

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

Chris Talbot:

Hello and welcome to today's HHS ASPE webinar series on Developing and Using a Learning Agenda Approach to Evidence Building. Our event will be starting in just a couple moments, so thank you for joining us early. Today's event will feature Ellie Morefield from the USDA Foreign Agricultural Service. We'll be starting again in about two minutes. Thank you.

Jessica McNab:

Good afternoon everyone. Thanks for joining us. Welcome to today's event. Today, we're bringing you another webinar in the Health and Human Service Office of the Assistant Secretary for Planning and Evaluation Webinar Series, showcasing different federal agencies in their approach for Developing and Using Learning Agendas for Evidence-Building.

If you didn't meet me last week, my name is Jessica McNab, and I'm a task lead for Mathematica helping support this conversation. Also facilitating our conversation today, with help from the government task lead, Dr. Amanda Cash, and my colleagues, Derek and Chris, will help us with some of the operations of logistics and polling and other bells and whistles of the WebEx platform.

Today, we're very excited that the United States Department of Agriculture, Foreign Agriculture Service, has joined us to talk about their evaluation plan and learning agenda approach. This is the second webinar in the seven-part series, and we've shared information for six of the seven webinars through the Federal Evaluator's LISTSERV and other internal communication channels. We're really close finalizing details for our seventh webinar, so you'll see that in one of our last slides, the tentative details, and we'll share that registration information with you shortly.

Let's get started with a couple of housekeeping details. If you are not familiar with the WebEx platform, and I'm sure many of you are, we'll go through a couple things just to make sure that you know how to use the different pods and functionalities of WebEx. If you called into today's session, please make sure to mute your phone to prevent any back from impacting others on the call. Please place your phone on mute unless you are speaking. And, of course, we'll save some time for questions and comments at the end, so we do welcome you to speak when we open lines for question.

On the right side of your audience console there are different features. If you have questions during the webinar, please feel free to click on the Q&A pod to submit your questions or your comments in the text box provide. We'll certainly do our best to answer any and all of your questions. If there's anything we can't answer because we need to dig a little bit deeper or circle back to you, or collect simply those who have registered in attendance at this event, we'll do that. And, of course, we'll have to defer any questions that we may run out of time to answer during our webinar this afternoon.

If you've dialed in by phone, again, please make sure to mute your phone. But if you do want to ask a question or provide a comment for Ellie for anyone else, we're happy to have you do that. Please use the hand icon. You can click on the hand icon, and that will alert us that you want to contribute to the conversation, and we'll make sure to call on you. When well call on you, you'll need to unmute your phone.

And then last, there is access to real-time closed captions should you need it, so you should be able to click on the multimedia viewer pod. There's a little caret mark. If that's not minimized or maximized, please feel free to click on that caret, and that will help open the multimedia label. I believe you're pushing through an event ID in order to put that into the multimedia box, should you need it.

So, our agenda is similar to last week, and it will be similar for each of the webinars in this series. The important part, of course, is that you are able to hear different stories from different agencies, small, medium, large, in different phases of implementation in terms of their learning agenda

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

approach. So, this afternoon, and similar to last week, and our upcoming webinars, we'll go through a couple of these introductory slides. I'll hand off to Amanda so she can work you through, again, the impetus for the project and the webinar series, as well as a few other activities, and she'll also provide a bit of a recap of our first event with the National Institutes of Health last week. We'll save some time for Q&A and we'll wrap with some final details.

So, as mentioned, I'm Jessica McNab. I am a task lead from Mathematica, and I'm happy to be on today's webinar with you. I support a lot of different activity at Mathematica, but most specifically, curriculum development and different shared learning opportunities for technical assistance projects, often focused on quality improvement and delivery system reform. I previously worked on the Star Fund with improvement specialists in the Managed Care System, but also supported technical assistance projects at American Hospital stations for some time.

Dr. Amanda Cash, as I mentioned, is our government task lead. She's the acting director for the Division of Data Policy at ASPE. And Amanda's portfolio includes research and evaluation methodologies appropriate for complex federal programs. She also co-leads the Federal Task Force for Combating Antibiotic Resistant Bacteria. Her office is coordinating implementation and leading the Title 1 or the Evidence Act, which is really why we're here today.

We are also very excited to welcome Eleanor or Ellie Morefield, who is the evaluator and team lead for USDA for the Foreign Agricultural Service. Ellie serves on the Monitoring and Evaluation Staff Team for the USDA Foreign Agricultural Service in the Office of Capacity Building and Development. In this role, she provides monitoring and evaluation and technical assistance to three of the USDA's International Food Assistance Programs; the McGovern-Dole Food for Education and Child Nutrition, Local and Regional Procurement, and Food for Progress.

So, with that, Amanda, I'm going to hand off to you just to recap the series and talk a bit about what NIH brought to the table last week. Amanda.

Amanda Cash:

Thanks, Jess. I'd like to start off by saying that the Office of the Assistance Secretary for Planning and Evaluation within HHS is the policy advisor to the secretary for the department. ASPE, our office, is leading the implementation of the Evidence Act, which you mentioned, with a particular focus on Title 1, and we are conducting these webinars so federal staff at HHS can learn more about evidence-building plans or learning agendas, but also others as well. We welcome your questions and participation as we move through this series.

