enables the development of a timeline so that the production, identification, or brokering of evidence can occur before decisions are finalized. For this step, the session participants start with putting program goals at the end of the timeline. Then participants use their existing knowledge of program operations to consider major decisions around budgets, reauthorizations, regulations, policy guidance, grant awards, operational activities, and other major activities in a program. All of the identified decision points are also placed on a relative timeline during the course of the activity so that milestones, critical decisions, crucial meetings, reviews, reporting requirements, and even major stages of program implementation are clearly identified.

### 2.1. Deadlines

*List important deadlines*

Listing important deadlines will help align the timing of the demand and supply for evidence.

### 2.2. Activities

*Organize our learning activities*

It will also organize our learning activities as an aid for important decision points. ~ Definition of Key Decision Points: “Decision points” could mean milestones, key decisions, crucial meetings, reviews, reporting requirements, even stages of the implementation, etc. If possible, participants should avoid putting periods of time, e.g., periods of implementation. They should rather put concrete decision points that have a concrete date in time.



### 3. Knowledge

*Identify the knowledge needs of decision makers who need to make better decisions, at key points in the program strategy's timeline.*

#### Stakeholder(s)

##### Evidence Users :

*Key evidence users are those who are primarily responsible for making a particular decision or who have such high*

*interest in the issue that they are willing to actively engage in the learning agenda development process.*

##### Decision Makers

Catalog Knowledge Needs of Evidence Users ~ Once the program timeline is established, the workshop participants identify who needs what evidence to make decisions at the specific points in time. For each decision point on the timeline, participants decide which stakeholders are the primary decision makers; these stakeholders become the evidence users. It is possible that one decision situation could involve several evidence users. During the brainstorming, participants also refer to their initial stakeholder map (see Step 1). Based on this, they can discuss which actors from the stakeholders' map may be involved in the decision making, when they should be involved, and why some stakeholders from the ecosystem of the program do not emerge as evidence users. Discussing the roles of the various stakeholders can lead to meaningful conversations about the program's ecosystem of decision makers, the current level of stakeholders' involvement in key deliberations, and underlying assumptions and reasons for any discrepancy between declared involvement and actual presence of stakeholders in key decision-making deliberations.

#### 3.1. Users & Questions

*Document ideas on evidence users and their questions*

The two rows on the Learning Agenda board (emerald and orange) are filled in with ideas on evidence users and their questions. ~ This will help establish the actual demand for knowledge and focus knowledge production efforts on the actors who are genuinely concerned with specific decision making. | Knowledge needs come in the form of questions that are raised by decision makers. Questions can be of a strategic or operational nature, they can ask for explanations of processes or effects, or ask for descriptions or diagnoses of conditions relevant to achievement of desired program outcomes. The questions that are framed can be grouped into the following categories:

##### 3.1.1. Context

*Learn about emerging issues, current circumstances, the nature of the problem addressed by government action, and targeted beneficiaries*

##### 3.1.2. Ideas

*Learn about what solutions are possible, how others have addressed similar policy issues, and what was done in the past*

##### 3.1.3. Process

*Learn how implementation is progressing, or not, and why bottlenecks and delays happen*

### 3.1.4. Results

*Learn what works and why*

... the results of making a change and the mechanisms that produce the desired effects. At this stage of the creative process, participants should focus on the merit of the questions as expressed by the particular user. Wordsmithing to refine the actual wording of the questions can take place later.

### 3.2. Alignment

*Align users and questions with sequences of strategic decision points*

They are aligned with sequence of strategic decision points. ~ During the session participants consider the knowledge needs for each identified evidence user and frame questions that might be addressed to inform decision making. The main objective in this step is to identify the major questions that will arise at key decision points and to be as specific as possible. After initial brainstorming on questions, participants will be asked to step back and reevaluate their usually extensive list of ideas. The simple, pragmatic heuristic is to distinguish between “need to know” and “nice to know” questions. The former is information that needs to be provided to decision makers at a particular decision point in order to facilitate learning about the program. The latter are insights that are valuable yet not necessary prerequisites for informing decision making.

