



**DRAFT**

# LEARNING AGENDA

**IN SUPPORT OF THE PRESIDENT'S MANAGEMENT AGENDA**

OMB is requesting input on a draft Learning Agenda that outlines Government-wide management questions in support of the priorities of the President's Management Agenda

**The Biden-Harris Management Agenda Vision sets out key priorities for an equitable, effective, and accountable Government that delivers results for all Americans. A management-focused Learning Agenda in support of the President's Management Agenda ("PMA") will identify key Government-wide questions to answer in support of the PMA Vision.**

#### **HOW CAN YOU HELP?**

Whether you are a researcher or a public servant, you can help in answering these questions. If you are in Federal Government, State, local, Tribal, or Territorial Government, a research institution, a community organization, or a philanthropy, you are invited to join the work of refining and addressing these questions.

#### **WHAT IS A LEARNING AGENDA?**

Learning agendas focus attention on building and using the research and evidence needed to solve big problems. A learning agenda can:

- » Prioritize key questions
- » Spur coordinated research
- » Ensure results inform decisions

### WHY A PMA LEARNING AGENDA?

This PMA Management Learning Agenda is a first. It supports a larger effort under the PMA to advance management priorities for all Executive Branch departments and agencies (“agencies”) to improve how Government operates and performs. The PMA includes three core priorities:

1. Strengthening and Empowering the **Federal Workforce**
2. Delivering Excellent, Equitable, and Secure Federal Services and **Customer Experience**
3. Managing the **Business of Government** to Build Back Better

In support of the PMA vision of an equitable, effective, and accountable Government that delivers results for all, the **PMA Learning Agenda** will address critical evidence gaps and encourage research to close those gaps within, beyond, and in partnership with the Federal Government.

### THE PMA LEARNING AGENDA AIMS TO:



**Reinforce a focus on learning.** A learning agenda is not about delivering a thumbs up or down on a program for compliance monitoring. It can spur research that identifies which approaches work, why, and for whom, so those lessons can be applied across contexts to improve outcomes.



**Bridge silos.** Many of the most pressing issues do not fit neatly within the boundaries of a single agency. This PMA Learning Agenda provides an opportunity to coordinate learning and evidence-building across agencies by applying an efficient, whole-of-Government approach.



**Catalyze innovation beyond the Federal Government.** Many researchers, State and local leaders, and practitioners across the country are piloting and testing innovations and generating evidence to better serve their communities. Clearly communicating a PMA Learning Agenda with key Government-wide management questions can catalyze coordinated innovation with research institutions, and within and across agencies in the Federal Government, and State, local, Tribal and Territorial Governments.

Federal agencies are finalizing comprehensive learning agendas they will publish in early 2022. These are an important milestone for implementation of the Foundations for Evidence-Based Policymaking Act of 2018. This PMA Learning Agenda identifies evidence gaps related to advancing PMA priorities. The forthcoming Agency Learning Agendas may pose similar questions that are relevant for their specific operations and mission. All of these efforts are critical in communicating and coordinating what evidence is needed and how it can be used to improve the working of Government.

OMB is welcoming public input on this draft Government-wide PMA Learning Agenda before OMB releases a final version.

#### WHAT ARE THE LEARNING AREAS OF FOCUS?

This draft Learning Agenda works toward the PMA priorities across Federal agencies in three learning areas of focus. These initial areas of focus are intended to initiate strategic evidence building efforts, not to be comprehensive. Below, each learning area of focus identifies draft questions and examples of sub-questions.

The draft questions on the following pages are framed in the context of the Federal Government. However, research conducted beyond government, including in the private sector, may have valuable insights that can be applied across contexts and the PMA Learning Agenda intends to welcome that research as well.

# How can the Federal Government strengthen and empower its workforce, so it can best serve the American people?

The Biden-Harris Administration wants the Federal Government to be a model employer, operated by a talented, diverse, and engaged workforce. What are effective strategies to hire, retain, engage, and grow talent within the Federal Government? Many of these questions could leverage the recent workplace and hiring flexibilities that were implemented in response to the COVID-19 pandemic. New evidence on these questions could guide decisions at agencies and may also have relevance for employers and organizations beyond the Federal Government.

## **What approaches to recruitment and hiring result in high-performing, diverse teams in Federal agencies?**

### **EXAMPLE QUESTIONS:**

- What hiring assessments and practices effectively identify qualified talent, especially in high-need areas? What approaches result in a positive applicant experience, either leading to acceptance of a position, or willingness for a qualified (but not-selected) candidate to apply for other opportunities? To what extent can alternative hiring mechanisms improve the recruitment of skilled professionals while reducing the time to hire? Do these approaches lead to more or less equitable hiring outcomes?
- Looking to the future of work, what organizational structures for work, workplaces, and workforces create a competitive advantage for recruitment and retention? What workplace flexibilities and strategies, including related to pay and benefits, promote equity, diversity, inclusion, engagement, and performance?