The objectives of this series is to really dig into learning agendas and evidence-building plans and to have speakers discuss their organization's stage of implementation of evidence-building approaches, prophesies to build evidence building approaches and how these processes were implemented, barriers faced when developing and implementing these plans, and strategies to address those barriers, as well as the impact of evidence-based planning on evaluation, organizational decision-making and program effectiveness and any lessons learned.

As Jess mentioned, last week, we had the National Institutes of Health as our primary -- well not our primary, but our first webinar in the series, and they shared their approaches us with, Dr. Marina Volkov and Dr. Ajay Vatave noted that they are in the process of implementing their learning agenda and discussed six steps that they've embedded into their approach, and they also shared their next steps. We will be notifying you once you can access that presentation and the recording. And I think I'm going to turn it back over to your Jess, for our first poll.

Jessica McNab:

Yeah. Thanks, Amanda. So, again, if you joined us for the first webinar, we would like to request a little initial data just to see who's on the line with us. It's always important. I think it helps gear the conversation. We might queue up some of the questions that you have for Ellie this afternoon. So, with that, I'm going to queue up Derek and Chris to push our first poll, which will really gauge

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

what are your learning interests for this afternoon's webinar. So, Chris, Derek, can you please poll 1.

Okay. Thanks.

Perfect. Thanks Derek. So, at what stage is your agency implementing alerting agendas to evidence-building? So, you'll select one stage. Are you A, implementing an operational; B, fully implemented; C, in the process of implementing; D, planning to implement; or, E, feel free to chat in if none of those stages represent where you are in terms of implementing a learning agenda for evidence-building? And I'll give you just a few seconds here to select your response, and then we'll push those results so you can see them.

Chris Talbot:

Jess, we are getting great response to this poll. The vast majority people on the call today are actually planning to implement at this point. 61 percent of our response is coming in at that identification level. But there are people at all ends of the spectrum as far as where they are with either in the planning stage or all the way through fully implemented and operational.

Jessica McNab:

Uh-huh. Great. Thanks, Chris. That's really helpful. And so, the results from our first poll, I think, certainly folks are across the board. A few folks are fully implemented and operational, which makes sense. That's one of the reasons or the instances of this webinar series and the summary report, if you hear from others that might just be in the start of their process or might be a little bit further fleshed out in terms of implementing or operationalizing, certainly across the board. It's good to hear that folks are in a planning stage. Again, you may have joined us last week. This might be the first webinar for you. You may suggest to others colleagues from your agency join our additional webinars, but that certainly gives us a good sense of who is on the line. So, Derek, why don't we close that poll and open our second poll.

Okay, here we go.

Great. Thanks, Derek. So, the second poll is, again, from last week. What are you most interested in learning in this webinar series, specifically this afternoon with Ellie? Again, this is a nice context for her before she jumps into our conversation. So, are you most interested in hearing how agencies are fully implemented learning agendas or what nor process is, how agencies actually structure their approach, the barriers and strategies that they use, what or how agencies have learned from implementing learning agendas, or other? Feel free to chat in additional responses if we haven't captured that there for you, and, again, I'll give us a few seconds. If you want to answer that poll, that would be great.

Chris Talbot:

And, Jess, it does look like we've got about 70 percent of our audience responding today that they are interested in seeing how agencies have structured their approach and processes to implement learning strategies.

Jessica McNab:

Okay.

Chris Talbot:

But we also have about a third of our audience that are interested in the barriers that people have experienced and how the different strategies they have used to overcome them, as well as how and what agencies have learned in their implementation of learning agendas.

Jessica McNab:

Okay, great, that's helpful Chris. I think that's likely similar to the results that we saw from webinar one, which also, I think, validates the approach that we've used for these webinars. Ellie will

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

spend most of her time really talking about the approach and the structure, and she'll spend, I think, a good deal of time talking about barriers as well. So, we hope that that meets some of the needs on the poll. Thank you.

So, with that, I'm going to pop back to our slides here, and, again, we're really excited that Ellie has joined us this afternoon. Ellie has been a pleasure to work with so far, and we're excited that she can bring you the USDA's approach.

Just a reminder that we'll save some time for questions at the end. But if you do have questions that come up throughout Ellie's communication, feel free now just to chat them in, raise your hand. That way we can flag you or we can reiterate what your questions are to Ellie once we get to the Q&A questions. So, now, I'll hand off to you, Ellie.

Ellie Morefield:

Thank you so much, Jessica and Chris, and thanks to Amanda and ASPE and colleagues for this great opportunity. We really appreciate it at USDA. This is a great chance for us to share our experience with developing the two learning agendas that I'll be talking about today that align with our two international food assistance programs. So, we really appreciate this. I'll be able to talk about, you know what we did, what we learned from our own experience, the challenges we faced, how we overcame them or still are working to overcome them, and it's just really nice to connect with this community of fellow federal employees, you know, and maybe people from the public who are working in monitoring evaluation or research and data and who are engaging, really, with the Evidence Act guidance and requirements, as we are. So, really appreciate it overall.