## Step 4. Feedback

*Build a shared understanding of the program/strategy within an organization.*

### Stakeholder(s)

#### Senior Management :

*Comments from senior management that can inform the perceptions and assumptions of the evidence-generating and program delivery staffs.*

Feedback from Senior Management ~ Following the participants' identification of stakeholders, decision timelines and key questions, senior leaders in the organization should be asked to review all, and asked to offer additional suggestions, and determine the alignment of questions that were framed with their own expectations. A divergence in perspectives does not necessarily suggest a failure in the process, or shortcomings in the participants' ability to align their views with leaders' expectations, it is a necessary component of the dialogue and iteration since participants come to the process with varying perspectives based on their own roles and experiences. This step may be repeated multiple times to seek convergence on priority questions and informational needs.

### 4.1. Timeline & Information Needs

*Create a common understanding of the program timeline and information needs*

To create a common understanding of the program timeline and information needs among different program staff and decision makers to improve the future match between evidence demand and supply.

## Step 5. Activities

*Decide where to get credible evidence and how to disseminate it to users to help them make more informed decisions.*

Plan Learning Activities ~ This is the most detailed portion of the workshop since it focuses on planning specific evidence production and dissemination activities. The group of participants is limited to evidence-building staff (research staff, teams from analytical units, evaluation and monitoring units, performance officers, data scientists). Having the list of questions and the timeline for when decision makers need answers, the group will focus on identifying credible approaches to address the questions. The goal of this step is to consider how to generate needed evidence, and plan on the channels through which evidence can be produced and then provided to decision makers and other potential users. For each question, participants brainstorm about what could be reliable sources of data or information to answer it. One question may be addressed by multiple sources. Sources can include experts, surveys, data sets (monitoring data, general statistics), research studies and evaluations, performance audits, consultations, and discussion panels with experts or stakeholders. Of note, and consistent with the Evidence Act requirements, an important aspect of the exercise for federal agencies is to identify what data they may need to collect, data that another agency already collects that may require a sharing or use agreement for access, or alternative sources of data beyond government that could provide useful evidence.

### 5.1. Ideas

*Gather ideas from the evidence producers and link them to the questions raised by evidence users*

Two bottom rows on the Learning Agenda board are filled with ideas from the evidence producers. They are linked to the questions framed in Step 3. ~ The answers to the questions raised by evidence users need to be addressed with credible and sound evidence. Furthermore, the answers, in order to be useful, have to be conveyed to decision makers in ways that are aligned with their communication preferences. | Definition of Learning Activities Learning activities include both evidence generation activities and dissemination actions. Sources of needed evidence may include data sets, existing monitoring systems, and research studies, as well as consultations, and discussion panels with experts or other stakeholders. When discussing how to provide the needed evidence to the users, participants should think in terms of both forms and channels of communication with users, including meetings, structured team discussions, and the format and length of presentations.

#### Stakeholder(s):

**Evidence Producers**

**Evidence Users**

### 5.2. Synchronization

*Reflect on the synchronization of timing between preparation and delivery of evidence*

The participants also reflect on the synchronization of timing between preparation of evidence and delivery to users. The timeline of research studies, especially those addressing more complex questions, often substantially deviates from the points in time when results are needed. For example, questions about potential program outcomes may be asked too late in the decision making process to launch a reliable study. Thus, participants need to anticipate the time needed to deliver evidence. Furthermore, participants identify studies that are assigned to address questions about program effects. They check to see if somewhere on the program implementation timeline those studies have been preceded by some form of baseline measurement, and if the studies are allocated sufficient time to actually measure impact.

### 5.3. Formats & Means

*Brainstorm about formats and means to provide needed evidence*

Finally, during this step, participants brainstorm about what format and through what means they plan to provide the needed evidence to the users. They consider the profiles of decision makers and their preferred means of communicating. The evidence to be conveyed could be communicated in multiple ways, such as via briefings, meetings, structured team discussions, and other forms of presentations.