**What strategies improve retention, engagement, inclusion, and wellbeing among Federal employees, while reducing burnout and attrition?**

**EXAMPLE QUESTIONS:**

- How can the Federal Government be nimbler in understanding the Federal employee experience? What information do agency leaders need to improve employee engagement and retention? How can lessons from externally-facing customer experience initiatives inform improvements to the Federal employee experience?
- What management practices advance disability inclusion and empower Federal employees with disabilities? What management practices advance inclusion and empowerment of other underrepresented Federal employees?

**What approaches build a strong, empowered, and diverse cohort across the Federal Government employee lifecycle?**

**EXAMPLE QUESTIONS:**

- What management strategies (e.g., delegating authorities, rewarding innovative risk) can better empower Federal employees to innovate and solve problems? Which of these approaches improve agency and unit-level organizational health?
- What strategies are effective in boosting career growth (including rotations, fellowship programs, and paid internships)? What approaches to upskilling and reskilling are effective for retention? Which of these strategies effectively strengthen a diverse cohort in senior leadership positions and civil service leadership pipelines?



## How can the Federal Government deliver programs and services effectively and build trust?

A key priority of the PMA Vision is to deliver an excellent customer experience through quality, equitable, and secure Federal services. Every interaction between the Federal Government and the public, whether it involves renewing a passport, filing taxes, or calling for a status update on a farm loan application, should be an opportunity to deliver the value, service, efficiency, and competency that the public expects and deserves. The Federal Government can build trust by demonstrating that its processes are fair, secure, effective and efficient. There are many unanswered questions about how to best measure trust and understand how different elements (such as speed, quality, ease, transparency) drive trust for different types of service interactions.

### **How can Federal agencies reduce administrative burdens in programs and services—including complicated, confusing, and time-consuming processes people may encounter when trying to access those programs and services?**

#### **EXAMPLE QUESTIONS:**

- What approaches effectively reduce unnecessary administrative burdens for people, especially those that disproportionately affect underserved communities?
- How can minimizing administrative burdens also improve upon objectives of minimizing improper payments and strengthening program integrity?

## **What approaches deliver an excellent customer experience with the Federal Government?**

### **EXAMPLE QUESTIONS:**

- Which important life experiences that require interaction with the Federal Government are crucial for improving outcomes and reducing burdens for all Americans? These might include the birth of a child, turning 65, losing a job, or experiencing a natural disaster, which often involve interacting not only with multiple Federal agencies but also with different levels of government.
- How can Government services be more efficiently integrated and bundled to better deliver results for people?
- In what cases do people need individual support to navigate a complex Government process, and when can an automated or virtual process achieve a similar outcome?

## **How can the Federal Government enhance the public's trust?**

### **EXAMPLE QUESTIONS:**

- What methods effectively measure trust in a public service environment?
- How do various touch points between a person and Government services affect trust in Government? Is it speed (e.g., short hold times for a phone call), transparency (e.g., open data with accessible dashboards), or knowledgeable service (e.g., staff with expertise to solve a problem)? In those contexts, how do different modes or styles of communication (e.g., live chat, in person, over the phone) affect trust?



# How can the Federal Government advance equity and support underserved communities?

On the first day of the Biden-Harris Administration, President Biden signed an Executive Order to [advance racial equity and support for underserved communities](#). This Executive Order calls for a whole-of-Government effort to advance equity. The [Office of Management and Budget's report to the President](#) on leading methods for assessing equity recognizes that equity assessments of Federal programs represent an expanding, though still nascent, body of work in public policy, social and data science, and organizational change management. The Executive Order outlined a vision of equity that promotes fair and just treatment of all individuals, including those historically underserved, across a range of dimensions from race, gender, and sexual orientation to geography, income, and disability. The following questions are focused on learning how advancing equity can benefit all.

## **How can equity be advanced in the design, delivery, and evaluation of Federal services?**

### **EXAMPLE QUESTIONS:**

- What approaches effectively improve equitable distribution of grants, loans, or other time-sensitive Federal funding and benefits programs from enacted laws (such as the CARES Act, the American Rescue Plan Act, or the Infrastructure Investment and Jobs Act) or in response to disasters, climate-related crises, or public health emergencies? What lessons were learned from the public health and economic crises of the pandemic that can inform the development of future Federal programs that are both responsive to a crisis and deliver equitable outcomes?

- What strategies effectively remove barriers to awareness of, access to, and delivery of Federal services, particularly for historically underserved individuals or populations?
- What characteristics of Government procurement, grants, or contracting structures make them effective for reaching underserved communities or businesses owned by historically excluded groups?