Let me do, by way of a brief overview, of what I'll talk about. Our learning agendas were finalized in 2016, so we're in that stage of operationalizing the learning agendas, the stage you'll see in a later slide. What I share today, as Jessica mentioned, will largely focus on the process we went through to develop the learning agendas, and the hope there is that that helps others who are in that stage of considering developing or beginning to develop a learning agenda to comply with or align with the Evidence Act.

Let me also just acknowledge up front, by way of framing, that our learning agendas were, of course, developed several years ago now, so before the Evidence Act was passed, and they exist at the program level, specifically reflecting our two food assistance programs, so we're, in a way, in the same position as many of you are. We're considering what the Evidence Act recently passed means for us, whether we're potentially develop another learning agenda or some type of evidence-generating plan ourselves, potentially as an agency or sub-agency level for example. We would likely follow some of the same stuff we learned in the past. We can learn from our own experience and our own challenges, and so, again, I hope that going through some of those steps, some of our process provides good food for thought for others.

Here's just a little bit of background about my office and the food assistance programs that I'll be talking about. I work for, as Jessica mentioned, the Foreign Agricultural service within USDA, and I'm Office of Capacity Building and Development, in a branch called Monitoring and Evaluation Staff. And so, my small team's main role is to support monitoring and evaluation of various capacity-building activities. I specifically focus on our food assistance programs.

These programs provide U.S. agricultural commodities to millions of people around the world. They're international programs. We do direct donations and concessional programs. And these programs combined with trade capacity-building efforts support long-term economic development help countries make the transition from food-aid recipient to commercial buyer. So, in terms of our position in USDA, that's their tie into the broader trade facilitation and export-enhancing work of the foreign ag service and, ultimately, of USDA. Next slide. Thanks.

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

And so, the food assistance programs that we developed learning agendas for are the McGovern-Dole Food for Education and Child Nutrition Program and Food for Progress. And, again, in terms of my role, my team's role, we do provide technical assistance to those programs, so we help essentially support the monitoring and evaluation system for those programs. We have standard indicators. We have monitoring evaluation policy. Our programs carry out evaluations that do help generate evidence on the project level of their impact, and the outcomes outputs as well. And so, my team is involved in the many aspects of the project implemented under those programs.

Just a few notes about each program. Food for Progress has two objectives. The Food for Progress Project improves agricultural productivity and expand trade of agricultural products, so they work with farmers and businesses to develop associations and cooperatives, project expand or improve processing capacity. They develop businesses related to agricultural inputs and outputs.

McGovern-Dole is a program that helps support education, child development, and food security in low-income food deficit countries by providing for the donation of U.S. agricultural commodities, as well as financial and technical assistance to support school feeding and maternal and child nutrition activities. So, the key objectives of that program, of the McGovern-Dole program, are to reduce hunger and to improve literacy in primary education, especially for girls. The project provides school meals, but also a number of education quality-enhancing activities, such as training and related support, and so the project seeks full enrollment, and, ultimately, the goal is to booth boost academic performance.

Here on the slide you seed a map of where those projects are operating around the world. That was updated relatively recently, about six months. To give you a sense of the scale, there are about 90 active food-aid projects ongoing right now under both of those programs, so under Food for Progress and McGovern-Dole. Next slide.

So, getting right into the learning agendas then, here's kind of our definition, our understanding of a learning agenda, which I think is important to establish, because different agencies might have a slightly different definition of learning agenda or different use of application of their learning agenda.

We define the learning agenda as a set of unanswered research questions. These answers will strengthen our USDA programs and contribute to a broader knowledge base for all actors in similar programs or doing similar projects. Our learning agenda is a tool that identifies evidence gaps, and it can support the programs' ability to use rigorous evidence.

Why did we decide to do these learning agendas? So, we needed a strategic tool ourselves to help prioritize limited evaluation or research funds, and, hopefully, that resonates with some of the line; right? That's needed in a lot of agencies. So, we do have, you know, limited funds. They're available. But we need to know what's really the most important investment we can make to generate key evidence that will actually improve these programs.

It bears emphasizing, again, kind of what a learning agenda was for us. So, at the time our learning agendas were finalized in 2016, they do represent the gaps in rigorous publicly available evidence that we wanted to fill in order to strengthen our programs and similar programs. So every question in the learning agenda, in each learning agenda I should say, is what was at the time, an unanswered question; right, or it wasn't fully answered in a rigorous way, in a strong way, with a good body of evidence, and we identified those questions as the ones we wanted to answer in order to, again, strengthen our programs and similar programs, even by other actors.

Let identify right up front a couple of key challenges we face in creating new key learning agendas, because they kind of flow from that definition. One key challenge I'll talk a little bit more about, it was helping users and other stakeholders understand that the learning agenda for us, that product, was just a set of questions that need to be answered in the future. The answers

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

aren't there yet, so they're just a set of questions identifying those evidence gaps. And so, you know, internally I would say it wasn't a real uphill battle convincing people of the importance of identifying those questions, luckily. We did have a lot of leadership support. But, in general, you know, making sure that stakeholders understand the importance of that sort of first step; right, of just identifying the questions that need answering, in strategic and useful research, that was a little bit of a challenge, not internally, but in general, in working with working agendas. Let's move to the next slide. Thanks.