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## Step 6. Understanding

*Build the shared understanding of the program/strategy among program stakeholders.*

### Stakeholder(s)

#### Program Stakeholders

Feedback from Evidence Users ~ In this step, evidence users (senior management, program managers, and selected stakeholders) review the proposed actions developed in Step 5 by the evidence generating staff. Feedback is focused on two issues: (1) perceptions of the credibility of the evidence and (2) user-friendliness. When considering evidence credibility participants look at the questions and sources assigned to answer each question. They discuss if these sets of sources are acceptable to decision makers in providing credible answers and sound arguments. If the sources are in doubt, participants can delete them, or revise source descriptions. These discussions can lead to productive conversations. On the one hand, evidence users can ask evidence producers to simplify their research activities, and perhaps to provide less extensive evidence, and not provide more time and resource consuming evidence. On the other hand, evidence producers can educate users about the quality of the different types of evidence, and their need to provide different sorts of evidence to answer different types of questions (e.g., the need to establish a counterfactual in order to measure program impact). When it comes to user-friendliness, evidence producers may not appreciate that acquisition is not the primary responsibility of potential evidence users. Thus, when planning on reporting evidence, providers should avoid overloading users with complex, diverse information, and time-consuming meetings. Feedback from evidence users about their expectations for reporting allows evidence-generating staff to better align reporting methods with the users' preferences.

### 6.1. Alignment

*Align perceptions of evidence users and producers*

Comments from evidence users correcting the perceptions and assumptions on learning activities—sources and dissemination methods. | To align perceptions of evidence users and producers, and ultimately to better match evidence supply with demand.

#### Stakeholder(s):

**Evidence Users**

**Evidence Producers**

## Step 7. Utility

### *Improve the utility of the Learning Agenda and the LADS process*

Review the Final Product and Process ~ The final step in the process is used to review the product and improve the overall design of the learning agenda. The participants reflect on materials developed during the process. They are guided by key reflection questions posed by the facilitator that address three issues ... Goal: Improved version of a learning agenda with decision points, questions, and strategies to address the questions. | Why: Make sure that during the creative process the strategic objective has not been overburdened with details, and that planned activities will facilitate organizational learning.

#### 7.1. Strategy

##### *Clarify the path to program/strategy success*

Program/strategy path to success ~ The first reflection point is to clarify the path to program/strategy success. When participants plan elaborate processes, they may drown in fragmented details and miss the bigger picture. The risk is that they will overlook: (a) the pivotal decision points and (b) transitions points that mark important stages in program development and implementation. Participants are asked to re-evaluate their key decision points and mark pivotal moments in the program timeline (so called: make-or-break points). This activity helps participants remove minor reporting requirements and routine decisions from the potentially overcrowded timeline.

#### 8.2. Learning Loops

##### *Improve learning loops*

Learning loops ~ The second reflection point is to focus on improving learning loops. Research on organizational learning indicates that bureaucratic organizations tend to focus on single loop learning (processual question about "doing things right"—according to procedures and on time, addressing symptoms of the problems), and downplay double loop learning (strategic questions such as if they are doing the right things, addressing root causes of the problems). Moreover, performance monitoring systems put in place can often lead to suboptimal practices, distorting organizational behaviors and outcomes (e.g., tunnel vision, ossification, myopia). To minimize this tendency, participants are asked to select questions that are about implementation processes versus questions about program effects and their explanations. Through this sorting process participants can assess the proportion of questions that address operational versus strategic knowledge needs. Furthermore, participants are asked to check if questions about program effects will correspond to ideas of how to generate adequate answers. In general, this activity should help to minimize sub-optimization and organizational myopia.

#### 8.3. Challenges

##### *Anticipate challenges*

Anticipation of challenges ~ The third reflection point to be discussed is to identify anticipated challenges. Participants discuss challenges that may emerge to affect the successful use of the learning agenda. This reflection is followed by a separate discussion on ways to address obstacles that participants identify. Following the reflection period, the learning agenda draft is compiled, revised, and finalized based on stakeholder and participant feedback.

## Administrative Information

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### Submitter:

**Given Name:** Owen

**Surname:** Ambur

**Email:** [Owen.Ambur@verizon.net](mailto:Owen.Ambur@verizon.net)

**Phone:**

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