### **What organizational tools and management structures advance equity?**

#### **EXAMPLE QUESTIONS:**

- What management structures, tools, or trainings for Government employees effectively improve equity outcomes in an agency's operations and mission? Does changing decision making structures to include equity-focused practices promote more equitable outcomes?
- What approaches to equity assessments result in Federal agencies improving equity in the outcomes of their work?

### **What larger organizational changes in agencies are needed to identify and address underlying barriers to advancing equity?**

#### **EXAMPLE QUESTIONS:**

- If agencies engage with traditionally underrepresented stakeholders at the outset when key decisions are made, does that early engagement affect outcomes and intended impact (e.g., including those whom programs are meant to serve at an earlier stage in the design process or during the definition of eligibility criteria)?
- What are effective approaches that agencies can take in managing the business of Government to address barriers that have hindered equal opportunity?



## SHAPE AND BUILD THE PMA LEARNING AGENDA

Agencies across the Federal Government have been developing Agency Learning Agendas, which will be published in early 2022. The questions in this draft PMA Learning Agenda draw on that important work and aim to highlight cross-cutting management areas where evidence is needed to support the goals of the PMA.

You can help refine and answer these questions, whether you are a researcher or a public servant, from a community organization or a philanthropy. Your contributions are needed to ensure that the questions pursued reflect the best available evidence and the needs of those who interact with the Federal Government at every level. You can join efforts to create research that is shared with and that can be used by decision makers in Government.

### How you can help

- [Share your ideas](#)  
(Deadline: January 31, 2022)
- Become a [government research fellow](#) at GSA  
(Apply by January 3, 2022 or email [oes@gsa.gov](mailto:oes@gsa.gov) for future opportunities)
- Sign up for [updates](#)
- View Agency Learning Agendas at [www.evaluation.gov](http://www.evaluation.gov)  
(Spring 2022 release)

### How were the draft questions selected?

The Draft PMA Learning Agenda prioritizes questions that:

- Advance one or more of the PMA priorities
- Build on **Agency Learning Agenda** priorities

- **Align** with Administration priorities across Government
- Require **cross-agency coordination** in implementation or data access
- **Recognize** the importance of State, local, and Tribal **implementation** of Federal programs
- Have **relevance beyond** the Federal Government that engages the research community

### **What values and principles should drive the studies that result from the PMA Learning Agenda?**

This learning agenda intends to spur a wide range of evidence-building and research activities. You are welcome to participate and share your ideas.

Please keep in mind, these studies should reflect the PMA values of **equity, dignity, accountability, and results** and embrace common principles to:

- Provide actionable answers to Government's priority management questions;
- Result from collaboration with Government partners and civil servants;
- Be guided by input from a diversity of perspectives and communities on study design, implementation, and use of results;
- Select research methods that match a study's intended use (e.g., observational data for descriptive questions, qualitative data to understand mechanisms, impact evaluations to infer causal relationships);
- Lead with transparency, including by releasing the study design and analysis plans in advance; and
- Share all study results openly, even if they are inconclusive or unexpected.

**RELATED EFFORTS**

Each of the questions in this draft PMA Learning Agenda builds on ongoing efforts across the Federal Government. If you are a researcher and want to engage with this work, please read more about these efforts so you can further build upon them and add to work that is already underway.

Individual agencies have been advancing work in these areas. In early 2022, agencies will release their respective learning agendas at [Evaluation.gov](https://www.evaluation.gov), which will include some questions that connect to those in this draft PMA Learning Agenda.

**Learning agendas and evidence-building**

- » OMB guidance:
  - [OMB Memorandum M-19-23](#), Phase 1 Implementation of the Foundations for Evidence-Based Policymaking Act of 2018: Learning Agendas, Personnel, and Planning Guidance (July 10, 2019)
  - [OMB Memorandum M-20-12](#), Phase 4 Implementation of the Foundations for Evidence-Based Policymaking Act of 2018: Program Evaluation Standards and Practices (March 10, 2020)
  - [OMB Memorandum M-21-27](#), Evidence-Based Policymaking: Learning Agendas and Annual Evaluation Plans (June 30, 2021)
  - [OMB Circular A-11, Section 290](#) - Evaluation and Evidence-Building Activities
- » GSA [Toolkit](#) for developing a learning agenda

### **Supporting the Federal workforce**

- » [Executive Order 14003: Protecting the Federal Workforce](#)  
(January 22, 2021)
- » [Executive Order 14035: Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce](#) (June 25, 2021)

### **Delivering services**

- » [Executive Order 14058: Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government](#)  
(December 13, 2021)
- » Federal Customer Experience [blog](#)

### **Advancing equity**

- » [Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#)  
(January 20, 2021)
- » [Study to Identify Methods to Assess Equity: Report to the President](#)  
(July 2021)
- » [Request for Information](#) on Methods and Leading Practices for Advancing Equity and Support for Underserved Communities through Government (closed July 6, 2021)
- » Equitable Data Working Group [blog](#)