So, here are the actual steps we went through in developing our two learning agendas, the one for the Food for Progress Program and the one for the McGovern-Dole Program. And, first, a little bit of really kind of the nitty-gritty of the process, again, which I hope is helpful to those who are about to embark on this or are in the first stages. What we did at USDA was we hired contractors to facilitate the process of developing these learning agendas. So, we didn't do them internally, you know, with our full-time staff, but we did hire contractors to facilitate the process, and we can say who they are. Many of you may be familiar with the firms. QED did one of our learning agendas, facilitated the development of one, and Social Impact, another evaluation firm, facilitated the development of the other learning agenda. And, you know, that was a bidding process. For those unfamiliar, those are two of the many, you know, high-quality evaluation firms who may be available to help with this process in the D.C. area.

There were some pros and cons to having two different firms help us develop learning agendas in parallel. They were developed at nearly the same time. So, I'll just mention a couple of those, again, for those kind of embarking on this process yourselves.

An example of what I would call one of the pros was that, as our team and stakeholders within each of those teams within the USDA worked with those contractors to develop these parallel learning agendas, kind of learn from one experience and apply it to the other, you know, if one is slightly ahead of the other or was approaching the develop of the learning agenda in a slightly different order. They were very similar, the way they developed both the agenda but there were minor adjustments. For, example, after a workshop, where one program's learning agenda, you know, was helpful to us to be able to identify what worked well, what didn't work so well in the facilitation of that workshop and be able to apply those learnings to the other contractor, then facilitating a workshop to develop the other program's learning agenda.

I will just mention, again, kind of on the practical side that a con was it was certainly quite a bit of work on our part, so internally managing, you know, developing two different agendas with two different facilitators, you know, meant there was no efficiency gained in discussing, you know, our goals and, you know, our programs in ways, and what we could get out of the learning process since we did repeat on that, you know, entire process with each group. So, a couple of things to think about.

There were quite a few steps we went through in developing the learning agendas, which I'll now walk through.

Chris Talbot:  
Ellie.

Ellie Morefield:  
Yes.

Chris Talbot:  
I'm sorry. We're having a little bit of distortion on your telephone line right now. I don't know if you have it on speaker mode, if you might be able to try taking it off that mode and seeing if that clears it up.

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

Ellie Morefield:

I'm sorry. It's not on speaker mode. Let me sit still and maybe slow down a little bit. How is it right now? Can you hear me okay?

Chris Talbot:

It still has a little bit of digitized sound in the background. I may have to have you try hanging up very briefly and then dialing back into the line.

Ellie Morefield:

Sure. I'd be happy to do that, yeah. I'm hearing just a little distortion on your voice too. But let me try that. I will dial right back in. Thanks.

Chris Talbot:

For everybody else on the line, I do apologize for the delay as we're dealing with these technical issues. We hope to have Ellie back on the line very shortly. Okay, Ellie, I believe you're back on our phone line.

Ellie Morefield:

I'm back. How does this sound? Is it any better for you?

Chris Talbot:

It's sounding very good for right now.

Ellie Morefield:

Thank you. Okay. Thanks. Sorry about that, all. Okay, just yeah, please feel free to let me know if it happens again.

All right, to continue, then, with the development of our learning agendas, one more note on this slide was that USDA, me team and our other stakeholders, did actively manage the process, so while we did hire contractors to facilitate the development of the learning agendas, a lot of input was required, really, on every step, so it was really a collaborative effort between the contractors and the USDA. It took over a year to develop these two learning agendas. Next slide.

So, our first step was the combination of different types of research and systematic reviews to support the learning agenda. QED and Social Impact did desk reviews, of course, of our programmatic and background materials, of evaluations, of our ongoing food-day projects. They also did something called "intervention mapping," which was an interesting bit of research, of original research by the contractors where they took our intervention by actual projects over the last five years, so during a set time window, and kind of compared what projects were actually doing to our theory of change and to, you know, the activities we expected under our programmatic guidelines, and so it would reflect back to us what types of activities and in what proportions actual projects were focusing.

And the systematic reviews that were done for each of the learning agendas were extremely useful to us, so each facilitator, after USDA, identified of topics of interest. They conducted literature reviews on the topics using three IE standards. For anyone familiar, International Initiative for Impact Evaluation standards, and for the Food for Progress Project; for example, those systematic reviews focused on roads, on ICT, and on cooperatives. So, again those were teams identified by USDA that we wanted to sum up the existing evidence on as a step towards identifying these evidence gaps. In the McGovern-Dole program, those systematic reviews are on school feeding, health intervention, and nutrition. Next slide.

So, after the depth research and the systematic reviews were compiled, we were ready for roundtables. QED and SI and USDA develop an agenda and content for roundtables of subject matter experts. So, these were researchers, academics and policymakers who would provide input that would help shape the first draft of the learning agenda. So, in a way, you could see it as

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

a combination of, you know, depth research, existing research, and real live input from experts; right?

For Food for Progress, the roundtables included subject matter experts from various USDA offices, because our agency does have a lot of depth in agricultural and trade areas, you know, relevant to the Food for Progress program, and there were also external researchers, university professor, et cetera, who we identified as SMEs and invited to the round table.

For McGovern and Dole, many of the participants were outside of USDA, and, for example, they included experts from the Global Child Nutrition Program, from the World Food Program, from Tufts University and U.S. Aid, as well as others. So, those roundtables were convened. We discussed the learning agenda, evidence that exists, you know, the results of our systematic reviews, et cetera, and what gaps were in the field, in general, which would reflect our programs, but, again, would also be useful to other actors working in similar areas. Next slide.

So, those two key inputs led to the first draft of the learning agenda, the depth research and the kind of live expert input. We reviewed that first draft, circulated it among the stakeholders, and among the experts who had provided input, and so we have a draft ready for the remaining steps. That draft was produced pretty shortly after the roundtable, and the roundtable participants, again, those experts, were able to reflect on whether their input had been captured appropriately and any gaps that we hadn't captured. Next slide.

So, next in the development of both learning agendas came the workshop. Different from the roundtables in two ways; because of the participants and because they had, now, a draft learning agenda to react to respond and reflect on. So, these workshops included key practitioners and program stakeholders. Many of the participants were implementing active food-aid projects in our programs. So, they were great participants to be able to kind of ground truth the draft learning agenda questions for us; right, to really help us think through, were the answers to these questions benefit us all in ongoing improvement of our projects and of the broader program.

So, as an example there on the slide you see kind of how we facilitated reflection on that draft learning agenda. We asked people, actual practitioners, those implementing projects, do these questions adequately address evidence gaps, do they inform your program or project implementation, and are they really relevant, in the case of McGovern-Dole, to school feeding or, of course, to agricultural trade for Food for Progress? The McGovern-Dole implementers workshop was in early 2016, and the Food for Progress workshop was in May, a few months later, of 2016.

Notice that we also a field visit for Food for Progress, so there were just a few differences between how each learning agenda was developed. To develop the Food for Progress learning agenda, social impact did visit the Rural Active Food for Progress project ongoing at that time in Nicaragua, Senegal, and Mozambique. Next slide.

Okay. And so, with those inputs previously discussed, we then had a final draft of the learning agenda. We did do a webinar, inviting all of our stakeholders, the practitioners, but also, again, the experts who had all, you know, directly participated in shaping the agenda to review it with us and, again, reflect on what we still might be missing, you know, what we had captured and whether it was, you know, really critical or needed some tweaks before finalizing it. Next slide.

All right. And so now we have the learning agenda, the two learning agendas developed already, but this very last step, I think, deserves a little time, because this has been a very important part of the process for us. Our facilitators, our contractors, created evaluation plans to complement each of the learning agendas, so each learning agenda itself has quite a few questions. It's nearly 40 questions for each, but that's a lot of questions, and the evaluation plan is really an internal document for USDA that helps us operationalize the learning agenda. It prioritizes a subset of the learning agenda questions and suggests research and evaluation designs that would help answer

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

those questions, those priority questions for us internally within the program. The evaluation plans are intended to be a planning document for about five years, so they should help us through, you know, roughly 2021, about five years after the learning agendas were finalized.

In, summary, so I've now kind of gone through all of the steps of developing our two learning agendas. As we're reflecting on this, myself and my team, as they helped me prepare for this webinar, here are some themes that came out as we reflected on these steps and what we went through. First, we did feel like our learning agendas are pretty well-grounded truths. You know, in other words, we involved people throughout the process and we were, we think, pretty realistic about, you know, recognizing what's really practical, what's really relevant for our programs, in the hope that the learning agenda is a tool that, again, ourselves, but also other stakeholders working for successful programs can all use.

Our process was also very participatory, and we think that was a real strength in the end. You know, it takes a long time. This whole process was over a year long, and, you know, multiple touch points with various points of stakeholders and kind of even touchback points, you might say, where we double checked that we were on the right track. But we do, in the end, feel like making the development of learning agendas so participatory did help people, you know, essentially buy in to these questions being interested and important for the improvement of programs. We think our process was pretty thorough as well. Again, a lot of steps and a lot of reflection in between to make sure we were on the right track. Next slide.

So, here we are, as I noted at the very beginning, these were finalized in 2016, and the accompanying evaluation plans, you know, shortly thereafter, so we are in that fully implemented and operational stage. The McGovern-Dole learning agenda finalized in 2016. Just to give you a sense of what's in there, it has 41 questions across five topic areas, so all questions that we felt at the time didn't have, you know, a rigorous body of research to answer them, and that would be important to answer in order to our program and similar programs.

Those five areas for those curious are, for McGovern-Dole, school meal program implementation, education and literacy, health, nutrition, and agriculture. And the Food for Progress document then, that learning agenda finalized in July of 2016, has nearly the same number of questions, 39 questions across four topic areas. For those interested, those areas are market systems and, in fact, sub-areas there, value creation and market linkages, and then quality and standards, and risk and uncertainty.

I'll note quickly that, of course, I'm focusing on the process during this webinar. The learning agendas themselves are available. Embarrassingly, I checked the link right before the webinar, and the links are not working at this moment, so I would please invite any participants to contact me directly. I think my hope is they will put my contact information in the chat there. If you'd like a copy of the learning agenda, we'll get those links fixed soon. But they are publicly available documents intended toward anyone working in these areas, so you're welcome to see what the actual questions are in those learning agendas. And they'll also be available with other webinar materials on Mathematica's website in the future.

So, we're in this last stage here, but I think that's a good transition to talking about, hey, what's happened since 2016, and in the process of developing these, but also in our process of operationalizing them, what challenges and what barriers have we faced. Next slide. And so, these are really about the process itself, but also what we face since then, and some strategies that we've implemented and some that we haven't, but maybe will, to try to help overcome some of these barriers.

This first barrier really reflects the process, I would say the beginning of the process of development of the learning agenda. Even though we had good internal support, good leadership support, explaining to people what learning agenda is, and even what evidence gaps are, was a challenge, and it was something that we found -- you know, those were conversations we found

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

that we had to revisit over and over again, I would say, with a variety of stakeholders. So, sometimes, still, there is really kind of a slight misunderstanding that the learning agenda is the final product or contains answers; right, contains the learning. Really, the learning agenda is the first step in, you know, a much bigger process of generating good evidence; right? And, again, in our case, it really is just the question that we want to answer, and that we then need to pursue research to answer, you know, over the next five-or-so years in our case.

So, having that conversation over and over again was a bit of a challenge but well worth engaging all of our stakeholders in. You know, what are the evidence gaps, that was another challenge. I kind of have an anecdote there to explain why I felt that was a challenge. In one of our workshops, the implementer workshop that I was a part of, as we were developing the learning agendas, you know, I got into conversations with implementers about what are the real evidence gaps, what evidence exists to answer questions that we're all thinking about. And I had to talk about what evidence is; right, with implementers, and with other stakeholders as well, so that wasn't necessarily something I guess I had anticipated before the workshop.

We didn't necessarily have a common understanding from, you know, the M&E perspective and the implementer perspective on what evidence is, what was good enough evidence or hard enough evidence or rigorous enough evidence to feel like we had really answered a question, you know, versus what the implementers experiences might be on the ground; right? And so those experiences are valuable. Of course, we gathered implementers because of the value of their experiences on the ground, but talking about evidence and about research and what constitutes rigorous evidence, that was a conversation we had to revisit several times as we went through this learning agenda development process. So, again, a challenge, but, really, the only strategy that we've worked with so far, and I think it's worked, more or less, was to continue to engage in those important conversation.

If you can, as you develop your learning agenda, I would recommend going for a quick win. This isn't something we've really done yet, but I wish we had. If you can, you know, do a literature review, maybe shortly after learning agenda is left, or use, let's see, maybe draw research from various forces within your agency to help answer a question, maybe not fully answer, but help answer one of your priority questions. If you can essentially show people that having this question has helped you, then, simplify some evidence, some information and answer to the question right away, people will, I believe, you know, kind of grab on a little more easily to how this learning agenda can be used, how it can prioritize research for you.

The second barrier there is described as understanding the commitment. This was, as you may have gathered from my description, a very long commitment in just developing the learning agendas, but it continues to be a big commitment. We knew it would be, but, you know, again, just to share with others who may be approaching this process, know that developing learning agendas will take a lot of staff time, potentially a lot of resources, but, if you also consider your learning agenda to be just that first step in a much broader effort towards generating good evidence, then know that, you know, on a continuous basis, it's also going to take a lot of staff time and a lot of resources. It's possible having people fully focused, or a group of people partially focused on that ongoing engagement with the learning agenda, it's going to help you.

That kind of flows into our third barrier I wanted to highlight here, maintaining momentum, now what. We have our learning agenda at USDA for our food-aid programs. We have our evaluation plans. But it's a little bit of a challenge to maintain that momentum after the learning agenda itself was created. We've done a few small things. Having the evaluation plan helps. We do champion these learning agendas consistently. Specifically, I'll give an example.

In FY18, some funding became available to support M&E needs in our Food for Progress program, and we were able to, you know, specifically champion the use of our learning agenda and our evaluation plan we pulled right out during the meeting and said, hey, we have a learning agenda. The evaluation plan shows what our priorities were, you know, amongst these questions,

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

we had 39 questions, let's talk about are these priorities still most interested in learning right now in our program, and, still, can we take a top view and can we use this funding that has now become available to start some research, to do to literature review, or to generate evidence with an original research project, maybe an evaluation across country? So, we are championing the use of these documents. You have to be very intentional about it, I think is what I want to emphasize here. Next slide.

Getting to the end of our time here, so I'll just wrap up with the expected impact and some lessons learned before moving to questions. So, in terms of the expected impact of having these learning agendas, I think we are realizing more impacts on the second and third one here than the first; that all of this, we hope, will come to fruition. You know, one thing about identifying where there's a real lack of evidence is that even when you pursue generating that evidence, it might take a long-term in-depth research and study; right, and so that's what I mean by our expected impact on the first bullet, is that we'll be able better able to use evidence for the improvement of our program. A challenge reality there is that it might be a few years before we really get that evidence and can incorporate it, for especially the more complicated questions; right?

We do hope to improve our ability to make long-term research investments, and we are already seeing some impact there. Which is good. As I mentioned, I have that example of using the learning agenda itself, and even our internal evaluation plan to prioritize, you know, how to spend and strengthening funds for last year. So, we have invested in some long-term research projects, and we hope to continue to be able to do that.

This third expected impact, greater collaboration with our community, we are already seeing some results there, too, and, really, that just comes -- I say that just reflecting my and my team's experience in an ongoing technical assistance of our implementers. What I have seen myself, what my team has seen is just that because we were so participatory in the process, that our implementers really are interested in our learning agenda. Sometimes they send us research that they have done outside of the funding [inaudible] even that they think, you know, might be of interest to us, might help answer one of those learning-agenda questions.

And they also often ask what else they can do and what our plans are to answer these questions. And so, it is in a space between essentially a donor agency and the implementers, where we could really talk about existing evidence and evidence needs in a concrete way that we didn't have space for before. Next slide.

So, a few lessons learned, which kind of brings together the barriers, and I think the impact as well, in our experience developing learning agendas, but also operationalizing the learning agenda requires a huge level of effort, not just from us, but ultimately, you know, will be some other stakeholders from implementers, from researchers, that might contribute to answering those questions.

It is a long-term commitment. We're still, you know, reminding people that we have these, but that we've still got a number of years now where we're willing to actively use these strategic tools to prioritize funding and to begin and pursue, you know, long-term research that will share the results of our projects and answer these critical questions.

And, again, a lesson learned, I think a positive aspect of our experience, was that we made it very participatory. It was a long process. It was thorough. It was participatory, and that, I believe, is what led our implementers to sort of buy in and to continue engaging with us over time, you know, along similar agents have been established about evidence they're generating or what else they can do to contribute, or what they all might be learning from from other sources that generated evidence. So, it was participatory, and it's really created a good level of engagement that we didn't have before.

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

Thanks. I see I'm at the end of my time. I see I'm a couple minutes over. Sorry for that. Just want to reiterate, this was a great learning experience for us, and I really appreciate the chance to share with all the participants, this may be in fellow evaluators, so people approaching this process yourselves. Thanks for listening, and I really look forward to any questions or comments you may have.

Jessica McNab:

Great. Thanks so much, Ellie. That was such a comprehensive review, and I think a nice different perspective and different approach than what the NIH presented last week, which was also really detailed and, I hope, informative for folks who joined us.

So, with that, I know, Chris, you pushed some instructions in terms of asking Ellie some questions through the chat. And I see we have at least one question and other questions about sharing content. Ellie, thanks for reminding folks about how to ask questions on the learning agendas. So, again, Mathematica will have all of the information, including recordings, slides, and content that folks share with us on our Mathematica website, and we will share that information once it's available to you. But we will also push information out to you as we keep it and as we continue to get information or questions from participants or from folks who register for these events. Again, thanks, Ellie for sharing that information.

So, Chris, let me pivot to you here. Why don't you share the first question that came up, in terms of content, for Ellie.

Chris Talbot:

Sure. Thank you very much. We do have a question from Clint that is asking about the way you come up with the learning agendas and the evaluation plans, if there were major differences in emphasis between local implementers on one hand versus folks that are more distant from the implementation, like maybe your initial roundtable subject matter experts.

Ellie Morefield:

Great question. Thanks for that. And maybe you're picking up on kind of a little anecdote I shared, which may -- I wonder if that resonated with anyone else working in research or M&E. You know, that idea of talking with -- how it's different sometimes talking with implementers or, you know, even program managers about evidence than it is talking with subject matter experts or, you know, fellow researchers, and how I guess what I was getting at there was I was a little bit challenged in explaining, you know, what is evidence, why is it important. What is rigorous evidence and why is it important, and how do we know if we have it with the implementer who was thinking of their experiences, of course, and what they need to be do based on what they were doing on the ground?

And so, in terms of guess that's a way to say it wasn't necessarily the content, per se, that was so different. In general, in my experience, the implementers, you know, I think for some of the draft questions, I think they had more of an impression, not an answer, because of their own experience -- I'd love certain answers -- than the subject-matter experts who were reflecting that, you know, there wasn't rigorous evidence to prove one way or the other what a certain result might be, so there was -- I think this partially answered your question. That's what I noticed.

There was a sense from implementers that maybe more questions were already answered than the researchers or experts thought were answered, if that makes sense. So, wasn't so much in the specific content, but it was in the approach. And, again, that was an interesting experience for me, and I feel that's helpful for those thinking about learning, you know, just talking about evidence, identifying evidence is just simply part of the process there.

Chris Talbot:

Great. Thank you.

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

Ellie Morefield:  
Thanks.

Chris Talbot:  
And I also have another question that came in from Lauren; that is, wondered about have you been able to -- are you publicizing these results to try to disperse some academic activity or grave research in some of these areas of interest? Just trying to look at some of the different motivations that could be implemented in the approaches?

Ellie Morefield:  
The motivation; okay. Yeah, I mean, first I'll just note, just because the question invigorates publication, kind of a side note, let me take the opportunity to clarify the learning agendas, again, the link is broken now, but anybody can have those and can pursue research to answer any of those questions. We do hope that they're helpful beyond USDA and our programs. In USDA, just let me take the opportunity to also confirm that we started making the evaluations of the individual participant projects available to the public and long-term have a commitment to transparency, and to do that we just recently found a platform, so the platform is the DEC, so you may be familiar with the Development Experience Clearinghouse that USDA hosts. USDA evaluations [inaudible].

But, specifically in terms of, I guess, the motivation, that's interesting. I didn't necessarily say that spurring academic research itself was motivation, though that would be, you know, a welcomed response of learning agendas. I think it could be sort of a variety of ways to answer questions posed in the agenda, and certainly any new academic research coming out, or evaluations from federal agencies, you know, meta-analyses, systematic or literature reviews. You know, any form of evidence that comes out that helps answer the question would be welcome to us. So, it wasn't necessarily our motivation to spur academic research but to help ourselves and other actors in a project maybe, you know, synthesize, maybe inspire the research and maybe synthesize it so we could all use it, was the motivation.

Chris Talbot:  
Thank you. And Jeff is also asking a question regarding the fight you had on the barriers and strategies. There was one that mentioned that the strategy was to go forward with a quick win. And he was wondering if you might be able to elaborate on what the quick win was.

Ellie Morefield:  
That's a good question, and, yeah, that is a strategy that I would recommend to others who are developing or operationalizing their learning agendas. We don't have a quick win yet, and I think it would have helped us, particularly in the first year, let's say, after the learning agenda was finalized, but before, you know, any of our longer-term research investments came to fruition. I mean, the answer to the question really is that that's our recommended strategy. It's a learning, lesson learned for us, because we didn't have one.

We will have a medium-term win, you could say, in that we asked for this coming year for the learning agenda, ask for stakeholders in subsequent funding cycles to explicitly identify questions that they will contribute to answering as they evaluate their own projects, their own funded projects. So, in other words, because you have specifically identified and been able to concretely ask the projects at least fund in our annual funding cycle to really specifically contribute to those answers. So, within that [inaudible] projects start to roll in, we'll be able to synthesize some research and come back to implementers with some answers. Sorry, go ahead, Chris.

Chris Talbot:  
I'm sorry. Your phone was just breaking up a little bit. But I do have clarification as well on a question. Aside from putting the information available from these learning agendas on the website, did you have it up to reach out to researchers to try to motivate them to do research on that?

## HHS/ASPE Developing and Using Evidence-Building and Evaluation Plans for Improved Decision-Making: Foreign Agricultural Service, USDA

Ellie Morefield:

Not all. That's a good idea. I'm sorry for the audio. I'm actually moving to see it if gets better. We haven't -- no, we haven't reached out. Since the learning agendas were final, we haven't reached back out to researchers. Perhaps as a first step, we could reach out to the ones we engaged initially in our roundtables; right? We haven't reached back out to them to see what they may have worked on and if, in fact, they took the learning agenda to be directional for them. That's a great idea. We haven't done that yet, and I think maybe we will. Thanks.

Jessica McNab:

Thanks. Great questions. I'm glad we were able to get some of the questions, and there may be others that come in. Of course, you're welcome to put questions through our general inbox or help desk, which I'll put up in a minute, since we ran a little short of time. I imagine you have more questions. Ellie, I have more questions for you, but we'll save those for later.

Again, thanks for joining us, Ellie. I think you provided such a nice structure to the anatomy of your learning agenda, and, also, really invaluable that you have two learning agendas to share with us. So, again, please stay tuned as we share more information about registration for upcoming events, learning agenda examples that, of course, compile all in the summary report.

So, again, sounding a bit like a broken record, but all of that information will be loaded into a Mathematica website. Stay tuned on that information. Amanda will be sharing that information also internally, and, of course, we have a slew of upcoming webinars, which we're really excited about. So, next week, we have two webinars. Tammy Tippie from DoD/Navy will join us on Monday the 29th of July; Mary Hyde from CNCS on Tuesday, July 30th. Both 3:00 to 4:00 p.m. Eastern Daylight Time. Then on August 8th, from 12:00 to 1:00 p.m., Cynthia Phillips and Rebecca Kruse from NSF, August 13th, from 3:00 to 4:00 p.m.; Brittany Borg from SBA. And we are working on that registration, as mentioned last week. We've confirmed a date and a time for our final webinar, and that will be with Emily Schmitt from ACF on August, 28 from 3:00 to 4:00 p.m. Eastern Day Daylight Time. We will push that registration information to you all again, through the Federal Evaluator LISTSERV, so stay tuned for that information.

Once the webinar platform closes for you, you'll get a popup asking you to fill out four very brief questions. Same as our questions in the last event, we like to take a sense of how you think the webinar went. Did we meet our objectives? How did you feel about the content and what you learned, and will you take any action post-event? So please do feel free to take the 30 seconds or so that it takes to fill out that evaluation. That helps us to build this webinar series.

And with that, I'll thank you again for joining us. I know we're just almost at times here, so I believe Chris is pushing registration links, as well as our held desk e-mail to you for any feedback, comments, or questions that you might have for our team. That is [aspeevidencebuilding@mathematica-mpr.com](mailto:aspeevidencebuilding@mathematica-mpr.com).

And, Ellie, thanks again for chatting us through the anatomy of your learning agenda. We really appreciate it. Everyone have a great afternoon, and we will see you next week. Thank you. Take care.